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August 22, 2024

VIA HAND DELIVERY AND ELECTRONIC MAIL

Stephanie De La Rosa, Commission Clerk
Rhode Island Public Utilities Commission
89 Jefferson Boulevard
Warwick, RI 02888

**RE: Docket No. 22-33-EE – 2023 Annual Energy Efficiency Plan
Corrected 2023 Energy Efficiency Year-End Report**

Dear Ms. De La Rosa:

On behalf of The Narragansett Electric Company d/b/a Rhode Island Energy (the “Company”), enclosed, please find the Company’s Corrected 2023 Energy Efficiency Year-End Report (“Corrected Year-End Report”). This filing includes the following documents.

- Narrative (Corrected August 22, 2024) (Bates 1-30)
- Corrected Attachment 1 – Electric Tables (Corrected August 22, 2024) (Bates 32-42)
- Corrected Attachment 1a – Electric Cost Schedules (Corrected August 22, 2024) (Bates 44-54)
- Corrected Attachment 6 – 2021-2023 Three-Year Plan Comparison (Corrected August 22, 2024) (Bates 112-125)

The other attachments (Bates 55-111) were not impacted and remain as filed on May 1, 2024.

Corrections

While reviewing documents in the ConnectedSolutions docket, the Company discovered an isolated clerical error in the electric portfolio. A table in Excel had inadvertently been converted to a range, such that when new additional data was appended to the table, the extra data was not automatically included by the formulas that provide the totals by program. There are separate formulas in place to ensure all output totals matched the full input expenditure data, but unfortunately they were also affected by this table conversion, and subsequently did not flag the discrepancy. The files have been updated to catch any similar issue going forward.

The Company also came across a minor error regarding Office of Energy Resources (“OER”) and Energy Efficiency Resource Management Council (“EERMC”) actual program implementation expenses. In the initial Year-End Report filing dated May 1, 2024, the OER and EERMC actual program implementation expenses were inadvertently switched. The error has been fixed through this corrected filing.

Finally, this corrected version includes notes in Schedule 1 and Schedule 6 that were left out of the initial filing dated May 1, 2024. In the initial filing, the notes were inadvertently cut off by the print area. Through this corrected filing, the Company updated the print area to make sure those notes are captured going forward. (The notes in Schedule 3 of this corrected filing were also included in the initial filing.)

Highlights (as corrected)

For 2023, the Company spent a total of ~~\$97.7M~~ \$97.9M on the electric portfolio as compared to the approved budget of \$99M. The Company spent a total of \$29.5M on the gas portfolio as compared to the approved budget of \$36.1M.

The 2023 programs created electric cost savings of \$180M and gas cost savings of \$80M for Rhode Island customers over the life of the installed energy efficiency measures. The programs supported 749 full-time equivalent workers and added \$248M to Rhode Island's gross state product.

For 2023, the Company achieved 644,697 lifetime MWh energy savings which equates to 96% of target set forth for the 2023 program year by the 2021-2023 Energy Efficiency and Conservation Procurement Plan ("Three-Year Plan"). For gas, the Company achieved 3,005,293 lifetime MMBtu which equates to 85% of target set forth for the 2023 program year by Three-Year Plan.

The 2023 electric demand savings were 47,421 kW which equates to 82% of the target set forth by the Annual Plan.

For 2023, the total shareholder incentive earned by the Company was ~~\$2.43M~~ \$2.41M for electric and \$398k for gas. The actual performance incentive earned by the Company in 2023 is not reflected in current rates. Therefore, this correction does not impact current rates.

Thank you for your attention to this filing. If you have any questions, please do not hesitate to contact me at 401-784-4263.

Sincerely,



Andrew S. Marcaccio

Enclosures

cc: Docket No. 22-33-EE Service List
Docket No. 23-35-EE Service List

**The Narragansett Electric Company
d/b/a Rhode Island Energy**

Corrected
2023 Energy Efficiency Year-End Report

August 15, 2024

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Attachments

Attachment 1: Electric Summary Tables of Year End Results

Attachment 1a: Electric Costs Schedules

Attachment 2: Gas Summary Tables of Year End Results

Attachment 2a: Gas Costs Schedules

Attachment 3: Case Studies and Evaluation Summaries

Attachment 4: Year End Participation Memo

Attachment 5: Rhode Island Energy Efficiency Program Vendor List

Attachment 6: 2021-2023 Performance Comparison

Overview

This report details electric and gas energy efficiency (EE) program results, highlights, and customer experiences throughout the 2023 program year. Rhode Island Energy's (the Company) electric and gas programs are described in detail in the Annual Energy Efficiency Plan for 2023, filed in Docket No. 22-33-EE on 9/30/2022 and approved by the Rhode Island Public Utilities Commission (PUC) at its open meeting on 12/22/2022. In 2023, one of the Company's central goals was to achieve electric and gas savings relative to targets established in the 2023 EE Plan, which were consistent with the goals established for 2023 in the 2021-2023 Three Year Least Cost Procurement Plan.

The 2023 electric energy savings target was 673,430 net lifetime MWh. At year's end, the Company achieved 644,697 lifetime MWh energy savings (96% of target). The 2023 demand savings target was 57,954 annual kW. At year's end, the Company achieved 47,421 kW savings (82% of target). The 2023 gas savings target was 3,537,835 net lifetime MMBtu. At year's end, the Company achieved 3,005,293 lifetime MMBtu (85% of target).

In total, the 2023 programs created electric cost savings of \$180 million and gas cost savings of \$80 million for Rhode Island customers over the life of their installed energy efficiency measures. In addition to cost savings, the 2023 EE programs created other significant economic benefits. In 2023, the programs supported 749 full-time equivalent (FTE) workers. Many of the jobs created by these energy efficiency investments were local. In fact, of the 626 companies and agencies involved in the Company's 2023 energy efficiency programs, 68% were located in Rhode Island. Additionally, the Company's 2023 EE programs will add \$248 million to Rhode Island's Gross State Product (GSP). Case studies of 2023 program activities and summaries of evaluation studies conducted in 2023 can be found in Attachment 3. Details on customer participation in energy efficiency programs in 2023 can be found in Attachment 4.

This year, the Company has adjusted the report structure to include analyses of any observed variances between planned and actual annual net savings, and between planned budgets and actual expenditures in 2023. These analyses are integrated into the Overview of Performance section for each program where they are applicable. These analyses were specified in the modifications to the Least Cost Procurement Standards adopted in Docket 23-07-EE (Standards).

The Standards Section 3.4B(xi) requires:

Following the conclusion of an Annual Plan, the distribution company shall report on the following items to the PUC no later than May 1 of the following year:

(1) Comparison of the distribution company's projections for total program-level annual net energy savings likely to be delivered during the program year and the program-level budgets required to deliver those savings, developed for the Annual Plan pursuant to Section 3.4.a.ii of these Standards, to actual program-level energy savings and budgets during the program year;

(2) If the distribution company's projections for total program-level annual net energy savings and budgets varied from actual program level savings and budgets by more than 5%, a description of the variance and, where applicable, an explanation of the cause of such variance ("Explanation of savings and budget variances");

(3) If the distribution company's projections for total program-level annual net energy savings and budgets varied from actual program level savings and budgets by more than 5%, an explanation of any adjustments the company made to its own Annual Plan programming (savings goals, incentive levels, or budgets) in response to such variance ("Explanation of mid-year adjustments")

The Company focused its variance analyses only on those plan components that provide energy savings. For example, even though funds were budgeted in the 2023 Plan for Pilots, Demonstrations, and Assessments, because that plan component is not designed to provide savings, it is not part of the analyses.

The Company provides the comparison at the program level, as specified in the Standards. The Company notes that, in general, deviations from program-level planned budgets within a sector reflect a response to market conditions and consumer demand as the program year unfolds. This is typical in energy efficiency program administration and the Company appreciates having the flexibility to respond in this way. Deviations at the portfolio level are smaller than deviations at the program level and, in fact, for the electric portfolio, both annual savings and spending are within 5% of planned values.

The comparisons at the program level presented and described in this report do not include the budgeted or earned performance incentives. The Company has provided the variance analyses herein based on annual savings, as specified in the Standards.

Residential Programs

Overview

In 2023, the Residential sector was cost-effective, achieving Rhode Island Test benefit-cost ratios of 1.33 for electric programs and 1.45 for gas programs. The Company spent 99% of its electric Residential implementation budget, achieving 101% of target Residential net lifetime electric energy savings and 91% of target Residential electric net annual demand savings. The Company spent 77% of its gas Residential implementation budget and achieved 91% of target Residential net lifetime gas savings. More detailed information can be found in Attachment 1 for electric and Attachment 2 for gas.

EnergyWise Single Family

EnergyWise is a direct-to-customer in-home program that educates residents on how their homes can become more energy efficient. In 2023, in-person and virtual programming was offered. EnergyWise works with single family customers of one-to-four-unit buildings in a two-pronged approach. During the initial visit (known as the home energy assessment) an energy specialist spends one-to-three hours providing educational materials and evaluating the customer's home. Instantly recognizable savings opportunities (such as pipe insulation) are installed during this first visit. At the completion of the assessment, the customer receives an Energy Action Plan that recommends additional energy savings opportunities and any accompanying incentives / financing options. Customers that proceed to the next phase of EnergyWise receive weatherization upgrades that provide savings for twenty years regardless of fuel type used. Overall, customers that install EnergyWise weatherization upgrades increase comfort while saving money on energy.

Overview of Performance

In 2023, the EnergyWise Single Family program achieved electric savings of 15,596 net lifetime MWh (92% of target). The program achieved 76% of its filed annual electric savings goal, while spending 101% of its filed annual electric budget.

The electric savings for this program were lower-than-expected due to an increase in measures with delivered fuel savings such as aerators, pipe insulation, and showerheads.

In 2023, the EnergyWise Single Family program achieved gas savings of 524,666 net lifetime MMBtu (107% of target). The program achieved 112% of its filed annual gas savings goal, while spending 79% of its filed annual gas budget.

The overperformance of the gas program savings is attributed to a higher-than-planned uptake of faucet aerators and pipe insulation measures. These measures, due to the quantity installed and the relatively low cost, helped drive savings above 100% while reducing impacts on the budget.

Highlights

Throughout 2023, RISE (the EnergyWise Lead Vendor) took several steps to improve the customer experience and encourage program participation. These steps included utilizing Virtual Home Energy Audits (VHEAs) to reduce wait times for customers requesting audits exclusively for heat pumps and expanding its concierge service to assist customers with heat pumps. RISE also hired seven new Energy Specialists, including three Spanish speaking individuals.

Residential Consumer Products

The Residential Consumer Products (RCP) program leverages in-store retailer visits and social media campaigns. An online training platform is used to educate retail sales staff on the program's products and functions. This platform is a critical resource for retailers due to the large number of products and features associated with different appliances.

Overview of Performance

In 2023, the Residential Consumer Products program achieved 15,024 net lifetime MWh of electric savings (47% of target). The program achieved 48% of its filed annual electric savings goal, while spending 73% of its filed annual electric budget.

The lower-than-expected savings and spend for the Residential Consumer Products program was primarily due to the appliance recycling vendor unexpectedly ceasing services in July. The Company expects to have a new vendor in place for go live in mid-2024. Other significant factors were general trends in the economy. The uncertain economy has had a negative impact on non-essential consumer spending, particularly large appliance purchases. Home Depot and Lowes both reported that consumer spend was down significantly. Neighboring utilities also stated their Energy Star Appliance programs were in a similar situation.

Highlights

The Residential Consumer Products Lead Vendor continued to promote the energy efficient products offered under the Rhode Island Energy program by staffing educational tables at big box retailers such as Lowe's, Home Depot, and Walmart. These informal events provide an opportunity for Rhode Island Energy customers to ask questions and gain information about a broad range of energy efficiency programs.

As part of its continued dehumidifier recycling campaign, Rhode Island Energy finished 2023 with a record total of 1,517 old, inefficient dehumidifiers recycled (far exceeding 2022 results, which was another record year). Rhode Island Energy made a concerted effort to target diverse communities and scheduled recycling events throughout the state. The continued success of this campaign has further enhanced Rhode Island Energy's reputation as a strong community partner.

The program also continued its Most Efficient Appliance Initiative. Building off the progress of the midstream offerings at Home Depot, Rhode Island Energy and the Lead Vendor partnered with Lowe's to offer ENERGY STAR® most efficient washers, dryers, and refrigerators to Rhode Island Energy Customers. The initiative with Lowe's began in the fourth quarter and they processed a total of seventy-seven products, a number that is expected to increase into 2024.

Home Energy Reports

The Home Energy Reports program encourages energy efficient actions through personalized print and email reports. Each communication channel displays energy consumption patterns, energy reduction goals, and comparisons to similarly sized and heated homes.

Overview of Performance

In 2023, The Home Energy Reports program achieved 25,932 net lifetime MWh of electric savings (107% of target). The program achieved 107% of both its filed annual electric savings goal and filed annual electric budget, respectively.

The electric savings overperformance resulted from treatment customers saving more energy than the control population, thereby resulting in greater planned savings. The increase in electric spending came from the 2022 pay for performance coming later in 2023 and being paid out of the 2023 budget rather than the 2022 budget. The 2023 pay for performance payment came early enough in 2024 to be accrued into the 2023 budget. The Company encouraged the vendor to provide pay for performance results earlier in the calendar year so they could be accrued to the correct program year. Going forward, the goal is to have only the program year expenses reflected within the budget.

In 2023, the Home Energy Reports program achieved 106,308 net lifetime MMBtu of gas savings (116% of target). The program achieved 116% of its filed annual gas savings goal, while spending 105% of its filed annual gas budget.

Highlights

In 2023, Home Energy Reports provided energy efficiency messaging on the following topics:

- High-efficiency heating systems
- Electric heat pump water heating
- ENERGY STAR® efficient room air conditioners
- Cold-climate heat pumps
- Air purifiers
- Smart thermostats
- Home Energy Assessments

Residential New Construction

The Residential New Construction (RNC) program supports the ground-up development and renovation of single family and multifamily homes for market rate and income eligible customers. The program includes a Home Energy Rating System rating, energy modeling and design assistance, in-field technical training, insulation and air sealing inspections, building performance testing, educational outreach, energy performance-based incentives, complimentary WaterSense® showerheads, optional ENERGY STAR® Homes verification, and support for projects seeking additional certifications such as DOE Zero Energy Ready, Passive House/PHIUS, LEED-H, and Living Building Challenge.

Overview of Performance

In 2023, the Residential New Construction program achieved 10,324 net lifetime MWh of electric savings (79% of target). The program achieved 82% of its filed annual electric savings goal, while spending 63% of its filed annual electric budget.

The lower-than-expected electric savings and spend can be attributed to new construction projects experiencing late starts due to delays with permitting, labor, material shortages, funding, etc. and thus, construction schedules for some of the larger projects being extended into the following year. Lastly, funding can often slow down income eligible projects due to the need to secure multiple funding sources.

In 2023, the Residential New Construction program achieved 57,303 net lifetime MMBtu of gas savings (98% of target). The program achieved 98% of its filed annual gas savings goal, while spending 119% of its filed annual gas budget.

Highlights

In 2023, 470 housing units were built to program standards, which represents a 9% increase over 2022 year-end totals.

- Construction Type: 454 units were new construction/full gut rehab (97%) and 16 were renovation/rehab (3%)
- Income Level: 334 units were market rate (71%) and 136 were Income Eligible (29%)
- Heating Type: 149 units had electric heat pumps (32%), 256 units had gas heat (54%) and 65 units had either propane or hybrid heat pumps with propane (14%)
- 199 homes achieved >25% savings over the program baseline (42%)
- 52 homes were ENERGY STAR and DOE Zero Energy Ready Homes certified and 48 are being submitted to PHIUS for official Passive House Certification

In addition, 798 newly planned housing units enrolled in the RNC Program.

Below is an example of a DOE Zero Energy Ready (ZER) single-family home on Biscuit City Road in Charlestown:

- The RNC program held a tour of this single-family home, in collaboration with the builder Steve DeMetrick of DeMetrick Housewrights



Also in 2023, the RNC Lead Vendor partnered with local builders and designers to establish a local Passive House chapter. The chapter's mission is to promote the Passive House Building Energy Standard in Rhode Island through public outreach, education, advocacy, and training. The chapter held two inaugural events and attendees included architects, builders, homeowners, insulation representatives, students, and housing non-profits and agencies.

EnergyStar HVAC

The Residential EnergyStar HVAC program promotes the installation of high-efficiency equipment for gas and electric space heating and cooling, water heating, and controls via tiered customer rebates. The program provides contractor training and incentives to ensure best practices for the proper design of distribution system improvements, equipment sizing and quality installation.

Overview of Performance

In 2023, the EnergyStar HVAC program achieved 98,697 net lifetime MWh of electric savings (140% of target). The program achieved 137% of its filed annual electric savings goal, while spending 100% of its filed annual electric budget.

In 2023, the EnergyStar HVAC program achieved 433,147 net lifetime MMBtu of gas savings (84% of target). The program achieved 78% of its filed annual gas savings goal, while spending 80% of its filed annual gas budget.

The underperformance of gas savings and spend can be attributed to an increased emphasis on heat pumps from many sources outside of Rhode Island Energy showing an impact on gas heating equipment. Inflation and economic uncertainty have also impacted customer spend on large heating upgrades and incentivizes them to pursue additional longevity from their existing system. Lastly, issues with the Rhode Island Energy Online Marketplace in 2023 resulted in lower than anticipated thermostat measures.

Highlights

In 2023, Rhode Island Energy continued the HVAC program's weekly newsletter. Featured topics included rebate submission reminders/deadlines, promotion of upcoming trainings, industry best practices for successful installation and operation, availability of program support in Spanish, and FAQs and updates on Clean Heat Rhode Island (the Rhode Island Office of Energy Resources' heat pump incentive program). There are over 650 recipients currently on the newsletter's distribution list including HVAC companies, contractors, technicians, distributors, trade allies, and other industry stakeholders.

Beyond the newsletter, the HVAC Program actively encouraged contractors and customers to seek rebates from Rhode Island Energy and Clean Heat Rhode Island where eligible under each program's rules. Links to Clean Heat RI are included on Rhode Island Energy's website and rebate portal. The two programs worked together in the fourth quarter to align offerings.

Throughout 2023, The HVAC Program has been working to adapt to the introduction of new DOE heat pump equipment ratings and standards. The program offered various Cold Climate Heat Pump trainings, Introduction to Heat Pump presentations, right sizing trainings, and live virtual and on-site HVAC Check Testing trainings.

Multifamily

The Multifamily program serves gas and electric multifamily buildings (5+ dwelling units). The program is available to both market rate, Income Eligible, and C&I customers. Offerings include energy assessments, incentives for heating / domestic hot water systems, cooling equipment, lighting, and appliances.

Overview of Performance

In 2023, the EnergyWise Multifamily program achieved 3,466 net lifetime MWh of electric savings (37% of target). The program achieved 48% of its filed annual electric savings goal, while spending 63% of its filed annual electric budget.

In 2023, the EnergyWise Multifamily program achieved 27,929 net lifetime MMBtu of gas savings (25% of target). The EnergyWise Multifamily program achieved 23% of its filed annual gas savings goal, while spending 30% of its filed annual gas budget.

The lower-than-expected electric and gas savings and spend are a result of market factors including inflationary and general economic pressures. These factors made multi-family building owners less willing to undertake capital improvement projects. Additionally, the market for electrical efficiency upgrades at multi-family properties is quite mature, with much of the multi-family market previously adopting lighting and other electric savings upgrades through the program.

The program sought to increase program participation through marketing campaigns during the year targeting landlords and multi-family building owners. In an effort to maximize participation, the Company's Lead Vendor conducted outreach and follow up communications to multi-family partners with projects in the pipeline and to those that had expressed interest in participation. The Company is working to improve program performance and right-size targets moving forward.

Highlights

Below are three examples of projects completed in 2023:

- **Regency Plaza Apartments in Providence:**

The project consisted of upgrades included water source heat pumps, variable frequency drives, and wall and pipe insulation. The electrical incentive for this project was \$110,463 with an estimated 1,171,500 net lifetime kWh savings, and the gas incentive was \$69,675.92 with an estimated 113,098 net lifetime therms savings.

- **56 Tell Street Apartments in Providence:**

The project installed six slim duct air source heat pump systems in a 3-story apartment building consisting of six 2-bed apartments. The heat pumps replaced electric baseboard heat. The electric incentive for this project was \$78,750 and the estimated net lifetime savings is 428,150 net lifetime kWh.

- **Shadow Farm Condos in Wakefield:**

The project installed attic insulation, duct sealing, attic air sealing, basement sill insulation, and programmable thermostats to participating units. In order to complete the attic weatherization, it was necessary to vent some bathrooms fans to the exterior. The gas incentive for this project was \$31,967 with an estimated 28,560 net lifetime therms savings.

Residential ConnectedSolutions

ConnectedSolutions uses active demand reduction strategies to reduce peak electrical demand periods throughout the year. All customers with eligible controllable equipment can enroll to participate in active demand reduction.

Overview of Performance

In 2023, the Company held 18 thermostat events and 28 battery events. 11,240 customers registered for the thermostat measure and 722 customers registered for the battery measure.

Income Eligible Services

Overview

In 2023, the Income Eligible sector was cost-effective, achieving Rhode Island Test benefit-cost ratios of 1.41 for electric programs and 1.74 for gas programs. The Company spent 90% of its electric Income Eligible implementation budget, achieving 89% of target net lifetime electric energy savings and 102% of target electric net annual demand savings. The Company spent 85% of its gas Income Eligible implementation budget and achieved 95% of target gas net lifetime energy savings. More detailed information can be found in Attachment 1 for electric and Attachment 2 for gas.

Income Eligible Program/WAP Collaborative

The Company's Income Eligible Services are administered in collaboration with the Rhode Island Department of Human Services (DHS), the CAP agencies, and other local agencies. This collaboration leverages funds that provide energy services to Income Eligible customers in Rhode Island. The programs discussed below allow more customers to receive comprehensive energy assessments of appliances, weatherization, and heating system replacements.

Low Income Home Energy Assistance Program (LIHEAP)

LIHEAP helps Income Eligible customers meet the increasing costs of home energy and reduces the severity of energy-related crises. LIHEAP is administered by the Rhode Island Department of Human Services (DHS) Individual and Family Support / Community Services Division. LIHEAP intake and outreach is provided by the six local Community Action Program (CAP) agencies. Households are determined eligible for LIHEAP assistance according to income guidelines established by DHS.

Weatherization Assistance Program (WAP)

WAP helps Income Eligible families reduce their energy bills through home energy efficiency. WAP programs also address health and safety concerns. WAP funds improve energy performance of Income Eligible dwellings by leveraging the most advanced technologies and testing protocols. WAP is funded through annual appropriations from the U.S. Department of Energy's WAP and the U.S. Department of Health and Human Services.

Income Eligible Single Family

The Income Eligible Single Family (IES) program helps reduce electricity and heating costs without requiring any customer funding. IES services are delivered by Rhode Island's six local Community Action Program (CAP) agencies. Offerings include behavioral energy assessments, safety / efficiency inspections of the heating and cooling systems, replacement of inefficient / unsafe appliances and heating systems, and inspections of existing insulation for identification of weatherization opportunities. All IES customers receive services and equipment upgrades at no cost.

Overview of Performance

In 2023, the Income Eligible Single Family program achieved 34,471 net lifetime MWh of electric savings (120% of target). The program achieved 94% of its filed electric annual savings goal, while spending 100% of its electric annual budget.

In 2023, the Income Eligible Single Family program achieved 127,822 net lifetime MMBtu of gas savings (76% of target). The program achieved 77% of its filed annual gas savings goal, while spending 82% of its filed annual gas budget.

The lower-than-expected annual gas savings and spend for the Income Eligible Single Family program is driven by the underperforming of two CAP agencies. Blackstone Valley CAP (BVCAP) is responsible for approximately 25% of the Rhode Island Energy discount rate customers. CAP of Providence is responsible for approximately 30% of RI discount rate customers. In 2023, BVCAP met less than 50% of their weatherization goal and only 50% of their heating system replacement goal. BVCAP began experiencing a staffing shortage in early 2023 resulting in a backlog of energy audits. BVCAP is now reliant on outside contractors and RISE to conduct energy audits. CAP of Providence also had staffing issues in 2023 including turnover at the top of the organization. In the second half of 2023, CAP of Providence hired staff and ensured they had the proper training. The new CAP of Providence CEO is addressing the performance challenges and is adopting new policies and procedures to increase productivity. In 2024, RISE will be providing additional capacity to CAP of Providence and Blackstone Valley Equity Zones to ensure all goals are reached.

Highlights

2023 saw multiple enhancements to the program. Most notably, Rhode Island Energy hired an Income Eligible Services Program manager and made the necessary preparations to move to a comprehensive full house audit for weatherization in 2024. CLEAResult (the IES Lead Vendor) has been working with RI Department of Human Services (DHS) to arrange training that will upskill Tier 1, the basic appliance management program (AMP) assessment, program specialists to the comprehensive audit. The Lead Vendor has also continued to improve communication across the Income Eligible Single Family program with assistance from the local appliance vendor (the South Middlesex Opportunity Council) and other local agencies. Key Performance Indicator meetings were held with each CAP and at least one DHS representative. These meetings ensured that the CAPs were aware of their KPI goals, their pace to meet the goals, and provided a dedicated time for constructive dialog.

Income Eligible Multifamily

The Multifamily program serves gas and electric multifamily buildings (5+ dwelling units). The program is available to both market rate, Income Eligible, and C&I customers. Offerings include energy assessments, incentives for heating / domestic hot water systems, cooling equipment, lighting, and appliances.

Overview of Performance

In 2023, the Income Eligible Multifamily program achieved 6,629 net lifetime MWh of electric savings (38% of target). The program achieved 34% of its filed annual electric savings goal, while spending 51% of its filed annual electric budget.

The Income Eligible Multi-Family program lower-than-expected annual electric savings and spend was primarily due to the market for electrical efficiency upgrades at income eligible multi-family properties being near saturation, with much of the sector having already taken advantage of lighting and other electric savings upgrades through the program.

CORRECTED

In 2023, the Income Eligible Multifamily program achieved 194,929 net lifetime MMBtu of gas savings (113% of target). The program achieved 73% of its filed annual gas savings goal, while spending 91% of its filed annual gas budget.

Although the Income Eligible Multi-family program did not meet the annual gas savings target, the lifetime savings achieved (which is the metric used to assess the Lead Vendor's performance) was at 113% of goal. The Income Eligible Multi-family program is buffered from the negative effects of economic concerns seen in the market rate multi-family sector by the fact that most of the cost associated with the installation of energy efficient measures are paid by the Program.

In an effort to increase overall program participation in 2023, the Company's Lead Vendor conducted outreach and follow up communications with Income Eligible multi-family partners with projects in the pipeline and to those that had expressed interest in participation.

Highlights

Below are two examples of projects completed in 2023:

- **Morin Heights – Woonsocket**

This Income Eligible heating boiler project included the installation of a 285 MBH boiler with all pumps and controls, including heat circulators, and DHW indirect water heaters for 33 buildings. The gas incentive for this project is \$793,642 with an estimated 548,350 net lifetime therms savings. The electric incentive is \$85,000 with an estimated 318,505 net lifetime kWh savings.

- **Providence HA Kilmartin**

This Income eligible Variable Refrigerant Flow (VRF) project installed Fujitsu-J5 6-ton condenser, and Fujitsu VFG 7K wall mounted AHUS, as well as Fujitsu wired controls for 30 dwelling units. The electrical incentive for this project was \$549,007 and has an estimated 4,255,146 net lifetime kWh savings.

Commercial and Industrial Programs

Overview

In 2023, the Commercial and Industrial (C&I) sector was cost-effective, achieving Rhode Island Test benefit-cost ratios of 1.67 for electric programs and 4.16 for gas programs. The Company spent 102% of its electric C&I implementation budget, achieving 94% of target net lifetime electric energy savings and 79% of target electric net annual demand savings. The Company spent 84% of its gas C&I implementation budget and achieved 80% of target gas net lifetime energy savings. More detailed information can be found in Attachment 1 for electric and Attachment 2 for gas.

Large Commercial and Industrial New Construction

The Large C&I New Construction program supports energy efficiency in new construction, major renovations, planned replacement of aging equipment, and replacement of failed equipment through financial incentives and technical assistance to developers, manufacturers, vendors, customers, and design professionals.

Overview of Performance

In 2023, the Large C&I New Construction program achieved 126,976 net lifetime MWh of electric savings (81% of target). The program achieved 82% of its filed annual electric savings goal, while spending 84% of its filed annual electric budget.

The lower-than-expected annual electric savings and spend can largely be attributed to the underperformance of Process and Lighting related installations. The Company did not make any adjustments to its Annual Plan programming during 2023 because of the challenges of impacting construction schedules, the design process, and permitting with New Construction projects.

In 2023, the Large C&I New Construction program achieved 689,302 net lifetime MMBtu of gas savings (96% of target). The program achieved 108% of its filed annual gas savings goal, while spending 139% of its filed annual gas budget.

The overperformance in annual gas savings and spend can largely be attributed to increased savings and incentives for upstream Food Service and Hot Water offerings. The promotion resulted in a greater than expected uptake in upstream Food Service and Hot Water measure, which drove higher savings and spending for the Gas New Construction Sector. In the 2024 Plan, the Company has reduced upstream Food Service and Hot Water related savings and spend to account for the 2024 IECC code impacts.

Highlights

In 2023, the Company worked with customers and their vendors on 95 new construction and major renovation projects.

- New construction projects involving schools and universities included:
 - Middletown High School
 - Bryant University Dining Hall and Convocation and Arena for Athletics

- Central Falls Elementary School and High School
- Fogarty Memorial Elementary in North Scituate
- Johnston Public Schools
- Roger Williams University.

Large Commercial and Industrial Retrofit

The Large C&I Retrofit Program provides incentives for the replacement of existing equipment and systems with energy-efficient alternatives when the customer might otherwise not plan on making efficiency investments.

Overview of Performance

In 2023, the Large C&I Retrofit program achieved 259,740 net lifetime MWh of electric savings (106% of target). The program achieved 108% of its filed annual electric savings goal, while spending 121% of its filed annual electric budget.

The overperformance can be attributed to greater than expected savings from lighting, process, and motor and drive measure installations. The Large C&I Retrofit process, and motor and drive measures have a higher cost per kWh saved than the portfolio average, which resulted in the Retrofit program exceeding its planned budget. The Company adjusted incentive levels in 2023 to support the achievement of the filed Commercial and Industrial Sector savings goal.

In 2023, the Large C&I Retrofit program achieved 691,972 net lifetime MMBtu of gas savings (68% of target). The program achieved 67% of its filed annual gas savings goal, while spending 57% of its filed annual gas budget.

The underperformance can be attributed to lower-than-expected savings and spend from Process and HVAC related measures. The Company anticipates that additional Process and HVAC savings will be realized in 2024 due to the ramping up of the Energy Management System and Building Analytic Program offerings which often result in increased savings from both HVAC and Process related end-uses.

Highlights

Industrial Initiative

Below are three examples of projects completed through the Industrial Initiative:

- An industrial customer added two inches of fiberglass insulation to six uninsulated 10,000-gallon steel tanks, which is expected to save 42,500 kWh per year or approximately a 5% reduction of their total annual usage.
- An industrial customer operating a large warehouse area that shares space with other conditioned rooms (temperature and humidity for product quality) worked with Leidos (the program's Lead Vendor) to identify an energy conservation measure that amounts to over 14,700 therms of annual savings.

- A manufacturing customer installed new compressors to increase plant productivity and meet increased product demand. Energy savings are being realized from the improved air compressor efficiency, better part load operation of the new VSD compressor compared with the baseline compressor (load/no load), and improved dryer operation.

Strategic Energy Management Partnership

Rhode Island Energy has a total of 12 Strategic Energy Management Partnership (“SEMP”) partners including two public entities, six colleges and universities, an industrial park, a healthcare provider, and two large retail businesses. Since 2013, a total of 825+ energy efficiency projects have been implemented by Rhode Island Energy and its SEMP partners.

EnergySmart Grocer Initiative

Below are four examples of projects completed through the EnergySmart Grocer Initiative:

- Grocer Coil Cleaning: A large grocery chain proceeded with retro-commissioning measures through Rhode Island Energy’s Equipment & Systems Performance Optimization (“ESPO”) program. The rooftop unit and condenser coils across the customer’s 26 stores in Rhode Island were cleaned, resulting in approximately 700,000 kWh of energy savings and \$16,000 in rebates.
- A grocery store chain implemented Monitoring Based Commissioning (“MBCx”) energy efficiency improvements in four stores in Rhode Island. The work is being staged in two “phases,” with the first phase occurring in Q3 2023 and the second phase planned for 2024. Total project savings are estimated at 270,000 kWh.
- Remodeling projects were completed at two locations of a Rhode Island grocery store chain including the upgrades of self-contained cases, night covers, de-stratification fans, lids on coffin cases, and addition of doors to existing cases. Combined savings from these remodels total 80,894 kWh and 7,853 therms.
- A Rhode Island grocery store participated in a refrigeration leak detection and repair study, resulting in leak repairs on two refrigeration racks. These repairs saved 5,785 kWh

Commercial ConnectedSolutions

ConnectedSolutions uses active demand reduction strategies to reduce peak electrical demand periods throughout the year. All customers with eligible controllable equipment can enroll to participate in active demand reduction.

Overview of Performance

During the 2023 season, the Company held 25 daily dispatch events, three targeted dispatch events, and three combined daily and targeted dispatch events for a total of 31 C&I ConnectedSolutions events. The program saw about 25.4 MW and 54.3 MW in total contracted average load shed for daily dispatch and targeted dispatch, respectively.

Small Business Direct Install Program

The Company's Small Business Direct Install program provides turnkey services to customers that consume less than 1,500 MWh per year. As part of the program, customers receive a free on-site energy assessment and a customized report detailing recommended energy efficiency actions. The Company then completes retrofit installations at the customer's convenience.

Overview of Performance

In 2023, the Small Business Direct Install program achieved 47,842 net lifetime MWh of electric savings (83% of target). The program achieved 70% of its filed annual electric savings goal, while spending 72% of its filed annual electric budget.

The underperformance in program savings and spend in the program was partly attributable to a drop off in projects from independent vendors. The program Lead Vendor seeks to address this in 2024 with increased outreach to independent electricians and vendors that are serving customers eligible for the Small Business Direct Install program. In addition, savings from lighting was approximately 20% lower than originally planned while motor/drive actual savings were greater than originally planned for. The Company added additional non-lighting measures (e.g., transformer) and focused on other end uses (e.g., heat pump installations in businesses using electric resistance heat) in 2023, and into 2024, to minimize the impacts of the transition from lighting end uses. The Company adjusted incentives in 2023 in response to these variances.

In 2023, the Small Business Direct Install program achieved 82,957 net lifetime MMBtu of gas savings (64% of target). The program achieved 85% of its filed annual gas savings goal, while spending less than 50% of the filed annual gas budget.

The lower-than-expected gas savings and spend can be attributed to the installation of direct install gas measures such as low flow showerheads, which have a lower cost per therm saved than other gas efficiency measures.

Highlights

Below are several examples of projects completed through the Small Business Direct Install Program:

- A private non-profit agency installed LED flat panel fixtures and Wi-Fi thermostats with temperature sensors that help them balance the temperature throughout the facility, saving 70,035 kWh and 476 therms.
- A private country club installed custom LED flat panels throughout the building allowing the customer the ability to change the light level with the built-in integrated controls, saving 56,040 kWh.
- A sports facility installed high performance LED high bays and upgraded their HVAC/VFD system, saving 158,000 kWh.

- A Main Street event in Central Falls resulted in 29 audits, of which 20 converted to installation of energy efficient equipment in micro-businesses, saving a total of 84,951 kWh.
- An assisted senior living facility had energy efficiency lighting installed and demand circulators upgraded, saving approximately 150,000 kWh and 4,000 therms.

Commercial and Industrial Multifamily

The Multifamily program serves gas and electric multifamily buildings (5+ dwelling units). The program is available to both market rate, Income Eligible, and C&I customers. Offerings include energy assessments, incentives for heating / domestic hot water systems, cooling equipment, lighting, and appliances.

Overview of Performance

In 2023, the C&I Multifamily program achieved 68,959 net lifetime MMBtu of gas savings (107% of target). The C&I Multifamily Program achieved 68% of its field annual gas savings goal, while spending 77% of its filed annual gas budget.

Although the program had lower-than-expected annual savings and spend, the lifetime savings achieved (which is the metric used to assess the Lead Vendor's performance) was at 107% of goal. A high number of relatively low-cost measures helped drive savings above 100% while reducing impacts on the budget.

Cross Cutting Programs and Support Services

Codes and Standards

The Codes and Standards Technical Support initiative (CSTS) provides targeted stakeholder outreach and technical guidance to increase compliance with minimum energy efficiency policies and requirements. The Company has continued to expand its energy code compliance support services to a variety of stakeholder groups.

Highlights

In 2023, the Code Compliance Enhancement Initiative (CCEI) conducted 61 training events across the state with 990 total attendees. 53 of these were residential trainings (743 total attendees), while 9 of these were commercial trainings (247 total attendees). Rhode Island Energy partnered with several local organizations to promote and deliver trainings, including the Rhode Island Builders Association, the Rhode Island Association of Realtors, and the American Institute of Architects – Rhode Island. CCEI also launched a 20-week Residential Construction pre-apprentice training course funded through the RI Department of Labor and Training and Rhode Island Builders Association and offered through the Residential Construction Workforce Partnership. The course provided the basic skills and training needed for entering a career in energy efficiency, including soft skills, introduction to building science, weatherization, and HVAC.

Community Based Initiative

The Community Based Initiative is an energy efficiency awareness campaign that drives energy efficiency (EE) program participation by engaging with residents, small businesses, and local officials. Initially, the Company works directly with municipalities to set EE program goals. The municipalities then work to achieve said goals by recruiting volunteers and conducting outreach at local public events. Throughout the initiative, the Company provides numerous services such as monthly progress reports and customized outreach materials. At the end of each year, the municipalities earn grants for achieving certain percentages of the identified EE goals. These grants are then used to fund municipal EE projects and/or community-based educational EE programs.

Highlights

In 2023, Rhode Island Energy conducted its small business coordination by working with the Office of Planning and Economic Development and the Chamber of Commerce to help promote the initiative and to help identify potential customer leads. The Company also worked with the Department of Public Works to prioritize buildings based on energy use intensity (EUI) and began performing energy assessments of high priority buildings. In the second quarter, Rhode Island Energy implemented initiatives for underserved communities and delivered 20 new projects under the Main Street program in East Providence. These projects included both Minority Owned and Women Owned businesses. The Lead Vendor expects continued success in these markets as it added an internal “lead generation” employee in 2023. The employee received extensive training on identifying new opportunities and assisting Energy Specialists.

Equity

In 2023, the Company continued its focus on serving all customers equitably. Rhode Island Energy strives to break down program participation barriers so that all Rhode Islanders – regardless of race, income, gender, ability, or other aspects of social status – can access and benefit from energy efficiency.

The Company continued its work with the Equity Working Group (EWG), in its third year, to identify opportunities to integrate the principles of diversity, equity, and inclusion in Rhode Island Energy Efficiency Programs. The 2023 EWG was comprised of thirty-three stakeholders, representing a variety of backgrounds and experience, and met four times starting in June 2023.

Throughout the year, the Company focused its efforts on several equity priorities, including those recommended by the Equity Working Group. Those recommendations and the Company’s resulting actions are listed below:

| Rhode Island Energy Efficiency Equity Working Group (EWG) Recommendations for 2023 |
|--|
| 1. Promote energy efficiency at community gathering places and events |
| In 2023, the Company took several actions to promote energy efficiency at community gathering places and events. Actions included coordinating the Rhode Island Home Show, hiring and involving additional staff to support the promotion of energy efficiency at community gatherings (e.g., the Non-Violence Institute Resource Fair in Providence), and conducting energy efficiency marketing and outreach at Customer Assistance Expos across the state (e.g. Expo at Woonsocket Public Library). |
| 2. Provide enhanced outreach, promotion, and education of all energy efficiency offerings in underserved communities |
| The Company continued to train Energy Efficiency Customer Advocates to conduct targeted education and outreach in underserved communities. Rhode Island Energy held or attended community events in Central Falls, Woonsocket, Providence, East Providence, and Pawtucket. |
| 3. Partner with and cross train other home visiting programs and other community organizations/resource groups to expand the reach and impact of Rhode Island Energy’s energy efficiency programs |
| Rhode Island Energy partnered with Ocean State Center for Independent Living to conduct a home visiting program. It also partnered with several community organizations (e.g., Progreso Latino) to expand the reach and impact of its energy efficiency programs |
| 4. Continue to explore opportunities to support innovative education programs, helping to revitalize neighborhoods and fostering the development of the future workforce |

In 2023, the Company supported The Rhode Island Builders Association's Residential Construction Workforce Partnership with \$40,000 in training funding.

5. Develop recruitment material and explore opportunities for participation in local career fairs and partnerships with local trade schools, vocational programs, and community organizations

The Company recruited at a Community Job Fair hosted by the Northern Rhode Island Chamber of Commerce in partnership with the Rhode Island Hispanic Chamber of Commerce, the City of Central Falls, and Rhode Island College. It also attended the Veterans Affairs Career Fair.

6. Complete an internal needs assessment across all departments to determine opportunities for internships, mentorships, or job shadowing

The Company completed a Workforce Needs Assessment.

In addition to the equity work and achievements highlighted above, the Company kicked off efforts in Q4 2023 to select outcome-based equity metrics to begin tracking and reporting on in 2024. These metrics will provide greater transparency into how Rhode Islanders are served by the Company's energy efficiency programs, and they will allow for the opportunity to better understand and address barriers to participation that may exist.

Demonstrations, Pilots, and Assessments

In 2023, the Company continued or started eight demonstrations, pilots, or assessments. The Company updated the EERMC and PUC of the progress, findings, and next steps of all demonstrations, pilots, and assessments in the 2023 Quarterly Reports.

| Pilot, Demonstration, or Assessment | Objectives | Findings | Next Steps |
|--|--|--|--|
| Final Gas Appliances-Assessment-Residential | Assess opportunities for electric appliances at new homes | Study report finalized | Apply study results to program design |
| Gas Demand Response- Pilot-C&I | Test supply and/or distribution system benefits, reduction of gas system peak demand via a reduction in overall natural gas consumption, customer adoption of gas DR and incentive levels to drive participation | Winter season concluded | Analyze winter results |
| Gas Leak Survey-Demonstration-C&I | Investigate the program potential of providing customers with gas leak detection and repair services | Working with vendors to determine savings calculation assumptions and post-verification procedures | Test post-verification procedures at sites |
| Rightsizing RTUs-Assessment- C&I | Explore developing an approach for identifying rightsizing opportunities and estimating incremental savings through rightsizing equipment | Completed assessment, which identified strategies for RTU right-sizing | Integrate strategies into program design and implementation |
| Automated RTU Optimization-Demonstration-C&I | Examine the effectiveness of automated systems optimization for smaller customers with 2 or more RTUs | Evaluation report completed | Integrate strategies into program design and implementation |
| Commercial Weatherization-Assessment- C&I | Explore cost-effective opportunities to expand on historical weatherization efforts | Completed training with vendors, gathering feedback and conducting research for development | Develop express tool |
| Air Curtains-Demonstration-C&I | Review similar air curtains measures in other regions, and develop / demonstrate a RI-specific offering | Opted to develop measure offering, in line with MA PAs | Collaborate with MA, develop program offering, and develop go-to-market plan |
| Smart Valves for Chilled Water Systems-Demonstration-C&I | Demonstrate smart valves for chilled water systems. Recruit customers, monitor installed systems, develop analysis framework, and assess savings / cost-effectiveness | Final report submitted | Review report and develop plan on next steps |

Rhode Island Comprehensive Marketing

The Company's robust, comprehensive marketing campaigns boost awareness, interest, and participation in energy efficiency programming. Specifically, the Company focuses its messaging on affordability, comfort, safety, and customer segment specific energy efficiency solutions.

The Company's communication plan has two main elements: an education campaign and a program-specific campaign. The education campaign highlights pathways for customers to save energy and money with the Company's portfolio of products. Marketing outreach includes video, bill inserts, e-mail, radio (terrestrial and digital), digital ads, and social media (Facebook, Instagram, and Twitter). The program-specific campaign focuses on increasing participation within specific programs. Marketing channels include e-mail, direct mail, bill inserts, radio, and social media. The Company is committed to providing e-mail and direct mail for residential customers with options to read in Spanish and Portuguese.

Financing

Since 2011, the Company has managed several revolving loan funds that allow customers to finance energy efficiency projects using their monthly energy bills. The funds help relieve pressure on the Energy Efficiency Program charge by reducing incentive budgets. In 2014, the Company began managing a revolving loan fund for state and municipal customers as part of the Rhode Island Public Energy Partnership (RI PEP). RI PEP resources have since been redirected into the Efficient Buildings Fund. In 2015, the Company extended opportunities for gas projects through the large C&I gas revolving loan fund. Please see tables E-6 and G-6 in Attachments 1 and 2 for more details.

Efficient Buildings Fund (EBF)

Since 2015, the Company, the Rhode Island Office of Energy Resources, and the Rhode Island Infrastructure Bank (RIIB) have leveraged system benefit charge funds to drive energy improvements in facilities across Rhode Island. A \$5 million transfer was made for 2023 (Docket No. 22-33-EE).

Large C&I Revolving Loan Fund

Through the electric large C&I revolving loan fund, the Company offered \$4.65 million through 532 loans in on-bill financing to 379 large commercial customers. At the end of 2023, the fund had a balance of \$12.86 million (including committed 2023 dollars).

Through the gas large C&I revolving loan fund, the Company offered \$0.12 million through 18 loans to 13 large commercial customers. At the end of 2023, the fund had a balance of \$1.17 million (including committed 2023 dollars).

Small Business Revolving Loan Fund

All Small Business Direct Install program participants receive financing to cover 30% of project costs, either over 24 months at 0% interest or a lump sum payment with a 15% discount. Through the small business revolving loan fund, the Company offered \$0.69 million in loans to 427 small business customers. At the end of 2023, the fund had a balance of \$4.12 million.

Commercial Property Assessed Clean Energy (C-PACE):

Since the program was adopted in Rhode Island in 2015, 34 projects have been completed, totaling over \$115 million in energy efficiency and renewable energy for businesses. Outreach by the Rhode Island Infrastructure Bank and the Company will continue in 2024.

Ascentium

The Company works with Ascentium Capital (a leading specialty financing firm in equipment and technology financing solutions) to offer customers alternative financing options for energy efficiency projects. A simple approval loan process allows customers to use their incentive to buy down interest on loans (typically to 0% depending on the term) for up to \$250,000.

HEAT Loan

The HEAT loan provides qualified residential customers with 0% financing for upfront costs associated with energy efficiency upgrades. The HEAT loan also spreads the upfront costs over multiple years. The EnergyWise, Multifamily, HVAC, and Connected Solutions programs pay the negotiated interest for the customer cost portion of the loan. The Capital Good Fund (the lender of last resort) provides financing to customers with less than perfect credit. There were 913 loans processed in 2023 totaling approximately \$9.53 million in financing towards project costs.

Evaluation, Measurement and Verification Studies

The Company hires third party consulting firms to regularly conduct program evaluations as part of its measurement and verification process. These evaluations include engineering analysis, metering analysis, billing analysis, site visits, surveys, and market studies to calculate the actual program-delivered energy savings. Final reports and one-page graphical summaries of completed evaluations can be found on the Energy Efficiency Resource Management Council's website.

In 2023, 10 evaluation studies were completed. At the end of 2023, five evaluation studies were still in progress. Summaries for the completed studies may be found in Attachment 3.

Residential Evaluation Studies

- Residential New Construction and Code Compliance Study (completed)
- EnergyWise Single Family Weatherization Impact Evaluation (completed)
- Participation Study Dashboard Update (completed, no summary available)
- Residential Nonparticipant Characterization and Segmentation Research (in progress)

C&I Evaluation Studies

- Impact Evaluation of PY2021 Custom Gas Installations (completed, no summary available)
- Impact Evaluation of PY2021 Custom Electric Installations (completed, no summary available)
- Small Business Process Evaluation (completed)
- Rhode Island Commercial Food Service Equipment ISP (completed)
- C&I Free-Ridership and Spillover Study (completed)
- Impact Evaluation of PY2022 Custom Gas Installations (in progress)
- Impact Evaluation of PY2022 Custom Electric Installations (in progress)
- C&I New Construction Baseline Study (in progress)
- Automated RTU Optimization Demonstration Evaluation (in progress)

Cross-Cutting Evaluation Study

- Rhode Island Energy Efficiency Workforce Development Needs Assessment (completed, no summary available)
- Comprehensive Measure Life Review (completed)

Indicators of Performance

Cost Schedules

Attachments 1a and 2a provide an additional level of granularity to the Company's energy efficiency program spending. In addition to Attachments 1a and 2a (which are non-confidential), the Company will file confidential vendor schedules that detail costs to individual vendors and other external entities. These confidential schedules were developed in collaboration with the Division through a Non-Disclosure Agreement. The Company is filing these confidential schedules with a motion for protective treatment.

Performance Metrics

Lifetime MWh and MMBtu Savings

The Company sets its primary energy savings goals in lifetime units.

Program Cost per Energy Savings

Program cost per energy savings has been used since 2019. The Company will continue to use this metric to report / evaluate program performance.

Peak Hour Gas Demand Savings

The Company tracks an estimate of peak-hour gas demand savings based on relationships between annual, peak day, and peak hour gas consumption. The Company acknowledges that this estimate is a rough approximation of peak-hour gas demand impacts. Currently, the National Grid Rhode Island Gas End Use Consumption Study (prepared by Guidehouse, Inc.) is used to update this metric.¹

Carbon Reductions

The Company includes a carbon reduction metric in quarterly reporting. This metric takes sector-level annual electric, gas, oil, and propane savings and converts them to short tons of CO₂ using emissions factors from the 2021 AESC.²

Jobs Impacts

The Company has estimated the number of full-time equivalent (FTE) employees engaged in all aspects of EE programs where the Company provided funding support in 2023. The FTE estimate covers a wide range of EE services, including independent contractors and plumbers, rebate processors, engineers, and The Company's staff, and was determined by adjusting the number of FTEs identified in the 2021 study of workforce impacts³ by the ratio of inflation-adjusted spending in 2023 to 2021.

Based on this analysis, 749 full-time equivalent (FTE) employees had work supported by the Company's investments in energy efficiency programs in 2023, and 626 organizations and agencies were

¹ "National Grid RI Gas End-Use Consumption Study," June 10, 2021, accessed at <http://rieermc.ri.gov/wp-content/uploads/2021/07/ri-gas-end-use-consumption-study-final-2021-06-18-final.pdf>

² Appendix G, Table 171. https://www.synapse-energy.com/sites/default/files/AESC%202021_20-068.pdf

³ "Rhode Island 2021 Energy Efficiency Workforce Analysis -Final Report," May 31, 2022, accessed at <http://rieermc.ri.gov/wp-content/uploads/2023/05/rhode-island-2021-ee-workforce-analysis-final-report-clean-05-31-22.pdf>

involved in the Company's 2023 energy efficiency programs, 68% of which were in Rhode Island. A complete list of businesses is included as Attachment 5.

Shareholder Incentive

The PIM Framework remains unchanged from 2022. Please see PUC Order No. 24225 and Rhode Island Energy's 2023 Energy Efficiency Plan (Docket 22-33, Bates page 98) for more details on the PIM Framework. The design-level performance incentive payouts and maximum service quality adjustments (SQA) were adjusted to reflect planned performance. Please see Table 4C in Attachments 1 and 2 for detailed calculations of 2023 PIM results.

Performance Incentive Payout

| Fuel | Sector | Design-Level Incentive | Earned Incentive |
|----------|-----------------|------------------------|------------------|
| Electric | Residential | \$658,315 | \$176,295 |
| | Income Eligible | \$500,000 | \$0 |
| | C&I | \$2,700,846 | \$2,277,417 |
| Gas | Residential | \$500,000 | \$0 |
| | Income Eligible | \$500,000 | \$0 |
| | C&I | \$792,002 | \$614,737 |

Service Quality Adjustment

| Fuel | Sector | Maximum SQA | Earned SQA |
|----------|-----------------|-------------|------------|
| Electric | Residential | N/A | N/A |
| | Income Eligible | \$333,628 | \$41,958 |
| | C&I | N/A | N/A |
| Gas | Residential | \$333,102 | \$173,223 |
| | Income Eligible | \$123,176 | \$43,741 |
| | C&I | N/A | N/A |

Total Sector Earnings

| Fuel | Sector | Net Earnings |
|----------|-----------------|--------------|
| Electric | Residential | \$176,295 |
| | Income Eligible | -\$41,958 |
| | C&I | \$2,277,417 |
| Gas | Residential | -\$173,223 |
| | Income Eligible | -\$43,741 |
| | C&I | \$614,737 |

Attachment 1 (Corrected)

Electric Summary Table of Year-End Results

Table E-1
 Rhode Island Energy
 Summary of 2023 Energy Efficiency Target and Year-End Results

| | (a) (b) (c) | | | (d) (e) (f) | | | (g) (h) (i) | | | (j) (k) (l) | | | (m) (n) (o) | | | (p) (q) | | |
|--|---------------|---------------|---------------|---------------|---------------|--------------|----------------|----------------|---------------|----------------|----------------|---------------|-------------------|-------------------|---------------|----------------|----------------|--|
| | Target | Actual | % Achieved | Target | Actual | % Achieved | Target | Actual | % Achieved | Target | Actual | % Achieved | Target | Actual | % Achieved | Target | Actual | |
| Residential | | | | | | | | | | | | | | | | | | |
| Residential New Construction | 16 | 69 | 440.8% | 689 | 567 | 82.2% | 13,144 | 10,324 | 78.5% | 410 | 470 | 114.7% | \$1,592.0 | \$1,005.5 | 63.2% | \$0.121 | \$0.097 | |
| Residential HVAC | 640 | 212 | 33.1% | 4,175 | 5,702 | 136.6% | 71,055 | 98,697 | 138.9% | 6,371 | 5,796 | 91.0% | \$5,340.8 | \$5,339.5 | 100.0% | \$0.075 | \$0.054 | |
| EnergyWise Single Family | 466 | 404 | 86.8% | 3,147 | 2,386 | 75.8% | 16,940 | 15,596 | 92.1% | 9,465 | 11,710 | 123.7% | \$15,585.3 | \$15,666.8 | 100.5% | \$0.920 | \$1.005 | |
| EnergyWise Multifamily | 108 | 43 | 39.6% | 680 | 323 | 47.6% | 9,493 | 3,466 | 36.5% | 1,744 | 666 | 38.2% | \$1,341.2 | \$845.7 | 63.1% | \$0.141 | \$0.244 | |
| Home Energy Reports | 3,348 | 3,566 | 106.5% | 24,350 | 25,932 | 106.5% | 24,350 | 25,932 | 106.5% | 276,390 | 242,231 | 87.6% | \$2,145.8 | \$2,285.6 | 106.5% | \$0.088 | \$0.088 | |
| Residential Consumer Products | 885 | 515 | 58.2% | 4,473 | 2,131 | 47.6% | 31,684 | 15,024 | 47.4% | 26,274 | 10,801 | 41.1% | \$2,489.1 | \$1,811.2 | 72.8% | \$0.079 | \$0.121 | |
| Residential ConnectedSolutions | 7,878 | 7,310 | 92.8% | | | | | | | 6,900 | 11,962 | 173.4% | \$1,963.1 | \$3,381.9 | 172.3% | | | |
| Comprehensive Marketing - Residential | | | | | | | | | | | | | \$310.5 | \$337.4 | 108.7% | | | |
| Community Based Initiatives - Residential | | | | | | | | | | | | | \$280.6 | \$0.0 | 0.0% | | | |
| Residential Pilots | | | | | | | | | | | | | \$0.0 | \$0.0 | 0.0% | | | |
| Subtotal | 13,340 | 12,119 | 90.8% | 37,513 | 37,041 | 98.7% | 166,665 | 169,039 | 101.4% | 327,554 | 283,635 | 86.6% | \$31,048.3 | \$30,673.6 | 98.8% | \$0.186 | \$0.181 | |
| Income Eligible Residential | | | | | | | | | | | | | | | | | | |
| Income Eligible Single Family | 367 | 444 | 120.9% | 2,801 | 2,628 | 93.8% | 28,796 | 34,471 | 119.7% | 3,111 | 4,616 | 148.4% | \$13,141.5 | \$13,124.8 | 99.9% | \$0.456 | \$0.381 | |
| Income Eligible Multifamily | 90 | 22 | 24.6% | 1,298 | 437 | 33.7% | 17,632 | 6,629 | 37.6% | 2,786 | 1,420 | 51.0% | \$3,335.8 | \$1,713.5 | 51.4% | \$0.189 | \$0.258 | |
| Subtotal | 457 | 466 | 102.0% | 4,099 | 3,065 | 74.8% | 46,427 | 41,100 | 88.5% | 5,897 | 6,036 | 102.4% | \$16,477.3 | \$14,838.3 | 90.1% | \$0.355 | \$0.361 | |
| Commercial & Industrial | | | | | | | | | | | | | | | | | | |
| Large C&I New Construction | 1,306 | 974 | 74.6% | 10,481 | 8,563 | 81.7% | 157,598 | 126,976 | 80.6% | 45 | 52 | 114.7% | \$8,269.2 | \$6,974.7 | 84.3% | \$0.052 | \$0.055 | |
| Large C&I Retrofit | 6,143 | 5,860 | 95.4% | 35,260 | 38,245 | 108.5% | 244,962 | 259,740 | 106.0% | 2,142 | 2,766 | 129.1% | \$22,176.2 | \$26,793.5 | 120.8% | \$0.091 | \$0.103 | |
| Small Business Direct Install | 708 | 1,030 | 145.4% | 9,260 | 6,486 | 70.0% | 57,778 | 47,842 | 82.8% | 339 | 328 | 97.0% | \$7,552.2 | \$5,402.6 | 71.5% | \$0.131 | \$0.113 | |
| Commercial ConnectedSolutions | 36,000 | 26,973 | 74.9% | | | | | | | 216 | 139 | 64.4% | \$5,666.8 | \$5,626.3 | 99.3% | | | |
| C&I Financing | | | | | | | | | | | | | \$2,000.0 | \$2,000.0 | 100.0% | | | |
| Community Based Initiatives - C&I | | | | | | | | | | | | | \$93.5 | \$14.0 | 15.0% | | | |
| Commercial Pilots | | | | | | | | | | | | | \$0.0 | \$0.0 | 0.0% | | | |
| Commercial Workforce Development | | | | | | | | | | | | | \$157.5 | \$9.3 | 5.9% | | | |
| Subtotal | 44,157 | 34,836 | 78.9% | 55,001 | 53,294 | 96.9% | 460,338 | 434,558 | 94.4% | 2,741 | 3,285 | 119.8% | \$45,915.5 | \$46,820.5 | 102.0% | \$0.100 | \$0.108 | |
| Portfolio | | | | | | | | | | | | | | | | | | |
| EERMC | | | | | | | | | | | | | \$594.3 | \$574.5 | 96.7% | | | |
| ORER | | | | | | | | | | | | | \$891.4 | \$891.4 | 100.0% | | | |
| Electric Resistance to Heat Pump Conversions | | | | | | | | | | | | | \$409.3 | \$409.3 | 100.0% | | | |
| Rhode Island Infrastructure Bank | | | | | | | | | | | | | \$3,737.5 | \$3,737.5 | 100.0% | | | |
| Subtotal | | | | | | | | | | | | | \$5,632.4 | \$5,612.6 | 99.6% | | | |
| Grand Total | 57,954 | 47,421 | 81.8% | 96,613 | 93,400 | 96.7% | 673,430 | 644,697 | 95.7% | 336,192 | 292,956 | 87.1% | \$99,073.5 | \$97,945.0 | 98.9% | \$0.147 | \$0.152 | |

Note: electric resistance to heat pump conversions portfolio costs are unspent funds that will appear in the fund balance and are not altered during the year.

CORRECTED

Table E-2
Rhode Island Energy
Summary of 2023 Energy Efficiency Benefits by Program

| | (a) | (b) | (c) | | (d) | | (e) | | (g) | (h) | (j) | | | (m) | (n) | (o) | | (q) | (r) | | (t) | | |
|---------------------------------------|------------------|------------------|---------------------------|----------------|-----------------|-----------------|-----------------|----------------------|----------------|----------------|-------------------|---------------|---------------|-----------------|----------------|-----------------|-----------------|--------------|--------------|------------------|-----|----------------|--------------|
| | | | Total (Economic Excluded) | Energy | | | | Electric Energy DRPE | | | Capacity | | | | | Non Electric | | | | Societal | | | |
| | | | | Peak | Off Peak | Peak | Off Peak | | | | Summer Generation | Capacity DRPE | Transmission | | | Distribution | Reliability | | Natural Gas | Oil | | Other Resource | Non Resource |
| 1 Residential | | | | | | | | | | | | | | | | | | | | | | | |
| Residential New Construction | \$4,636 | \$3,067 | \$43 | \$37 | \$322 | \$436 | \$226 | \$90 | \$56 | \$178 | \$224 | \$1 | \$23 | \$0 | \$972 | \$26 | \$422 | \$10 | \$0 | \$1,569 | | | |
| Residential HVAC | \$25,348 | \$16,912 | \$230 | \$196 | \$1,239 | \$4,215 | \$2,337 | \$175 | \$170 | \$363 | \$455 | \$2 | \$64 | \$1,718 | \$0 | \$391 | \$3,235 | \$123 | \$0 | \$8,636 | | | |
| EnergyWise Single Family | \$34,536 | \$18,086 | \$231 | \$200 | \$330 | \$339 | \$341 | \$189 | \$217 | \$400 | \$501 | \$3 | \$3 | \$11,069 | \$279 | \$826 | \$1,790 | \$420 | \$0 | \$16,450 | | | |
| EnergyWise Multifamily | \$2,206 | \$980 | \$62 | \$51 | \$87 | \$104 | \$79 | \$34 | \$25 | \$67 | \$84 | \$0 | \$0 | \$3 | \$8 | \$259 | \$115 | \$2 | \$0 | \$1,226 | | | |
| Home Energy Reports | \$8,722 | \$6,185 | \$252 | \$195 | \$652 | \$559 | \$572 | \$337 | \$961 | \$390 | \$489 | \$66 | \$0 | \$0 | \$0 | \$0 | \$1,792 | \$20 | \$0 | \$2,517 | | | |
| Residential Consumer Products | \$6,565 | \$3,576 | \$312 | \$196 | \$257 | \$268 | \$419 | \$164 | \$402 | \$330 | \$476 | \$5 | \$0 | \$3 | \$0 | \$31 | \$773 | \$111 | \$0 | \$2,988 | | | |
| Subtotal | \$82,012 | \$48,806 | \$1,029 | \$875 | \$4,886 | \$5,912 | \$3,994 | \$888 | \$1,833 | \$1,779 | \$2,229 | \$76 | \$89 | \$12,791 | \$1,212 | \$1,503 | \$9,127 | \$586 | \$0 | \$33,207 | | | |
| 9 Income Eligible Residential | | | | | | | | | | | | | | | | | | | | | | | |
| Income Eligible Single Family | \$32,076 | \$19,476 | \$432 | \$443 | \$784 | \$851 | \$732 | \$295 | \$318 | \$617 | \$773 | \$4 | \$40 | \$3,286 | \$791 | \$8,130 | \$1,833 | \$147 | \$0 | \$12,600 | | | |
| Income Eligible Multifamily | \$3,567 | \$1,339 | \$33 | \$18 | \$99 | \$131 | \$83 | \$17 | \$16 | \$36 | \$45 | \$0 | \$0 | \$0 | \$3 | \$107 | \$2 | \$750 | \$0 | \$2,228 | | | |
| Subtotal | \$35,642 | \$20,815 | \$465 | \$462 | \$883 | \$982 | \$815 | \$313 | \$334 | \$652 | \$817 | \$4 | \$40 | \$3,286 | \$794 | \$8,133 | \$1,835 | \$149 | \$750 | \$14,827 | | | |
| 12 Commercial & Industrial | | | | | | | | | | | | | | | | | | | | | | | |
| Large C&I New Construction | \$42,637 | \$23,527 | \$2,159 | \$1,432 | \$3,164 | \$2,160 | \$2,972 | \$741 | \$782 | \$1,548 | \$1,938 | \$9 | \$122 | -\$18 | \$0 | \$2,581 | \$4,113 | \$68 | \$0 | \$19,111 | | | |
| Large C&I Retrofit | \$205,531 | \$64,061 | \$4,514 | \$2,811 | \$5,077 | \$3,381 | \$7,969 | \$1,865 | \$4,601 | \$4,328 | \$5,421 | \$56 | -\$312 | -\$454 | \$0 | \$11,556 | \$13,111 | \$137 | \$0 | \$141,470 | | | |
| Small Business Direct Install | \$18,056 | \$9,799 | \$731 | \$396 | \$713 | \$1,485 | \$712 | \$1,485 | \$364 | \$826 | \$1,040 | \$10 | -\$209 | -\$9 | \$0 | \$271 | \$2,159 | \$15 | \$0 | \$8,266 | | | |
| Subtotal | \$266,224 | \$97,378 | \$7,404 | \$4,638 | \$9,299 | \$6,254 | \$12,425 | \$2,978 | \$6,209 | \$6,796 | \$8,408 | \$75 | -\$623 | -\$488 | \$0 | \$14,408 | \$19,383 | \$221 | \$0 | \$168,846 | | | |
| 18 Grand Total | \$383,879 | \$166,998 | \$8,897 | \$5,975 | \$15,168 | \$13,147 | \$17,235 | \$4,171 | \$8,373 | \$9,137 | \$11,445 | \$155 | -\$504 | \$15,596 | \$2,003 | \$24,044 | \$30,449 | \$955 | \$750 | \$216,881 | | | |

Notes:
(1) Carbon benefits are calculated using the marginal abatement cost.
(2) The "CHP Economic" column is a subset of the "Economic" column. CHP Economic benefits are included in the "Total (Economic Excluded)" column because of the statutory basis of CHP benefits.

Table E-2A
Rhode Island Energy
Summary of 2023 Energy Efficiency Impacts by Program

| | (a) | | (b) | | (c) | | (d) | | (e) | | (f) | | (g) | | (h) | | (i) | | (j) | |
|---------------------------------------|---------------|---------------|---------------|----------------|-------------------|----------------|-------------------|----------------|-----------------------|---------------|--------|--------|--------|----------|--------|----------|--------|----------|--------|----------|
| | kW Savings | | MWh Savings | | Gas MMBtu Savings | | Oil MMBtu Savings | | Propane MMBtu Savings | | Summer | Winter | Annual | Lifetime | Annual | Lifetime | Annual | Lifetime | Annual | Lifetime |
| 1 Residential | | | | | | | | | | | | | | | | | | | | |
| 2 Residential New Construction | 69 | 35 | 567 | 10,324 | 210 | 2,731 | 1 | 11 | 884 | 21,535 | | | | | | | | | | |
| 3 Residential HVAC | 212 | 1,349 | 5,702 | 98,697 | 510 | 7,649 | 4,480 | 67,206 | -1 | -11 | | | | | | | | | | |
| 4 EnergyWise Single Family | 404 | 449 | 2,386 | 15,596 | 32 | 305 | 22,012 | 425,623 | 179 | 1,818 | | | | | | | | | | |
| 5 EnergyWise Multifamily | 43 | 49 | 323 | 3,466 | 0 | 0 | 7 | 122 | 0 | 0 | | | | | | | | | | |
| 6 Home Energy Reports | 3,566 | 5,511 | 25,932 | 25,932 | 0 | 0 | 0 | 0 | 0 | 0 | | | | | | | | | | |
| 7 Residential Consumer Products | 515 | 170 | 2,131 | 15,024 | 0 | 0 | 1 | 17 | 1 | 14 | | | | | | | | | | |
| 8 Subtotal | 4,809 | 7,563 | 37,041 | 169,039 | 751 | 10,686 | 26,501 | 492,978 | 1,063 | 23,356 | | | | | | | | | | |
| 9 Income Eligible Residential | | | | | | | | | | | | | | | | | | | | |
| 10 Income Eligible Single Family | 444 | 360 | 2,628 | 34,471 | 323 | 4,832 | 6,713 | 126,576 | 390 | 7,415 | | | | | | | | | | |
| 11 Income Eligible Multifamily | 22 | 217 | 437 | 6,629 | 0 | 0 | 0 | 0 | 0 | 0 | | | | | | | | | | |
| 12 Subtotal | 466 | 576 | 3,065 | 41,100 | 323 | 4,832 | 6,713 | 126,576 | 390 | 7,415 | | | | | | | | | | |
| 13 Commercial & Industrial | | | | | | | | | | | | | | | | | | | | |
| 14 Large C&I New Construction | 974 | 822 | 8,563 | 126,976 | -1,001 | -15,019 | -51 | -770 | 0 | 0 | | | | | | | | | | |
| 15 Large C&I Retrofit | 5,860 | 5,028 | 38,245 | 259,740 | -5,628 | -39,185 | -2,057 | -20,260 | 0 | 0 | | | | | | | | | | |
| 16 Small Business Direct Install | 1,030 | 768 | 6,486 | 47,842 | -4,184 | -25,018 | -43 | -385 | 0 | 0 | | | | | | | | | | |
| 17 Subtotal | 7,863 | 6,617 | 53,294 | 434,558 | -10,814 | -79,223 | -2,151 | -21,416 | 0 | 0 | | | | | | | | | | |
| 18 Grand Total | 13,139 | 14,757 | 93,400 | 644,697 | -9,740 | -63,705 | 31,063 | 598,139 | 1,453 | 30,771 | | | | | | | | | | |

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Table E-2B
Rhode Island Energy
Summary of 2023 Demand Response Benefits by Program

| | (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) | | | | (i) | (j) | (k) | (l) | (m) | (n) | (o) | (p) | (q) | | (r) | |
|--------------------------------------|-----------------|---------------------------|-------------------|----------------|----------------|----------------|--------------|-------------|-----------------|-------------|-----------------|-----------------|-------------|------------|-----------------|----------------------------|-------------|------------|-----|-----|--|-----|--|
| | Total | Total (Economic Excluded) | Summer Generation | Capacity | | | | Energy | | | | Electric Energy | Societal | | | Summer Load Reduction (kW) | MWh Savings | | | | | | |
| | | | | Capacity DRIPE | Transmission | Distribution | Reliability | Summer Peak | Summer Off Peak | Winter Peak | Winter Off Peak | | Carbon | NOx | Economic | | Annual | Lifetime | | | | | |
| 1 Residential | | | | | | | | | | | | | | | | | | | | | | | |
| 2 Residential ConnectedSolutions | \$5,506 | \$2,699 | \$141 | \$571 | \$800 | \$1,002 | \$134 | \$9 | \$8 | \$2 | \$1 | \$6 | \$26 | \$0 | \$2,807 | 7,310 | 0.4 | 0.4 | | | | | |
| 3 Subtotal | \$5,506 | \$2,699 | \$141 | \$571 | \$800 | \$1,002 | \$134 | \$9 | \$8 | \$2 | \$1 | \$6 | \$26 | \$0 | \$2,807 | 7,310 | 0.4 | 0.4 | | | | | |
| 4 Commercial & Industrial | | | | | | | | | | | | | | | | | | | | | | | |
| 5 Commercial ConnectedSolutions | \$22,510 | \$10,188 | \$602 | \$2,440 | \$2,950 | \$3,696 | \$496 | \$1 | \$1 | \$0 | \$0 | \$0 | \$2 | \$0 | \$12,322 | 26,973 | 0.0 | 0.0 | | | | | |
| 6 Subtotal | \$22,510 | \$10,188 | \$602 | \$2,440 | \$2,950 | \$3,696 | \$496 | \$1 | \$1 | \$0 | \$0 | \$0 | \$2 | \$0 | \$12,322 | 26,973 | 0.0 | 0.0 | | | | | |
| 7 Grand Total | \$28,016 | \$12,888 | \$743 | \$3,012 | \$3,750 | \$4,697 | \$630 | \$10 | \$8 | \$2 | \$1 | \$6 | \$28 | \$0 | \$15,129 | 34,283 | 0.4 | 0.4 | | | | | |

Table E-3
Rhode Island Energy
Calculation of 2023 Program Year Cost-Effectiveness (\$000)

| | (a) | (b) | (c) | (d) | (e) |
|---|------------------------|--------------------|-------------------------|-------------------|-----------------------|
| | RI Test Benefit / Cost | Total Benefit | Implementation Expenses | Participant Cost | Performance Incentive |
| 1 Residential | | | | | |
| 2 Residential New Construction | 1.89 | \$3,066.9 | \$1,005.5 | \$620.2 | |
| 3 Residential HVAC | 1.99 | \$16,911.7 | \$5,339.5 | \$3,140.4 | |
| 4 EnergyWise Single Family | 0.96 | \$18,085.9 | \$15,666.8 | \$3,204.1 | |
| 5 EnergyWise Multifamily | 1.08 | \$979.6 | \$845.7 | \$62.6 | |
| 6 Home Energy Reports | 2.71 | \$6,185.2 | \$2,285.6 | \$0.0 | |
| 7 Residential Consumer Products | 1.32 | \$3,576.2 | \$1,811.2 | \$904.8 | |
| 8 Residential ConnectedSolutions | 0.80 | \$2,699.4 | \$3,381.9 | \$0.0 | |
| 9 Comprehensive Marketing - Residential | | | \$337.4 | | |
| 10 Community Based Initiatives - Residential | | | \$0.0 | | |
| 11 Residential Pilots | | | \$0.0 | | |
| 12 Residential Workforce Development | | | \$0.0 | | |
| 13 Subtotal | 1.33 | \$51,504.9 | \$30,673.6 | \$7,932.1 | \$176.3 |
| 14 Income Eligible Residential | | | | | |
| 15 Income Eligible Single Family | 1.48 | \$19,475.9 | \$13,124.8 | \$0.0 | |
| 16 Income Eligible Multifamily | 0.78 | \$1,339.0 | \$1,713.5 | \$0.0 | |
| 17 Income Eligible Workforce Development | | | \$0.0 | | |
| 18 Subtotal | 1.41 | \$20,814.9 | \$14,838.3 | \$0.0 | -\$42.0 |
| 19 Commercial & Industrial | | | | | |
| 20 Large C&I New Construction | 3.06 | \$23,526.6 | \$6,974.7 | \$715.1 | |
| 21 Large C&I Retrofit | 1.50 | \$64,060.9 | \$26,793.5 | \$15,960.6 | |
| 22 Small Business Direct Install | 1.48 | \$9,790.1 | \$5,402.6 | \$1,195.6 | |
| 23 Commercial ConnectedSolutions | 1.81 | \$10,188.2 | \$5,626.3 | \$0.0 | |
| 24 C&I Financing | | | \$2,000.0 | | |
| 25 Community Based Initiatives - C&I | | | \$14.0 | | |
| 26 Commercial Pilots | | | \$0.0 | | |
| 27 Commercial Workforce Development | | | \$9.3 | | |
| 28 Subtotal | 1.61 | \$107,565.8 | \$46,820.5 | \$17,871.3 | \$2,277.4 |
| 29 Portfolio | | | | | |
| 30 EERMC | | | \$574.5 | | |
| 31 OER | | | \$891.4 | | |
| 32 Electric Resistance to Heat Pump Conversions | | | \$409.3 | | |
| 33 Rhode Island Infrastructure Bank | | | \$3,737.5 | | |
| 34 Subtotal | | | \$5,612.6 | | |
| 35 Grand Total | 1.43 | \$179,885.6 | \$97,945.0 | \$25,803.4 | \$2,411.8 |

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Table E-4A
Rhode Island Energy
2023 PIM Benefits, Allocations, and Categorizations (\$000)

| | (a) | | (b) | | (c) | | (d) | (e) | (f) | (g) | | | (h) | (i) | (j) | (k) | (l) | | | (m) | (n) | (o) | (p) | | (q) | (r) |
|---------------------------------------|----------------|----------------|-----------------|-----------------|-----------------|----------------|---------------------------|----------------------|--------------------|---------------|----------------|---------------|-----------------|----------------|-----------------|-----------------|--------------|------------------|----------|-----|----------|-----|-----|--|-----|-----|
| | Summer | | Winter | | Electric Energy | | Electric Energy DRRIPE | Summer Generation | Capacity DRRIPE | Capacity | | | Reliability | Utility NEIs | Non Electric | | | Carbon | Societal | | Economic | | | | | |
| | Peak | Off Peak | Peak | Off Peak | DRRIPE | Transmission | | | | Distribution | Other Resource | Natural Gas | | | Oil | Non Resource | NOx | | | | | | | | | |
| 1 Residential | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 Residential New Construction | \$43 | \$37 | \$322 | \$436 | \$226 | \$90 | \$56 | \$178 | \$224 | \$1 | \$0 | \$23 | \$0 | \$972 | \$26 | \$422 | \$10 | \$1,569 | | | | | | | | |
| 3 Residential HVAC | \$230 | \$196 | \$3,239 | \$4,215 | \$2,337 | \$175 | \$170 | \$363 | \$455 | \$2 | \$0 | \$64 | \$1,718 | \$0 | \$391 | \$3,235 | \$123 | \$8,436 | | | | | | | | |
| 4 EnergyWise Single Family | \$231 | \$200 | \$330 | \$339 | \$341 | \$189 | \$217 | \$400 | \$501 | \$3 | \$0 | \$3 | \$11,069 | \$229 | \$826 | \$2,990 | \$420 | \$16,450 | | | | | | | | |
| 5 EnergyWise Multifamily | \$62 | \$51 | \$87 | \$104 | \$79 | \$34 | \$25 | \$67 | \$84 | \$0 | \$0 | \$3 | \$8 | \$259 | \$115 | \$2 | \$1,226 | | | | | | | | | |
| 6 Home Energy Reports | \$252 | \$193 | \$652 | \$559 | \$572 | \$237 | \$961 | \$390 | \$489 | \$66 | \$0 | \$0 | \$0 | \$0 | \$0 | \$1,792 | \$20 | \$2,537 | | | | | | | | |
| 7 Residential Consumer Products | \$212 | \$196 | \$257 | \$258 | \$439 | \$164 | \$402 | \$380 | \$476 | \$5 | \$0 | \$0 | \$3 | \$0 | \$773 | \$11 | \$2,988 | | | | | | | | | |
| 8 Subtotal | \$1,029 | \$875 | \$4,886 | \$5,912 | \$3,994 | \$888 | \$1,831 | \$1,779 | \$2,229 | \$76 | \$0 | \$89 | \$12,791 | \$1,212 | \$1,503 | \$9,127 | \$586 | \$33,207 | | | | | | | | |
| 9 Income Eligible Residential | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 10 Income Eligible Single Family | \$432 | \$443 | \$784 | \$851 | \$732 | \$295 | \$318 | \$617 | \$773 | \$4 | \$75 | \$40 | \$3,286 | \$791 | \$8,130 | \$1,833 | \$147 | \$12,600 | | | | | | | | |
| 11 Income Eligible Multifamily | \$33 | \$18 | \$99 | \$131 | \$83 | \$17 | \$16 | \$36 | \$45 | \$0 | \$0 | \$0 | \$0 | \$3 | \$107 | \$2 | \$2,228 | | | | | | | | | |
| 12 Subtotal | \$465 | \$462 | \$883 | \$982 | \$815 | \$313 | \$334 | \$652 | \$817 | \$4 | \$75 | \$40 | \$3,286 | \$791 | \$8,133 | \$1,939 | \$149 | \$14,827 | | | | | | | | |
| 13 Commercial & Industrial | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 14 Large C&I New Construction | \$2,159 | \$1,432 | \$3,164 | \$2,160 | \$2,972 | \$741 | \$782 | \$1,548 | \$1,938 | \$9 | \$0 | -\$122 | -\$18 | \$0 | \$2,581 | \$4,113 | \$68 | \$19,111 | | | | | | | | |
| 15 Large C&I Retrofit | \$4,514 | \$2,811 | \$5,077 | \$3,381 | \$7,969 | \$1,865 | \$4,601 | \$4,328 | \$5,421 | \$56 | \$0 | -\$312 | -\$454 | \$0 | \$11,556 | \$13,111 | \$137 | \$141,470 | | | | | | | | |
| 16 Small Business Direct Install | \$731 | \$396 | \$1,159 | \$713 | \$1,485 | \$364 | \$826 | \$830 | \$1,040 | \$10 | \$0 | -\$200 | -\$9 | \$0 | \$271 | \$2,159 | \$15 | \$8,266 | | | | | | | | |
| 17 Subtotal | \$7,404 | \$4,638 | \$9,399 | \$6,254 | \$12,425 | \$2,970 | \$6,209 | \$6,706 | \$8,400 | \$75 | \$0 | -\$633 | -\$480 | \$0 | \$14,408 | \$19,383 | \$221 | \$168,846 | | | | | | | | |
| 18 Grand Total | \$8,897 | \$5,975 | \$15,168 | \$13,147 | \$17,235 | \$4,171 | \$8,373 | \$9,137 | \$11,445 | -\$155 | \$75 | -\$504 | \$15,596 | \$2,003 | \$24,044 | \$30,449 | \$955 | \$216,881 | | | | | | | | |
| 19 Benefit is PIM Eligible | TRUE | TRUE | TRUE | TRUE | TRUE | TRUE | TRUE | TRUE | TRUE | TRUE | TRUE | TRUE | TRUE | TRUE | TRUE | FALSE | FALSE | FALSE | | | | | | | | |
| 20 Percent Application in PIM | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 50% | 50% | 0% | 0% | 0% | 0% | | | | | | | | |

Notes:
(1) ConnectedSolutions was not included in the PIM calculation for 2023 because of the potential for earning an Annual MW Capacity Savings Performance-Based Incentive Mechanism in Docket Nos. 4770/4780.

Table E-4B
Rhode Island Energy
2023 PIM Costs (\$000)

| | (a) | (b) | (c) |
|-------------------------------|---------------------|------------------|--------------------------|
| | Eligible PIM Budget | Regulatory Costs | Total PIM-Eligible Costs |
| 1 Residential | \$27,292 | \$191 | \$27,483 |
| 2 Income Eligible Residential | \$14,838 | \$191 | \$15,030 |
| 3 Commercial & Industrial | \$41,194 | \$191 | \$41,386 |

Notes:

(1) Regulatory costs only include EERMC costs which are distributed equally to each sector.

Table E-4C
Rhode Island Energy
2023 PIM and SQA

| | (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) |
|-------------------------------|----------------------------------|-------------------|-------------------------|----------------|-----------------------|------------------------|---------------------|----------------------|
| | Inputs (\$000) | | | | | | | |
| | Electric Utility System Benefits | Resource Benefits | Achieved Total Benefits | Achieved Costs | Achieved Net Benefits | Planned Total Benefits | Planned Total Costs | Planned Net Benefits |
| 1 Residential | \$23,499 | \$7,046 | \$30,544 | \$27,483 | \$3,061 | \$35,798 | \$29,283 | \$6,515 |
| 2 Income Eligible Residential | \$5,801 | \$2,059 | \$7,860 | \$15,030 | -\$7,170 | \$8,616 | \$16,675 | -\$8,060 |
| 3 Commercial & Industrial | \$64,479 | -\$557 | \$63,923 | \$41,386 | \$22,537 | \$67,121 | \$40,394 | \$26,727 |

| | PIM (\$000) | | | | | | |
|-------------------------------|--------------------------------|--|--------------------------|---------------------------|--------------------|------------|------------------------------|
| | Design Performance Achievement | Achieved Net Benefits / Design Performance Achievement | Achieved / Planned Costs | Design Performance Payout | Design Payout Rate | Payout Cap | Earned Performance Incentive |
| 4 Residential | \$6,515 | 47.0% | 93.9% | \$658 | 10.1% | \$823 | \$176 |
| 5 Income Eligible Residential | \$2,000 | -358.5% | 90.1% | \$500 | 25.0% | \$625 | \$0 |
| 6 Commercial & Industrial | \$26,727 | 84.3% | 102.5% | \$2,701 | 10.1% | \$3,376 | \$2,277 |

| | SQA (\$000) | | | | |
|-------------------------------|----------------------------|---------------------|----------------------------|-----------------------------------|---|
| | Design Service Achievement | Service Achievement | Maximum Service Adjustment | Service Quality Adjustment Amount | % of Maximum Service Quality Adjustment Applied |
| 7 Residential | \$35,798 | 85.3% | \$0 | N/A | N/A |
| 8 Income Eligible Residential | \$8,616 | 91.2% | \$334 | \$42 | 12.6% |
| 9 Commercial & Industrial | \$67,121 | 95.2% | \$0 | N/A | N/A |

| | Total Earnings (\$000) | | |
|--------------------------------|------------------------------|-----------------------------------|----------------|
| | Earned Performance Incentive | Service Quality Adjustment Amount | Total Earnings |
| 10 Residential | \$176 | \$0 | \$176 |
| 11 Income Eligible Residential | \$0 | \$42 | -\$42 |
| 12 Commercial & Industrial | \$2,277 | \$0 | \$2,277 |
| 13 Portfolio | \$2,454 | \$42 | \$2,412 |

Notes:

(1) For more information on the 2023 PIM, see RI Energy's 2023 Energy Efficiency Plan (Docket 22-33), Bates page 98.

**Table E-5
Rhode Island Energy
2023 Overall Analysis of Energy Efficiency Fund Balance**

| | (a) JANUARY | (b) FEBRUARY | (c) MARCH | (d) APRIL | (e) MAY | (f) JUNE | (g) TOTAL |
|--|----------------|-----------------|------------------|----------------|-----------------|-----------------|-----------------------|
| 1. Start Of Period Balance | \$39,889,083 | \$38,177,448 | \$35,885,772 | \$32,113,932 | \$32,738,210 | \$32,285,556 | \$39,889,083 |
| 2. Revenue | \$868,801 | \$307,127 | \$380,517 | \$5,488,167 | \$5,974,377 | \$6,242,527 | \$19,261,516 |
| 3. Monthly EE Expenses | \$2,627,573 | \$2,643,522 | \$4,235,837 | \$4,943,505 | \$6,506,858 | \$2,692,558 | \$23,649,854 |
| 4. Cash Flow Over/(Under) | (\$1,758,772) | (\$2,336,395) | (\$3,855,321) | \$544,662 | (\$532,481) | \$3,549,969 | (\$4,388,337) |
| 5. End Of Period Balance Before Interest | \$38,130,311 | \$35,841,053 | \$32,030,452 | \$32,658,594 | \$32,205,729 | \$35,835,525 | \$35,500,746 |
| 6. Interest | \$47,137 | \$44,720 | \$83,480 | \$79,616 | \$79,827 | \$83,732 | \$418,512 |
| 7. End Of Period Balance After Interest | \$38,177,448 | \$35,885,772 | \$32,113,932 | \$32,738,210 | \$32,285,556 | \$35,919,258 | \$35,919,258 |
| | JULY | AUGUST | SEPTEMBER | OCTOBER | NOVEMBER | DECEMBER | YEAR END TOTAL |
| 8. Start Of Period Balance | \$35,919,258 | \$37,957,498 | \$38,966,571 | \$42,241,858 | \$40,945,242 | \$33,130,420 | \$39,889,083 |
| 9. Revenue 19 | \$7,929,335 | \$7,009,680 | \$6,726,708 | \$5,798,586 | \$5,693,630 | \$5,837,669 | \$58,257,125 |
| 10. Monthly EE Expenses | \$5,981,790 | \$6,095,044 | \$3,551,117 | \$7,197,327 | \$13,599,392 | \$37,461,170 | \$97,535,694 |
| 11. Cash Flow Over/(Under) | \$1,947,545 | \$914,637 | \$3,175,591 | (\$1,398,741) | (\$7,905,762) | (\$31,623,501) | (\$39,278,569) |
| 12. End Of Period Balance Before Interest | \$37,866,803 | \$38,872,135 | \$42,142,162 | \$40,843,117 | \$33,039,480 | \$1,506,919 | \$610,514 |
| 13. Interest | \$90,695 | \$94,436 | \$99,696 | \$102,125 | \$90,940 | \$42,575 | \$938,980 |
| 14. End Of Period Balance After Interest | \$37,957,498 | \$38,966,571 | \$42,241,858 | \$40,945,242 | \$33,130,420 | \$1,549,494 | \$1,549,494 |
| 15. 2023 Incentive | | | | | | | \$2,411,754 |
| 16. Ending Balance after Incentive | | | | | | | (\$862,261) |
| 17. Income Eligible Subsidization | | | | | | | \$0 |
| 18. Ending Balance after Subsidization | | | | | | | (\$862,261) |
| 1. Previous year's ending balance | | | | | | | |
| 2. Business Objects queries for revenues | | | | | | | |
| 3. SAP queries for expenses | | | | | | | |
| 4. Line 2 minus Line 3 | | | | | | | |
| 5. Line 1 plus Line 4 | | | | | | | |
| 6. Interest applied | | | | | | | |
| 7. Line 5 plus Line 6 | | | | | | | |
| 8. Previous month's ending balance | | | | | | | |
| 9. Business Objects queries for revenues | | | | | | | |
| 10. SAP and Oracle queries for expenses | | | | | | | |
| 11. Line 9 minus Line 10 | | | | | | | |
| 12. Line 8 plus Line 11 | | | | | | | |
| 13. Interest applied | | | | | | | |
| 14. Line 12 plus Line 13 | | | | | | | |
| 15. Estimated 2023 Incentive plus prior period true-ups | | | | | | | |
| 19. Revenues in July 2016 include \$1.525 million received from RGGI for the RI-E Municipal LED Lighting program Expenses for this program are captured in WO 90000176341 | | | | | | | |

CORRECTED

Table E-6
Rhode Island Energy
2023 Revolving Loan Funds

| Large C&I Electric Revolving Loan Fund | | Small Business Electric Revolving Loan Fund | |
|--|--------------|--|-------------|
| (a) | (b) | (c) | (d) |
| <u>Income Statement</u> | | <u>Income Statement</u> | |
| (1) 2023 Funds Available | \$10,419,391 | (1) 2023 Funds Available | \$3,894,924 |
| (2) 2023 Loan budget | \$14,000,000 | (2) 2023 Loan budget | \$1,500,000 |
| (3) Committed | \$0 | (3) Committed | \$0 |
| (4) Paid | \$4,652,253 | (4) Paid | \$688,804 |
| (5) Repayments | \$7,090,063 | (5) Repayments | \$914,499 |
| (6) Available 12/31/23 | \$12,857,201 | (6) Available 12/31/23 | \$4,120,619 |
| (7) Outstanding loan volume | \$14,465,530 | (7) Outstanding loan volume | \$516,235 |
| (8) Loan defaults during period (\$) | \$0 | (8) Loan defaults during period (\$) | \$24,092 |
| (9) Arrears over 120 days at period end (\$) | \$26,128 | (9) Arrears over 120 days at period end (\$) | \$10,534 |
| <u>Program Impact</u> | | <u>Program Impact</u> | |
| (10) Number of loans | 532 | (10b) Participants | 427 |
| (10b) Participants | 379 | (11) Annual Savings (Gross MWh) | 7,778 |
| (11) Annual Savings (Gross MWh) | 41,894 | (12) Annual Savings (Net MWh) | 6,486 |
| (12) Annual Savings (Net MWh) | 31,628 | (13) Lifetime Savings (Gross MWh) | 60,459 |
| (13) Lifetime Savings (Gross MWh) | 369 | (14) Lifetime Savings (Net MWh) | 47,842 |
| (14) Lifetime Savings (Net MWh) | 268,321 | (15) Annual Savings (Gross kW) | 1,277 |
| (15) Annual Savings (Gross kW) | 60 | (16) Annual Saving (Net kW) | 1,030 |
| (16) Annual Saving (Net kW) | 47 | (17) Total associated incentive volume (\$) | \$4,688,819 |
| (17) Total associated incentive volume (\$) | \$21,250,207 | (18) Total annual estimated energy cost savings (\$) | \$1,148,020 |
| (18) Total annual estimated energy cost savings (\$) | \$5,598,156 | | |

Rhode Island Public Energy Partnership (RI PEP)

| (a) | (b) |
|--|----------|
| <u>Income Statement</u> | |
| (1) 2022 Funds Available | \$54,162 |
| (2) 2022 Loan budget | \$0 |
| (3) Committed | \$0 |
| (4) Paid | \$0 |
| (4a) Funds Returned to OER | \$0 |
| (4b) Funds Transferred to RGGI ASHP | \$54,162 |
| (5) Repayments | \$0 |
| (6) Available 12/31/23 | \$0 |
| (7) Outstanding loan volume | \$0 |
| (8) Loan defaults during period (\$) | \$0 |
| (9) Arrears over 120 days at period end (\$) | \$0 |
| <u>Program Impact</u> | |
| (10) Number of loans | 0 |
| (10b) Participants | 0 |
| (11) Annual Savings (Gross MWh) | 0 |
| (12) Annual Savings (Net MWh) | 0 |
| (13) Lifetime Savings (Gross MWh) | 0 |
| (14) Lifetime Savings (Net MWh) | 0 |
| (15) Annual Savings (Gross kW) | 0 |
| (16) Annual Saving (Net kW) | 0 |
| (17) Total associated incentive volume (\$) | \$0 |
| (18) Total annual estimated energy cost savings (\$) | \$0 |

Notes:

- 1 Amount available as of January 1, 2023. Includes line (6) "Available 12/31/21" plus line (3) "Committed" in Table E-6 and G-6 of the 2022 Year End Report.
- 2 Budget adopted by Sales Team for 2023 operations. Budget includes projections of repayments made during 2022.
- 3 As of December 31, 2023
- 4 As of December 31, 2023. This includes all projects paid through December 31, 2023 and the OBR associated with those projects. OBR payment are processed once
- 4a Funds returned to RI OER.
- 4b Funds transferred to RGGI Air Source Heat Pump Program
- 5 As of December 31, 2023
- 6 Fund balance as of December 31, 2023. Committed funds are subtracted from this amount.
- 7 Total outstanding loan balance. Loans lent out that still need to be paid back. This includes loans from previous years.
- 8 Total loan value in default during period.
- 9 Total loan value in arrears for over 120 days as of December 31, 2023.
- 10 As of December 31, 2023
- 10b Unique customer names for large business (one customer name can have multiple sub accounts as is in the case of a franchise). Customer accounts used for small
- 11 As of December 31, 2023
- 12 As of December 31, 2023
- 13 As of December 31, 2023
- 14 As of December 31, 2023
- 15 As of December 31, 2023
- 16 As of December 31, 2023
- 17 Incentives paid out with loans.
- 18 Estimated energy cost savings to loan fund participants.

Table E-7
Rhode Island Energy
2023 Heat Loans

| | (a) | (b) | (c) | (d) | (e) |
|---|---------------------------------|-------------------------------|-------------------------|------------------|--------------|
| | EnergyWise Single Family | EnergyWise Multifamily | Residential HVAC | Batteries | Total |
| (1) Number of loans | 713 | 11 | 82 | 107 | 913 |
| (2) Loan amount | \$6,046,994 | \$121,537 | \$1,250,641 | \$2,107,060 | \$9,526,231 |
| (3) Measures | | | | | |
| <i>Pre-Weatherization</i> | 46 | | | | |
| <i>Weatherization</i> | 356 | | | | |
| <i>Heatsystems</i> | 370 | | | | |
| <i>DHW</i> | 48 | | | | |
| (4) Percentage of weatherization in loans | 50% | | | | |

Notes

- 1 Equals the number of participants. As of December 31, 2023
- 2 Total amount of loans dispersed in 2023. Heat Loan costs are integrated in the program implementation expenses in tables E-1 and E-3.
- 3 Measures financed through loans.
- 4 Percentage of Heat Loan recipients using their loan for weatherization.

Attachment 1a (Corrected)

Electric Costs Schedules

CORRECTED

Schedule 1 - Program and Sector Cost Summary
DIRECT vs ALLOCATED

| | Total Costs | (a) | | (b) | | (c) | | (d) | | (e) | (f) | (g) | (h) | (i) | (j) | (k) | (l) | (m) | (n) | (o) | (p) | | | | |
|---|--------------|--|-------------|---|--------------|--------------|--|---|--------------|--|-----|---|-----------|---|-------------|--|-----|---|-----|-----|-----|-----------------|--|--|--|
| | | TOTALS | | | | DETAILS | | | | | | | | | | | | | | | | | | | |
| | | TOTAL SPLIT 1 | | TOTAL SPLIT 2 | | DIRECT COSTS | | | | | | | | | | | | | | | | ALLOCATED COSTS | | | |
| DIRECT vs ALLOCATED | | Cost of services and product rebates/incentives provided to customers vs. Other Costs ⁽¹⁾ | | Cost of services and product rebates/incentives provided to customers | | | | | | | | Cost of services and product rebates/incentives provided to customers | | | | | | | | | | | | | |
| | | DIRECT vs ALLOCATED | | Cost of services and product rebates/incentives provided to customers | | Other Costs | | Rhode Island Energy Direct Labor & Employee Expense | | Rhode Island Energy Direct Labor, Expense, External ⁽²⁾ | | Rhode Island Energy Allocated Labor & Employee Expense | | Rhode Island Energy Allocated Labor, Expense, External ⁽²⁾ | | Rhode Island Energy Allocated Labor & Employee Expense | | Rhode Island Energy Allocated Labor, Expense, Vendor ⁽²⁾ | | | | | | | |
| 1 Residential New Construction (Electric) | \$1,005,549 | \$816,531 | \$189,017 | \$562,042 | \$443,506 | | | \$0 | \$0 | \$562,042 | \$0 | \$42,439 | \$146,579 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 2 ENERGY STAR HVAC (Electric) | \$5,339,462 | \$4,993,176 | \$346,286 | \$3,832,864 | \$1,506,598 | | | \$85,584 | \$1,074,738 | \$0 | \$0 | \$3,832,864 | \$87,327 | \$258,959 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 3 EnergyWise (Electric) | \$15,666,788 | \$14,947,229 | \$719,558 | \$12,691,474 | \$2,975,314 | | | \$11,434 | \$2,244,321 | \$0 | \$0 | \$12,691,474 | \$0 | \$165,598 | \$553,960 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 4 EnergyWise Multi Family (Electric) | \$845,732 | \$685,394 | \$160,338 | \$401,010 | \$444,723 | | | \$51,899 | \$232,485 | \$0 | \$0 | \$401,010 | \$0 | \$41,461 | \$118,878 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 5 Home Energy Reports (Electric) | \$2,285,617 | \$2,202,010 | \$83,607 | \$0 | \$2,285,617 | | | \$0 | \$2,202,010 | \$0 | \$0 | \$0 | \$0 | \$24,745 | \$58,862 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 6 ENERGY STAR Lighting (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | | | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 7 Residential Consumer Products (Electric) | \$1,811,205 | \$1,631,621 | \$179,584 | \$608,747 | \$1,202,459 | | | \$35,357 | \$907,514 | \$0 | \$0 | \$608,747 | \$0 | \$41,587 | \$137,998 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 8 Residential ConnectedSolutions (Electric) | \$3,381,864 | \$3,275,290 | \$106,575 | \$2,692,488 | \$689,376 | | | \$40,136 | \$542,665 | \$0 | \$0 | \$2,692,488 | \$0 | \$28,156 | \$78,419 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 9 Energy Efficiency Education Programs (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | | | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 10 Residential Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | | | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 11 Community Based Initiatives - Residential (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | | | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 12 Comprehensive Marketing Residential (Electric) | \$337,354 | \$316,240 | \$21,115 | \$0 | \$337,354 | | | \$0 | \$316,240 | \$0 | \$0 | \$0 | \$0 | \$383 | \$20,732 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 13 Subtotal Non-income Eligible Residential | \$30,673,572 | \$28,867,490 | \$1,806,082 | \$20,788,625 | \$9,884,948 | | | \$238,724 | \$7,840,142 | \$0 | \$0 | \$20,788,625 | \$0 | \$431,694 | \$1,374,388 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 14 Single Family - Income Eligible Services (Electric) | \$13,124,813 | \$12,554,335 | \$570,478 | \$10,576,252 | \$2,548,561 | | | \$27,829 | \$1,950,254 | \$0 | \$0 | \$10,576,252 | \$0 | \$153,381 | \$417,097 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 15 Income Eligible Multifamily (Electric) | \$1,713,472 | \$1,514,252 | \$199,219 | \$1,277,527 | \$435,943 | | | \$45,417 | \$191,309 | \$0 | \$0 | \$1,277,527 | \$0 | \$52,573 | \$146,647 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 16 Subtotal Income Eligible Residential | \$14,838,285 | \$14,068,588 | \$769,697 | \$11,853,779 | \$2,984,506 | | | \$73,246 | \$2,141,563 | \$0 | \$0 | \$11,853,779 | \$0 | \$205,953 | \$563,744 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 17 Large Commercial New Construction (Electric) | \$6,974,704 | \$6,327,050 | \$647,654 | \$4,594,528 | \$2,380,176 | | | \$98,159 | \$1,634,362 | \$0 | \$0 | \$4,594,528 | \$0 | \$366,928 | \$280,726 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 18 Large Commercial Retrofit (Electric) | \$26,793,528 | \$25,091,204 | \$1,702,325 | \$21,539,293 | \$5,254,236 | | | \$156,329 | \$3,395,583 | \$0 | \$0 | \$21,539,293 | \$0 | \$1,003,471 | \$698,854 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 19 Small Business Direct Install (Electric) | \$5,402,589 | \$5,048,928 | \$353,661 | \$4,688,819 | \$713,771 | | | \$5,179 | \$354,930 | \$0 | \$0 | \$4,688,819 | \$0 | \$143,333 | \$210,329 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 20 Commercial ConnectedSolutions (Electric) | \$5,626,315 | \$5,424,487 | \$201,827 | \$4,920,493 | \$705,822 | | | \$23,562 | \$480,433 | \$0 | \$0 | \$4,920,493 | \$0 | \$86,815 | \$115,013 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 21 Commercial Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | | | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 22 Community Based Initiatives - C&I (Electric) | \$14,014 | \$14,016 | \$0 | \$0 | \$14,016 | | | \$13,041 | \$973 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 23 Finance Costs (Electric) | \$5,737,491 | \$5,737,491 | \$0 | \$5,737,491 | \$0 | | | \$0 | \$0 | \$0 | \$0 | \$5,737,491 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 24 Commercial Workforce Development (Electric) | \$9,328 | \$9,328 | \$0 | \$0 | \$9,328 | | | \$506 | \$8,822 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 25 Subtotal Commercial & Industrial | \$50,557,972 | \$47,652,504 | \$2,905,468 | \$41,480,624 | \$9,077,348 | | | \$296,776 | \$5,875,105 | \$0 | \$0 | \$41,480,624 | \$0 | \$1,600,547 | \$1,304,922 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 26 DER (Electric) | \$891,394 | \$891,394 | \$0 | \$0 | \$891,394 | | | \$0 | \$891,394 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 27 EERMC (Electric) ⁽³⁾ | \$574,471 | \$574,471 | \$0 | \$0 | \$574,471 | | | \$0 | \$574,471 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 28 Subtotal Regulatory | \$1,465,865 | \$1,465,865 | \$0 | \$0 | \$1,465,865 | | | \$0 | \$1,465,865 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| 29 TOTAL All Sectors | \$97,535,694 | \$92,054,447 | \$5,481,248 | \$74,123,027 | \$23,412,667 | | | \$608,746 | \$17,322,674 | \$0 | \$0 | \$74,123,027 | \$0 | \$2,238,194 | \$3,243,053 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| SRP PROGRAMS (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | | | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |
| OTHER COSTS NOT LISTED ABOVE (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | | | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | | | | |

(1) In the 2020 Energy Efficiency Annual Plan filing, this cost category was referred to as "Rebates and Other Incentives"
(2) These Costs do not include costs relating to the cost of services and product rebates/incentives provided to customers
(3) These costs include a \$203,587.65 credit due to a refund from EERMC of past unspent funds.

CORRECTED

Schedule 1a - Program and Sector Cost Summary

By Report Category

| | | (d) (Schedule 4) col a | (e) (Schedule 5) col a | (f) (Schedule 6) col a | (g) (Schedule 7) col a | (h) (Schedule 8) col a |
|----|--|------------------------------|------------------------------|---|------------------------------|------------------------------|
| | Total Costs | Program Planning & Admin. | Marketing | Cost of services and product rebates/incentives provided to customers (1) | STAT | Evaluation & Research |
| 1 | Residential New Construction (Electric) | \$1,005,549 | \$154,790 | \$1,527 | \$562,042 | \$79,212 |
| 2 | ENERGY STAR HVAC (Electric) | \$5,339,462 | \$377,603 | \$280,177 | \$3,832,864 | \$51,159 |
| 3 | EnergyWise (Electric) | \$15,666,788 | \$568,039 | \$313,535 | \$12,691,474 | \$226,066 |
| 4 | EnergyWise Multi Family (Electric) | \$845,732 | \$194,811 | \$75,932 | \$401,010 | \$87,488 |
| 5 | Home Energy Reports (Electric) | \$2,285,617 | \$55,251 | \$845 | \$0 | \$13,630 |
| 6 | ENERGY STAR Lighting (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 |
| 7 | Residential Consumer Products (Electric) | \$1,811,206 | \$220,097 | \$416,332 | \$608,747 | \$15,540 |
| 8 | Residential ConnectedSolutions (Electric) | \$3,381,864 | \$103,718 | \$734 | \$2,692,488 | \$10,897 |
| 9 | Energy Efficiency Education Programs (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 |
| 10 | Residential Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 |
| 11 | Community Based Initiatives - Residential (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 |
| 12 | Comprehensive Marketing Residential (Electric) | \$337,354 | \$1,338 | \$336,016 | \$0 | \$0 |
| 13 | Subtotal Non-Income Eligible Residential | \$30,673,572 | \$1,675,647 | \$1,425,098 | \$20,788,625 | \$483,993 |
| 14 | Single Family - Income Eligible Services (Electric) | \$13,124,813 | \$536,322 | \$161,926 | \$10,576,252 | \$69,497 |
| 15 | Income Eligible Multifamily (Electric) | \$1,713,472 | \$221,290 | \$8,270 | \$1,277,527 | \$26,711 |
| 16 | Subtotal Income Eligible Residential | \$14,838,285 | \$757,613 | \$170,196 | \$11,853,779 | \$96,208 |
| 17 | Large Commercial New Construction (Electric) | \$6,974,704 | \$234,280 | \$184,897 | \$4,594,528 | \$442,057 |
| 18 | Large Commercial Retrofit (Electric) | \$26,793,529 | \$787,379 | \$150,175 | \$21,539,293 | \$770,330 |
| 19 | Small Business Direct Install (Electric) | \$5,402,589 | \$268,260 | \$214,869 | \$4,688,819 | \$161,221 |
| 20 | Commercial ConnectedSolutions (Electric) | \$5,626,315 | \$679,758 | \$0 | \$4,920,493 | \$0 |
| 21 | Commercial Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 |
| 22 | Community Based Initiatives - C&I (Electric) | \$14,016 | \$113 | \$0 | \$0 | \$0 |
| 23 | Finance Costs (Electric) | \$5,737,491 | \$0 | \$0 | \$5,737,491 | \$0 |
| 24 | Commercial Workforce Development (Electric) | \$9,328 | \$0 | \$0 | \$0 | \$0 |
| 25 | Subtotal Commercial & Industrial | \$50,557,972 | \$1,969,791 | \$549,940 | \$41,480,624 | \$1,373,608 |
| 26 | OER (Electric) | \$891,394 | \$891,394 | \$0 | \$0 | \$0 |
| 27 | EERMC (Electric) | \$574,471 | \$565,815 | \$8,656 | \$0 | \$0 |
| 28 | Subtotal Regulatory | \$1,465,865 | \$1,457,209 | \$8,656 | \$0 | \$0 |
| 29 | TOTAL All Sectors | \$97,535,694 | \$5,860,260 | \$2,153,891 | \$74,123,027 | \$1,953,808 |
| | SRP PROGRAMS (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 |
| | OTHER COSTS NOT LISTED ABOVE (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 |

CORRECTED

Schedule 2 - Labor and Employee Expenses

| | (a) (b)+(c) | (b) (e)+(h) | (c) (f)+(i) | (d) (e)+(f) | (e) | (f) | (g) (h)+(i) | (h) | (i) |
|---|--|---|--|---------------------------------------|--|---|--|---|--|
| | Total Rhode Island Energy Labor + Expenses | Rhode Island Energy Direct Labor + Expenses | Rhode Island Energy Allocated Labor + Expenses | Total Rhode Island Energy Labor | Rhode Island Energy Direct Labor | Rhode Island Energy Allocated Labor | Total Rhode Island Energy Employee Expenses | Rhode Island Energy Direct Employee Expenses | Rhode Island Energy Allocated Employee Expenses |
| 1 Residential New Construction (Electric) | \$56,752 | \$14,313 | \$42,439 | \$56,127 | \$14,313 | \$41,814 | \$625 | \$0 | \$625 |
| 2 ENERGY STAR HVAC (Electric) | \$172,910 | \$85,584 | \$87,327 | \$171,687 | \$85,584 | \$86,103 | \$1,223 | \$0 | \$1,223 |
| 3 EnergyWise (Electric) | \$177,032 | \$11,434 | \$165,598 | \$174,738 | \$11,434 | \$163,303 | \$2,294 | \$0 | \$2,294 |
| 4 EnergyWise Multi Family (Electric) | \$93,360 | \$51,899 | \$41,461 | \$92,842 | \$51,899 | \$40,943 | \$518 | \$0 | \$518 |
| 5 Home Energy Reports (Electric) | \$24,745 | \$0 | \$24,745 | \$23,943 | \$0 | \$23,943 | \$802 | \$0 | \$802 |
| 6 ENERGY STAR Lighting (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 7 Residential Consumer Products (Electric) | \$76,944 | \$35,357 | \$41,587 | \$76,289 | \$35,357 | \$40,931 | \$656 | \$0 | \$656 |
| 8 Residential ConnectedSolutions (Electric) | \$68,292 | \$40,136 | \$28,156 | \$67,878 | \$40,136 | \$27,741 | \$414 | \$0 | \$414 |
| 9 Energy Efficiency Education Programs (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 10 Residential Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 11 Community Based Initiatives - Residential (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 12 Comprehensive Marketing Residential (Electric) | \$383 | \$0 | \$383 | \$378 | \$0 | \$378 | \$4 | \$0 | \$4 |
| 13 Subtotal Non-Income Eligible Residential | \$670,418 | \$238,724 | \$431,694 | \$663,881 | \$238,724 | \$425,158 | \$6,537 | \$0 | \$6,537 |
| 14 Single Family - Income Eligible Services (Electric) | \$181,210 | \$27,829 | \$153,381 | \$178,955 | \$27,829 | \$151,126 | \$2,255 | \$0 | \$2,255 |
| 15 Income Eligible Multifamily (Electric) | \$97,990 | \$45,417 | \$52,573 | \$97,246 | \$45,417 | \$51,829 | \$744 | \$0 | \$744 |
| 16 Subtotal Income Eligible Residential | \$279,200 | \$73,246 | \$205,953 | \$276,201 | \$73,246 | \$202,954 | \$2,999 | \$0 | \$2,999 |
| 17 Large Commercial New Construction (Electric) | \$465,088 | \$98,159 | \$366,928 | \$460,551 | \$98,097 | \$362,454 | \$4,536 | \$62 | \$4,474 |
| 18 Large Commercial Retrofit (Electric) | \$1,159,799 | \$156,329 | \$1,003,471 | \$1,147,703 | \$156,186 | \$991,517 | \$12,096 | \$142 | \$11,954 |
| 19 Small Business Direct Install (Electric) | \$148,512 | \$5,179 | \$143,333 | \$147,241 | \$5,179 | \$142,062 | \$1,271 | \$0 | \$1,271 |
| 20 Commercial ConnectedSolutions (Electric) | \$110,376 | \$23,562 | \$86,815 | \$109,636 | \$23,562 | \$86,075 | \$740 | \$0 | \$740 |
| 21 Commercial Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 22 Community Based Initiatives - C&I (Electric) | \$13,041 | \$13,041 | \$0 | \$12,502 | \$12,502 | \$0 | \$539 | \$539 | \$0 |
| 23 Finance Costs (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 24 Commercial Workforce Development (Electric) | \$506 | \$506 | \$0 | \$0 | \$0 | \$0 | \$506 | \$506 | \$0 |
| 25 Subtotal Commercial & Industrial | \$1,897,322 | \$296,776 | \$1,600,547 | \$1,877,634 | \$295,526 | \$1,582,108 | \$19,689 | \$1,250 | \$18,439 |
| 26 OER (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 27 EERMC (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 28 Subtotal Regulatory | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 29 TOTAL All Sectors | \$2,846,940 | \$608,746 | \$2,238,194 | \$2,817,716 | \$607,496 | \$2,210,220 | \$29,224 | \$1,250 | \$27,974 |
| SRP PROGRAMS (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| OTHER COSTS NOT LISTED ABOVE (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |

CORRECTED

Schedule 3 - Expenses Categorized as Vendor Costs in Company's Systems¹

| | (a) | (b) | (c) (a) - (b) | (d) | (e) | (f) (d) + (e) | (g) (c) + (f) |
|---|--|--|--|---|--|---|---|
| | Total Costs of Services, Products, and Rebates Provided to Customers.2 (also referred to as "Rebates and Other Customer Incentives") | Rebate Payments Made Directly to Customers by Rhode Island Energy and Rebates Paid to PEX's to Whom Customer Rebates were Assigned | Payments to Service Vendors for Costs Relating to Services, Products, and Processing Rebates (excluding costs included in col. b)3 | Direct "External Costs"4 from Vendor Services | "External Costs" from Vendors Originating from an Allocation | Total of Vendor Costs Categorized as "External Costs" from Service Vendors (excluding costs included in columns a, b & c) | Total Costs from Service Vendors, Excluding Rebate Payments Made Directly to Customers by Rhode Island Energy |
| 1 Residential New Construction (Electric) | \$562,042 | \$0 | \$562,042 | \$240,176 | \$146,579 | \$386,754 | \$948,797 |
| 2 ENERGY STAR HVAC (Electric) | \$3,832,864 | \$0 | \$3,832,864 | \$1,074,728 | \$258,959 | \$1,333,688 | \$5,166,551 |
| 3 EnergyWise (Electric) | \$12,691,474 | \$0 | \$12,691,474 | \$2,244,321 | \$553,960 | \$2,798,281 | \$15,489,755 |
| 4 EnergyWise Multi Family (Electric) | \$401,010 | \$0 | \$401,010 | \$232,485 | \$118,878 | \$351,363 | \$752,372 |
| 5 Home Energy Reports (Electric) | \$0 | \$0 | \$0 | \$2,202,010 | \$58,862 | \$2,260,872 | \$2,260,872 |
| 6 ENERGY STAR Lighting (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 7 Residential Consumer Products (Electric) | \$608,747 | \$0 | \$608,747 | \$987,516 | \$137,999 | \$1,125,515 | \$1,734,262 |
| 8 Residential ConnectedSolutions (Electric) | \$2,692,488 | \$0 | \$2,692,488 | \$542,665 | \$78,419 | \$621,084 | \$3,313,573 |
| 9 Energy Efficiency Education Programs (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 10 Residential Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 11 Community Based Initiatives - Residential (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 12 Comprehensive Marketing Residential (Electric) | \$0 | \$0 | \$0 | \$316,240 | \$20,732 | \$336,972 | \$336,972 |
| 13 Subtotal Non-Income Eligible Residential | \$20,788,625 | \$0 | \$20,788,625 | \$7,840,142 | \$1,374,388 | \$9,214,530 | \$30,003,154 |
| 14 Single Family - Income Eligible Services (Electric) | \$10,576,252 | \$0 | \$10,576,252 | \$1,950,254 | \$417,097 | \$2,367,351 | \$12,943,603 |
| 15 Income Eligible Multifamily (Electric) | \$1,277,527 | \$0 | \$1,277,527 | \$191,309 | \$146,647 | \$337,955 | \$1,615,482 |
| 16 Subtotal Income Eligible Residential | \$11,853,779 | \$0 | \$11,853,779 | \$2,141,563 | \$563,744 | \$2,705,306 | \$14,559,085 |
| 17 Large Commercial New Construction (Electric) | \$4,594,528 | \$1,938,151 | \$2,656,377 | \$1,634,362 | \$280,726 | \$1,915,088 | \$4,571,466 |
| 18 Large Commercial Retrofit (Electric) | \$21,539,293 | \$1,135,749 | \$20,403,544 | \$3,395,583 | \$698,854 | \$4,094,437 | \$24,497,981 |
| 19 Small Business Direct Install (Electric) | \$4,688,819 | \$0 | \$4,688,819 | \$354,930 | \$210,329 | \$565,259 | \$5,254,077 |
| 20 Commercial ConnectedSolutions (Electric) | \$4,920,493 | \$0 | \$4,920,493 | \$480,433 | \$115,013 | \$595,446 | \$5,515,938 |
| 21 Commercial Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 22 Community Based Initiatives - C&I (Electric) | \$0 | \$0 | \$0 | \$975 | \$0 | \$975 | \$975 |
| 23 Finance Costs (Electric) | \$5,737,491 | \$0 | \$5,737,491 | \$0 | \$0 | \$0 | \$5,737,491 |
| 24 Commercial Workforce Development (Electric) | \$0 | \$0 | \$0 | \$8,822 | \$0 | \$8,822 | \$8,822 |
| 25 Subtotal Commercial & Industrial | \$41,480,624 | \$3,073,900 | \$38,406,724 | \$5,875,105 | \$1,304,922 | \$7,180,026 | \$45,586,750 |
| 26 OER (Electric) | \$0 | \$0 | \$0 | \$891,394 | \$0 | \$891,394 | \$891,394 |
| 27 EERMC (Electric) | \$0 | \$0 | \$0 | \$574,471 | \$0 | \$574,471 | \$574,471 |
| 28 Subtotal Regulatory | \$0 | \$0 | \$0 | \$1,465,865 | \$0 | \$1,465,865 | \$1,465,865 |
| 29 TOTAL All Sectors | \$74,123,027 | \$3,073,900 | \$71,049,127 | \$17,322,674 | \$3,243,053 | \$20,565,727 | \$91,614,854 |
| SRP PROGRAMS (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| OTHER COSTS NOT LISTED ABOVE (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |

¹ The Company's accounting system treats all payments made directly to customers and vendors as one category of vendor expenses.

Rebates paid to customers through service contracts with vendors are included in the service cost of the vendor.

² Prior to 2020, this column was labeled as "Rebates and Other Customer Incentives" in annual reports and plans.

³ This cost category includes service costs for customers plus rebates/incentives processed and paid to customers by the vendor, but excludes rebates paid directly to customers by the Company in col (b).

⁴ The term "External Costs" has been used in Company reports to identify a subset of vendor costs not included in "Rebates and Other Customer Incentives".

⁵ In the 2020 Year End Report, Home Energy Reports were categorized under column (c) in this schedule. Starting with the Year End Report, Home Energy Reports costs categorized under column (c) are now categorized under column (d).

CORRECTED

Schedule 4 - Program Planning & Administration

| | (a) (b)+(e)+(h) | (b) (c)+(d) | (c) | (d) | (e) (f)+(g) | (f) | (g) | (h) (i)+(j) | (i) | (j) | (h) (i)+(j) | (i) | (j) |
|---|--------------------|---------------------------------------|----------------------------------|-------------------------------------|---|--|---|-------------------------|--------------------------------|--|----------------------|--------------------|--|
| | Total Costs | Total Rhode Island Energy Labor Costs | Rhode Island Energy Direct Labor | Rhode Island Energy Allocated Labor | Total Rhode Island Energy Employee Expenses | Rhode Island Energy Direct Employee Expenses | Rhode Island Energy Allocated Employee Expenses | External Services Costs | Direct External Services Costs | External Services Costs Originating from an Allocation | Other Costs (if any) | Other Direct Costs | Other Costs Originating from an Allocation |
| 1 Residential New Construction (Electric) | \$154,790 | \$54,004 | \$14,310 | \$39,694 | \$468 | \$0 | \$468 | \$100,318 | \$0 | \$100,318 | \$0 | \$0 | \$0 |
| 2 ENERGY STAR HVAC (Electric) | \$377,603 | \$168,097 | \$85,339 | \$82,758 | \$975 | \$0 | \$975 | \$208,531 | -\$624 | \$209,155 | \$0 | \$0 | \$0 |
| 3 EnergyWise (Electric) | \$568,039 | \$168,458 | \$11,086 | \$157,372 | \$1,855 | \$0 | \$1,855 | \$397,725 | \$0 | \$397,725 | \$0 | \$0 | \$0 |
| 4 EnergyWise Multi Family (Electric) | \$194,811 | \$92,279 | \$51,897 | \$40,382 | \$476 | \$0 | \$476 | \$102,056 | \$0 | \$102,056 | \$0 | \$0 | \$0 |
| 5 Home Energy Reports (Electric) | \$55,251 | \$15,612 | \$0 | \$15,612 | \$184 | \$0 | \$184 | \$39,456 | \$0 | \$39,456 | \$0 | \$0 | \$0 |
| 6 ENERGY STAR Lighting (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 7 Residential Consumer Products (Electric) | \$220,097 | \$73,497 | \$35,340 | \$38,156 | \$450 | \$0 | \$450 | \$146,150 | \$49,718 | \$96,432 | \$0 | \$0 | \$0 |
| 8 Residential ConnectedSolutions (Electric) | \$103,718 | \$26,415 | \$72 | \$26,343 | \$310 | \$0 | \$310 | \$76,992 | \$10,416 | \$66,576 | \$0 | \$0 | \$0 |
| 9 Energy Efficiency Education Programs (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 10 Residential Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 11 Community Based Initiatives - Residential (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 12 Comprehensive Marketing Residential (Electric) | \$1,338 | \$378 | \$0 | \$378 | \$4 | \$0 | \$4 | \$956 | \$0 | \$956 | \$0 | \$0 | \$0 |
| 13 Subtotal Non-Income Eligible Residential | \$1,675,647 | \$598,740 | \$198,045 | \$400,695 | \$4,723 | \$0 | \$4,723 | \$1,072,184 | \$59,510 | \$1,012,674 | \$0 | \$0 | \$0 |
| 14 Single Family - Income Eligible Services (Electric) | \$536,322 | \$171,361 | \$27,832 | \$143,529 | \$1,692 | \$0 | \$1,692 | \$363,270 | \$531 | \$362,739 | \$0 | \$0 | \$0 |
| 15 Income Eligible Multifamily (Electric) | \$221,290 | \$95,111 | \$45,416 | \$49,695 | \$586 | \$0 | \$586 | \$125,594 | \$0 | \$125,594 | \$0 | \$0 | \$0 |
| 16 Subtotal Income Eligible Residential | \$757,613 | \$266,472 | \$73,248 | \$193,224 | \$2,277 | \$0 | \$2,277 | \$488,864 | \$531 | \$488,333 | \$0 | \$0 | \$0 |
| 17 Large Commercial New Construction (Electric) | \$234,280 | \$81,415 | \$0 | \$81,415 | \$520 | \$0 | \$520 | \$152,345 | \$683 | \$151,662 | \$0 | \$0 | \$0 |
| 18 Large Commercial Retrofit (Electric) | \$787,379 | \$260,083 | \$59 | \$260,024 | \$1,662 | \$0 | \$1,662 | \$525,634 | \$41,258 | \$484,377 | \$0 | \$0 | \$0 |
| 19 Small Business Direct Install (Electric) | \$268,260 | \$94,778 | \$10 | \$94,768 | \$606 | \$0 | \$606 | \$172,877 | -\$3,658 | \$176,535 | \$0 | \$0 | \$0 |
| 20 Commercial ConnectedSolutions (Electric) | \$679,758 | \$84,597 | \$23,219 | \$61,378 | \$392 | \$0 | \$392 | \$594,769 | \$480,433 | \$114,336 | \$0 | \$0 | \$0 |
| 21 Commercial Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 22 Community Based Initiatives - C&I (Electric) | \$113 | \$0 | \$0 | \$0 | \$113 | \$113 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 23 Finance Costs (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 24 Commercial Workforce Development (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 25 Subtotal Commercial & Industrial | \$1,969,791 | \$520,872 | \$23,288 | \$497,584 | \$3,294 | \$113 | \$3,181 | \$1,445,625 | \$518,716 | \$926,909 | \$0 | \$0 | \$0 |
| 26 OER (Electric) | \$891,394 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$891,394 | \$891,394 | \$0 | \$0 | \$0 | \$0 |
| 27 EERMC (Electric) | \$565,815 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$565,815 | \$565,815 | \$0 | \$0 | \$0 | \$0 |
| 28 Subtotal Regulatory | \$1,457,209 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$1,457,209 | \$1,457,209 | \$0 | \$0 | \$0 | \$0 |
| 29 TOTAL All Sectors | \$5,860,260 | \$1,386,085 | \$294,581 | \$1,091,503 | \$10,294 | \$113 | \$10,181 | \$4,463,881 | \$2,035,966 | \$2,427,915 | \$0 | \$0 | \$0 |
| SRP PROGRAMS (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| OTHER COSTS NOT LISTED ABOVE (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |

CORRECTED

Schedule 5 - Marketing

| | (a) (b)+(e)+(h)+(k) | (b) (c)+(d) | (c) | (d) | (e) (f)+(g) | (f) | (g) | (h) (i)+(j) | (i) | (j) | (k) (l)+(m) | (l) | (m) |
|---|------------------------|---------------------------------------|----------------------------------|-------------------------------------|---|--|---|-------------------------|--------------------------------|--|----------------------|--------------------|--|
| | Total Costs | Total Rhode Island Energy Labor Costs | Rhode Island Energy Direct Labor | Rhode Island Energy Allocated Labor | Total Rhode Island Energy Employee Expenses | Rhode Island Energy Direct Employee Expenses | Rhode Island Energy Allocated Employee Expenses | External Services Costs | Direct External Services Costs | External Services Costs Originating from an Allocation | Other Costs (if any) | Other Direct Costs | Other Costs Originating from an Allocation |
| 1 Residential New Construction (Electric) | \$1,527 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$1,527 | \$0 | \$1,527 | \$0 | \$0 | \$0 |
| 2 ENERGY STAR HVAC (Electric) | \$280,177 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$280,177 | \$262,381 | \$17,796 | \$0 | \$0 | \$0 |
| 3 EnergyWise (Electric) | \$313,535 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$313,535 | \$290,807 | \$22,729 | \$0 | \$0 | \$0 |
| 4 EnergyWise Multi Family (Electric) | \$75,932 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$75,932 | \$71,595 | \$4,336 | \$0 | \$0 | \$0 |
| 5 Home Energy Reports (Electric) | \$845 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$845 | \$0 | \$845 | \$0 | \$0 | \$0 |
| 6 ENERGY STAR Lighting (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 7 Residential Consumer Products (Electric) | \$416,332 | \$17 | \$17 | \$0 | \$0 | \$0 | \$0 | \$416,315 | \$388,975 | \$27,340 | \$0 | \$0 | \$0 |
| 8 Residential ConnectedSolutions (Electric) | \$734 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$734 | \$0 | \$734 | \$0 | \$0 | \$0 |
| 9 Energy Efficiency Education Programs (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 10 Residential Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 11 Community Based Initiatives - Residential (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 12 Comprehensive Marketing Residential (Electric) | \$336,016 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$336,016 | \$316,240 | \$19,777 | \$0 | \$0 | \$0 |
| 13 Subtotal Non-income Eligible Residential | \$1,425,098 | \$17 | \$17 | \$0 | \$0 | \$0 | \$0 | \$1,425,081 | \$1,329,997 | \$95,084 | \$0 | \$0 | \$0 |
| 14 Single Family - Income Eligible Services (Electric) | \$161,926 | -\$3 | -\$3 | \$0 | \$0 | \$0 | \$0 | \$161,929 | \$153,483 | \$8,446 | \$0 | \$0 | \$0 |
| 15 Income Eligible Multifamily (Electric) | \$8,270 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$8,270 | \$7,357 | \$914 | \$0 | \$0 | \$0 |
| 16 Subtotal Income Eligible Residential | \$170,196 | -\$3 | -\$3 | \$0 | \$0 | \$0 | \$0 | \$170,199 | \$160,839 | \$9,360 | \$0 | \$0 | \$0 |
| 17 Large Commercial New Construction (Electric) | \$184,897 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$184,897 | \$184,897 | \$0 | \$0 | \$0 | \$0 |
| 18 Large Commercial Retrofit (Electric) | \$150,175 | \$0 | \$0 | \$0 | \$142 | \$142 | \$0 | \$150,032 | \$150,032 | \$0 | \$0 | \$0 | \$0 |
| 19 Small Business Direct Install (Electric) | \$214,869 | \$91 | \$91 | \$0 | \$0 | \$0 | \$0 | \$214,778 | \$214,778 | \$0 | \$0 | \$0 | \$0 |
| 20 Commercial ConnectedSolutions (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 21 Commercial Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 22 Community Based Initiatives - C&I (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 23 Finance Costs (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 24 Commercial Workforce Development (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 25 Subtotal Commercial & Industrial | \$549,940 | \$91 | \$91 | \$0 | \$142 | \$142 | \$0 | \$549,707 | \$549,707 | \$0 | \$0 | \$0 | \$0 |
| 26 OER (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 27 EERMC (Electric) | \$8,656 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$8,656 | \$8,656 | \$0 | \$0 | \$0 | \$0 |
| 28 Subtotal Regulatory | \$8,656 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$8,656 | \$8,656 | \$0 | \$0 | \$0 | \$0 |
| 29 TOTAL All Sectors | \$2,153,891 | \$105 | \$105 | \$0 | \$142 | \$142 | \$0 | \$2,153,644 | \$2,049,200 | \$104,444 | \$0 | \$0 | \$0 |
| SRP PROGRAMS (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| OTHER COSTS NOT LISTED ABOVE (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |

CORRECTED

Schedule 6 - Cost of services and product rebates/incentives provided to customers (1)

Annual threshold > \$100,000 for evaluation of allocation between Col. (b) vs. Col. (c)

Default Assumption, expenses allocated to Col. (c)

| | (a) (b)+(c) | (b) | (c) | (d) |
|---|---|--|---|--|
| | Total payments for services and product rebates/incentives for customers which are paid directly to a customer or provided to customer via a vendor | Rebate/Incentive Payments Directly Paid to Customers | Product Rebates/Incentives for customers which are made to vendors and then | Description of External Payments |
| 1 Residential New Construction (Electric) | \$562,042 | \$0 | \$562,042 | Payments are made to external vendor(s) that are then used to provide rebates to customers for approved energy efficiency products that are installed in new customer dwellings. Payments also include a home performance testing service at no cost to the customer. |
| 2 ENERGY STAR HVAC (Electric) | \$3,832,864 | \$0 | \$3,832,864 | Payments are made to external vendor(s) that are then used to provide rebates to customers for approved energy efficiency HVAC products that are installed in rate payer customer dwellings. Payments are also made to external vendor(s) that are then used to provide zero interest loans to customers for approved energy efficiency HVAC products. |
| 3 EnergyWise (Electric) | \$12,691,474 | \$0 | \$12,691,474 | Payments are made to external vendor(s) that are then used to discount approved energy efficiency products that are installed in single family customer dwellings. Payments also include a service to customers in the form of no cost energy assessments. Payments are also made to external vendor(s) that are then used to provide zero interest loans to customers for weatherization. |
| 4 EnergyWise Multi Family (Electric) | \$401,010 | \$0 | \$401,010 | Payments are made to external vendors that are then used to discount approved energy efficiency products that are installed in multifamily customer dwellings. Payments also include a service to customers in the form of no cost energy assessments. Payments are also made to external vendor(s) that are then used to provide zero interest loans to customers for weatherization. |
| 5 Home Energy Reports (Electric) | \$0 | \$0 | \$0 | Payments include costs associated with the delivery of the program. The HER program does not feature direct customer incentives or rebates. Instead the funds in this category are utilized in the production and delivery of Home Energy Reports. The costs associated with this effort are categorized as 'Rebates and Other Incentives' because the reports drive customer actions to change energy consumption behaviors, resulting in energy cost savings to those customers and benefits to all customers. |
| 6 ENERGY STAR Lighting (Electric) | \$0 | \$0 | \$0 | Payments are made to external vendors that are then used to discount approved EnergyStar Lighting Products. Customers then purchase these EnergyStar Lighting products at a discounted price. |
| 7 Residential Consumer Products (Electric) | \$608,747 | \$0 | \$608,747 | Payments are made to external vendors that are then used to discount approved EnergyStar Appliance products. Customers then purchase these EnergyStar Appliance products at a discounted price. Payments are also made to external vendor(s) that are then used to provide rebates to customers who purchase approved EnergyStar Appliance products. |
| 8 Residential ConnectedSolutions (Electric) | \$2,692,488 | \$0 | \$2,692,488 | Payments are made to external vendor(s) that are then used to pay customers an incentive for participation in the program. In some cases, customers have elected to receive their incentive payment directly from Rhode Island Energy, in these cases the Company directly pays the customer the incentive. |
| 9 Energy Efficiency Education Programs (Electric) | \$0 | \$0 | \$0 | N/A |
| 10 Residential Pilots (Electric) | \$0 | \$0 | \$0 | Payments can vary depending on the pilot. In 2018 the only Residential Electric was the Zero Energy Homes pilot. For this pilot, payments are made to external vendor(s) that are then used to provide rebates to customers for approved energy efficiency products that are installed in new customer dwellings. Payments also include a home performance testing service at no cost to the customer. |
| 11 Community Based Initiatives - Residential (Electric) | \$0 | \$0 | \$0 | Payments can either either be made directly to a community or payments can be made to external vendor(s) that are then used to discount approved energy efficiency products for communities participating in the Community Based Initiative. |
| 12 Comprehensive Marketing Residential (Electric) | \$0 | \$0 | \$0 | N/A |
| 13 Subtotal Non-Income Eligible Residential | \$20,788,625 | \$0 | \$20,788,625 | |
| 14 Single Family - Income Eligible Services (Electric) | \$10,576,252 | \$0 | \$10,576,252 | Payments are made to external vendors that are then used to cover 100% of the cost for approved energy efficiency products that are installed in single family income eligible customer dwellings. Payments also include a no cost service to customers in the form of no cost energy assessments. |
| 15 Income Eligible Multifamily (Electric) | \$1,277,527 | \$0 | \$1,277,527 | Payments are made to external vendors that are then used to cover 100% of the cost for approved energy efficiency products that are installed in multifamily customer dwellings. Payments also include a no cost service to customers in the form of no cost energy assessments. |
| 16 Subtotal Income Eligible Residential | \$11,853,779 | \$0 | \$11,853,779 | |
| 17 Large Commercial New Construction (Electric) | \$4,594,528 | \$1,938,151 | \$2,656,377 | Payments are made to external vendor(s) that are then used to discount approved energy efficiency products that are installed in customer facilities. Payments are also made directly to customers for the installation of approved energy efficiency measures. |
| 18 Large Commercial Retrofit (Electric) | \$21,539,293 | \$1,135,749 | \$20,403,544 | Payments are made to external vendor(s) that are then used to discount approved energy efficiency products that are installed in customer facilities. Payments are also made directly to customers for the installation of approved energy efficiency measures. |
| 19 Small Business Direct Install (Electric) | \$4,688,819 | \$0 | \$4,688,819 | Payments are made to external vendor(s) that are then used to discount approved energy efficiency products that are installed in customer facilities. Payments are also made directly to customers for the installation of approved energy efficiency measures. Payments also include no cost services to customers including no cost energy assessments. |
| 20 Commercial ConnectedSolutions (Electric) | \$4,920,493 | \$0 | \$4,920,493 | Payments are made to external vendor(s) that are then used to pay customers an incentive for participation in the program. The external vendor(s) retain a portion of the incentive payments. |
| 21 Commercial Pilots (Electric) | \$0 | \$0 | \$0 | Payments can vary depending on the pilot. In 2018 the only Commercial Electric pilot was the Zero Energy Buildings pilot. For this pilot, incentive payments are made directly to customers. Payments also include building verification and certification for Zero Buildings, at no cost to the customer. |
| 22 Community Based Initiatives - C&I (Electric) | \$0 | \$0 | \$0 | Payments can either either be made directly to a municipality or payments can be made to external vendor(s) that are then used to discount approved energy efficiency products for communities participating in the Community Based Initiative. |
| 23 Finance Costs (Electric) | \$5,737,491 | \$0 | \$5,737,491 | Payments made to the Rhode Island Infrastructure Bank are leveraged and lent to municipalities to cover the municipality's net costs of an energy efficiency project. Costs may include energy efficiency equipment and related services. |
| 24 Commercial Workforce Development (Electric) | \$0 | \$0 | \$0 | Payments made to the Rhode Island Infrastructure Bank are leveraged and lent to municipalities to cover the municipality's net costs of an energy efficiency project. Costs may include energy efficiency equipment and related services. |
| 25 Subtotal Commercial & Industrial | \$41,480,624 | \$3,073,900 | \$38,406,724 | |
| 26 OER (Electric) | \$0 | \$0 | \$0 | |
| 27 EERMC (Electric) | \$0 | \$0 | \$0 | |
| 28 Subtotal Regulatory | \$0 | \$0 | \$0 | |
| TOTAL All Sectors | \$74,123,027 | \$3,073,900 | \$71,049,127 | |
| SRP PROGRAMS (Electric) | \$0 | | \$0 | |
| OTHER COSTS NOT LISTED ABOVE (Electric) | \$0 | | \$0 | |

(1) In the 2020 Energy Efficiency Annual Plan filing, this cost category was referred to as "Rebates and Other Incentives"

CORRECTED

Schedule 7 - Sales, Technical Assistance & Training (STAT)

| | (a) (b)+(e)+(h)+(k) | (b) (c)+(d) | (c) | (d) | (e) (f)+(g) | (f) | (g) | (h) (i)+(j) | (i) | (j) | (k) (l)+(m) | (l) | (m) |
|---|------------------------|---------------------------------------|----------------------------------|-------------------------------------|---|--|---|-------------------------|--------------------------------|--|----------------------|--------------------|--|
| | Total Costs | Total Rhode Island Energy Labor Costs | Rhode Island Energy Direct Labor | Rhode Island Energy Allocated Labor | Total Rhode Island Energy Employee Expenses | Rhode Island Energy Direct Employee Expenses | Rhode Island Energy Allocated Employee Expenses | External Services Costs | Direct External Services Costs | External Services Costs Originating from an Allocation | Other Costs (if any) | Other Direct Costs | Other Costs Originating from an Allocation |
| 1 Residential New Construction (Electric) | \$207,977 | \$2,118 | \$0 | \$2,118 | \$157 | \$0 | \$157 | \$205,702 | \$203,731 | \$1,971 | \$0 | \$0 | \$0 |
| 2 ENERGY STAR HVAC (Electric) | \$797,658 | \$3,576 | \$232 | \$3,344 | \$248 | \$0 | \$248 | \$793,835 | \$790,722 | \$3,112 | \$0 | \$0 | \$0 |
| 3 EnergyWise (Electric) | \$1,867,674 | \$6,273 | \$348 | \$5,925 | \$440 | \$0 | \$440 | \$1,860,961 | \$1,855,445 | \$5,515 | \$0 | \$0 | \$0 |
| 4 EnergyWise Multi Family (Electric) | \$86,493 | \$561 | \$0 | \$561 | \$42 | \$0 | \$42 | \$85,890 | \$85,368 | \$522 | \$0 | \$0 | \$0 |
| 5 Home Energy Reports (Electric) | \$2,215,891 | \$8,331 | \$0 | \$8,331 | \$618 | \$0 | \$618 | \$2,206,942 | \$2,199,187 | \$7,755 | \$0 | \$0 | \$0 |
| 6 ENERGY STAR Lighting (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 7 Residential Consumer Products (Electric) | \$550,491 | \$2,775 | \$0 | \$2,775 | \$206 | \$0 | \$206 | \$547,510 | \$544,928 | \$2,583 | \$0 | \$0 | \$0 |
| 8 Residential ConnectedSolutions (Electric) | \$574,027 | \$41,462 | \$40,064 | \$1,398 | \$104 | \$0 | \$104 | \$532,461 | \$531,160 | \$1,301 | \$0 | \$0 | \$0 |
| 9 Energy Efficiency Education Programs (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 10 Residential Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 11 Community Based Initiatives - Residential (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 12 Comprehensive Marketing Residential (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 13 Subtotal Non-Income Eligible Residential | \$6,300,210 | \$65,095 | \$40,644 | \$24,451 | \$1,814 | \$0 | \$1,814 | \$6,233,301 | \$6,210,541 | \$22,760 | \$0 | \$0 | \$0 |
| 14 Single Family - Income Eligible Services (Electric) | \$1,780,816 | \$7,595 | \$0 | \$7,595 | \$563 | \$0 | \$563 | \$1,772,657 | \$1,765,587 | \$7,070 | \$0 | \$0 | \$0 |
| 15 Income Eligible Multifamily (Electric) | \$179,674 | \$2,133 | \$0 | \$2,133 | \$158 | \$0 | \$158 | \$177,383 | \$175,397 | \$1,985 | \$0 | \$0 | \$0 |
| 16 Subtotal Income Eligible Residential | \$1,960,490 | \$9,728 | \$0 | \$9,728 | \$722 | \$0 | \$722 | \$1,950,040 | \$1,940,985 | \$9,055 | \$0 | \$0 | \$0 |
| 17 Large Commercial New Construction (Electric) | \$1,518,941 | \$379,035 | \$98,097 | \$280,938 | \$4,016 | \$62 | \$3,954 | \$1,135,890 | \$1,128,190 | \$7,701 | \$0 | \$0 | \$0 |
| 18 Large Commercial Retrofit (Electric) | \$3,546,352 | \$887,458 | \$156,127 | \$731,331 | \$10,292 | \$0 | \$10,292 | \$2,648,602 | \$2,628,555 | \$20,046 | \$0 | \$0 | \$0 |
| 19 Small Business Direct Install (Electric) | \$69,421 | \$52,346 | \$5,079 | \$47,267 | \$665 | \$0 | \$665 | \$16,410 | \$15,115 | \$1,295 | \$0 | \$0 | \$0 |
| 20 Commercial ConnectedSolutions (Electric) | \$26,064 | \$25,040 | \$343 | \$24,697 | \$348 | \$0 | \$348 | \$677 | \$0 | \$677 | \$0 | \$0 | \$0 |
| 21 Commercial Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 22 Community Based Initiatives - C&I (Electric) | \$13,902 | \$12,502 | \$12,502 | \$0 | \$425 | \$425 | \$0 | \$975 | \$975 | \$0 | \$0 | \$0 | \$0 |
| 23 Finance Costs (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 24 Commercial Workforce Development (Electric) | \$9,328 | \$0 | \$0 | \$0 | \$506 | \$506 | \$0 | \$8,822 | \$8,822 | \$0 | \$0 | \$0 | \$0 |
| 25 Subtotal Commercial & Industrial | \$5,184,009 | \$1,356,380 | \$272,147 | \$1,084,233 | \$16,252 | \$994 | \$15,258 | \$3,811,376 | \$3,781,657 | \$29,720 | \$0 | \$0 | \$0 |
| 26 OER (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 27 EERMC (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 28 Subtotal Regulatory | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 29 TOTAL All Sectors | \$13,444,708 | \$1,431,203 | \$312,791 | \$1,118,412 | \$18,788 | \$994 | \$17,794 | \$11,994,717 | \$11,933,182 | \$61,535 | \$0 | \$0 | \$0 |
| SRP PROGRAMS (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| OTHER COSTS NOT LISTED ABOVE (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |

CORRECTED

Schedule 8 - Evaluation & Market Research

| | (a) (b)+(e)+(h)+(k) | (b) (c)+(d) | (c) | (d) | (e) (f)+(g) | (f) | (g) | (h) (i)+(j) | (i) | (j) | (k) (l)+(m) | (l) | (m) |
|---|------------------------|---------------------------------------|----------------------------------|-------------------------------------|---|--|---|-------------------------|--------------------------------|--|----------------------|--------------------|--|
| | Total Costs | Total Rhode Island Energy Labor Costs | Rhode Island Energy Direct Labor | Rhode Island Energy Allocated Labor | Total Rhode Island Energy Employee Expenses | Rhode Island Energy Direct Employee Expenses | Rhode Island Energy Allocated Employee Expenses | External Services Costs | Direct External Services Costs | External Services Costs Originating from an Allocation | Other Costs (if any) | Other Direct Costs | Other Costs Originating from an Allocation |
| 1 Residential New Construction (Electric) | \$79,212 | \$5 | \$3 | \$2 | \$0 | \$0 | \$0 | \$79,207 | \$36,445 | \$42,762 | \$0 | \$0 | \$0 |
| 2 ENERGY STAR HVAC (Electric) | \$51,159 | \$14 | \$13 | \$1 | \$0 | \$0 | \$0 | \$51,145 | \$22,249 | \$28,896 | \$0 | \$0 | \$0 |
| 3 EnergyWise (Electric) | \$226,066 | \$6 | \$0 | \$6 | \$0 | \$0 | \$0 | \$226,060 | \$98,069 | \$127,991 | \$0 | \$0 | \$0 |
| 4 EnergyWise Multi Family (Electric) | \$87,488 | \$2 | \$2 | \$1 | \$0 | \$0 | \$0 | \$87,485 | \$75,522 | \$11,963 | \$0 | \$0 | \$0 |
| 5 Home Energy Reports (Electric) | \$13,630 | \$1 | \$0 | \$1 | \$0 | \$0 | \$0 | \$13,629 | \$2,823 | \$10,806 | \$0 | \$0 | \$0 |
| 6 ENERGY STAR Lighting (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 7 Residential Consumer Products (Electric) | \$15,540 | \$1 | \$0 | \$1 | \$0 | \$0 | \$0 | \$15,540 | \$3,895 | \$11,644 | \$0 | \$0 | \$0 |
| 8 Residential ConnectedSolutions (Electric) | \$10,897 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$10,897 | \$1,089 | \$9,808 | \$0 | \$0 | \$0 |
| 9 Energy Efficiency Education Programs (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 10 Residential Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 11 Community Based Initiatives - Residential (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 12 Comprehensive Marketing Residential (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 13 Subtotal Non-Income Eligible Residential | \$483,993 | \$29 | \$18 | \$12 | \$0 | \$0 | \$0 | \$483,963 | \$240,094 | \$243,869 | \$0 | \$0 | \$0 |
| 14 Single Family - Income Eligible Services (Electric) | \$69,497 | \$2 | \$0 | \$2 | \$0 | \$0 | \$0 | \$69,495 | \$30,653 | \$38,842 | \$0 | \$0 | \$0 |
| 15 Income Eligible Multifamily (Electric) | \$26,711 | \$2 | \$1 | \$1 | \$0 | \$0 | \$0 | \$26,709 | \$8,555 | \$18,154 | \$0 | \$0 | \$0 |
| 16 Subtotal Income Eligible Residential | \$96,208 | \$4 | \$1 | \$3 | \$0 | \$0 | \$0 | \$96,204 | \$39,207 | \$56,996 | \$0 | \$0 | \$0 |
| 17 Large Commercial New Construction (Electric) | \$442,057 | \$101 | \$0 | \$101 | \$0 | \$0 | \$0 | \$441,956 | \$320,593 | \$121,363 | \$0 | \$0 | \$0 |
| 18 Large Commercial Retrofit (Electric) | \$770,330 | \$162 | \$0 | \$162 | \$0 | \$0 | \$0 | \$770,168 | \$575,737 | \$194,431 | \$0 | \$0 | \$0 |
| 19 Small Business Direct Install (Electric) | \$161,221 | \$27 | \$0 | \$27 | \$0 | \$0 | \$0 | \$161,193 | \$128,695 | \$32,498 | \$0 | \$0 | \$0 |
| 20 Commercial ConnectedSolutions (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 21 Commercial Pilots (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 22 Community Based Initiatives - C&I (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 23 Finance Costs (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 24 Commercial Workforce Development (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 25 Subtotal Commercial & Industrial | \$1,373,608 | \$290 | \$0 | \$290 | \$0 | \$0 | \$0 | \$1,373,318 | \$1,025,025 | \$348,293 | \$0 | \$0 | \$0 |
| 26 OER (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 27 EERMC (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 28 Subtotal Regulatory | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 29 TOTAL All Sectors | \$1,953,808 | \$323 | \$19 | \$305 | \$0 | \$0 | \$0 | \$1,953,485 | \$1,304,326 | \$649,159 | \$0 | \$0 | \$0 |
| SRP PROGRAMS (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| OTHER COSTS NOT LISTED ABOVE (Electric) | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |

CORRECTED

Schedule 9 - Shared Cross-Jurisdictional Costs (Non-Labor)

>\$100,000 only for Rhode Island

(Non-Labor Services/Costs that are Shared with Other Jurisdictions and are Allocated to Rhode Island)

| | (a) | (b) (c)x(a) | (b) (c)x(a) | (b) (c)x(a) | (c) | (c) | (c) | (d) | (e) | (f) |
|-----------------------------|---|---------------------------------|----------------------------|---------------------------|-------------------|--------------|-------------|------------|---------------|---------------------------------------|
| Description of Service/Cost | Total Cost Used as Basis for Allocation | Total Allocated to Rhode Island | Total Allocated to RI-ELEC | Total Allocated to RI-GAS | % to Rhode Island | % to RI-ELEC | % to RI-GAS | % to Mass. | % to New York | Description of Allocation Methodology |
| 1 NO LONGER APPLICABLE | \$0 | \$0 | \$0 | \$0 | 0% | 0% | 0% | 0% | 0% | N/A |

CORRECTED

Schedule 10 - Methods for Allocating Electric Costs >\$500,000 Across Rhode Island Programs/Sectors

| | (a) | (b) | (c) | (d) | (f) |
|---|----------------------|--|--|----------------------------|--|
| Description of Cost Allocated | Total Cost Allocated | Allocation to Non-Income Eligible Residential Programs | Allocation to Income Eligible Residential Programs | Allocation to C&I Programs | Description of Allocation Methodology |
| 1 IBM Costs for InDemand Releases - RI-ELEC | \$1,017,764 | \$0 | \$202,647 | \$158,907 | Based on PP&A Budgets of Programs Designated To Receive Allocations |
| 2 Guidehouse - Allocated to 8419 - ALL PROGRAMS | \$850,599 | \$99 | \$99 | \$99 | Based on PP&A Budgets of Programs Designated To Receive Allocations |
| 3 | | | | | |
| 4 | | | | | |
| 5 Labor Allocated to PP&A | \$1,091,863 | \$400,836 | \$193,291 | \$497,736 | Based on PP&A Budgets of Programs Designated To Receive Allocations |
| 6 Labor Allocated to Marketing | \$0 | \$0 | \$0 | \$0 | Based on Marketing Budgets of Programs Designated To Receive Allocations |
| 7 Labor Allocated to STAT | \$1,118,412 | \$24,451 | \$9,728 | \$1,084,233 | Based on STAT Budgets of Programs Designated To Receive Allocations |
| 8 Labor Allocated to Evaluation & Market Research | \$305 | \$12 | \$3 | \$290 | Based on Evaluation & Marketing Research Budgets of Programs Designated To Receive Allocations |
| 9 ALLOCATED LABOR - RI-ELEC TOTAL | \$2,210,580 | \$425,298 | \$203,022 | \$1,582,260 | |

Attachment 6 (Corrected)
2021-2023 Performance Comparison

CORRECTED

2021-2023 Three-Year Plan Comparison

The following tables compare planned to actual energy savings, benefits, implementation expenses, and performance incentives for the 2021-23 three-year planning cycle. 2021, 2022, and 2023 planned and actual values were sourced directly from the most up-to-date tables filed in dockets 5076, 5189, and 22-33-EE, respectively. Please see the table below for specific sources:

| | Planned | Actual |
|--------------------------------|---|---|
| 2021 Electric, Docket 5076 | The compliance filing provides an updated implementation budget for Year 1 (2021) and updated goals, targets, and proposed energy efficiency rates for Year 1 | RI Energy's Year-End Report with Confidential Vendor Schedules and Gas Overspend Memo |
| 2021 Gas, Docket 5076 | | |
| 2022 Electric, Docket 5189 | National Grid's Second Revised Updated Tables | RI Energy's 2022 Year-End Report - Updated Electric and Gas Tables |
| 2022 Gas, Docket 5189 | | |
| 2023 Electric. Docket 22-33-EE | Compliance Filing for Conversion of Electric Resistance Heating | 2023 Energy Efficiency Year-End Report (this filing), Attachments 1 and 2 |
| 2023 Gas. Docket 22-33-EE | Updated Compliance Filing | |

Comparison of 2021 Planned and Actual Electric Savings

| | (a) | (b) | (c) | (d) | (e) | (f) |
|--|----------------------------|---------------------------|--------------------|------------------------------|-----------------------------|----------------------|
| Planned Program Name | Planned Annual MWh Savings | Actual Annual MWh Savings | Annual Achievement | Planned Lifetime MWh Savings | Actual Lifetime MWh Savings | Lifetime Achievement |
| 1 Large Commercial New Construction | 11,837 | 13,527 | 114.3% | 189,441 | 203,780 | 107.6% |
| 2 Large Commercial Retrofit | 59,496 | 42,289 | 71.1% | 744,562 | 450,665 | 60.5% |
| 3 Small Business Direct Install | 9,696 | 9,616 | 99.2% | 105,134 | 118,133 | 112.4% |
| 4 Single Family - Income Eligible Services | 3,120 | 2,427 | 77.8% | 36,909 | 21,505 | 58.3% |
| 5 Income Eligible Multifamily | 1,554 | 1,835 | 118.1% | 22,545 | 24,838 | 110.2% |
| 6 Residential New Construction | 979 | 876 | 89.4% | 18,088 | 16,495 | 91.2% |
| 7 ENERGY STAR® HVAC | 3,181 | 5,220 | 164.1% | 51,309 | 87,424 | 170.4% |
| 8 EnergyWise | 2,841 | 4,425 | 155.7% | 14,385 | 19,711 | 137.0% |
| 9 EnergyWise Multifamily | 1,240 | 1,494 | 120.5% | 16,307 | 10,271 | 63.0% |
| 10 Home Energy Reports | 26,852 | 31,512 | 117.4% | 26,852 | 31,512 | 117.4% |
| 11 ENERGY STAR® Lighting | 11,533 | 12,628 | 109.5% | 26,801 | 26,542 | 99.0% |
| 12 Residential Consumer Products | 5,926 | 5,515 | 93.1% | 38,130 | 35,916 | 94.2% |
| 13 C&I | 81,029 | 65,433 | 80.8% | 1,039,136 | 772,578 | 74.3% |
| 14 Income Eligible | 4,674 | 4,262 | 91.2% | 59,454 | 46,342 | 77.9% |
| 15 Residential | 52,553 | 61,670 | 117.3% | 191,872 | 227,870 | 118.8% |
| 16 Total | 138,256 | 131,365 | 95.0% | 1,290,462 | 1,046,790 | 81.1% |

CORRECTED

Comparison of 2021 Planned and Actual Electric Benefits, Expenses, and Performance Incentives

| | (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) | (i) |
|--|-----------------------|----------------------|--------------------------|---|--|---------------------------|-------------------------------|------------------------------|----------------------------|
| Program Name | Planned Total Benefit | Actual Total Benefit | Actual / Planned Benefit | Planned Program Implementation Expenses | Actual Program Implementation Expenses | Actual / Planned Expenses | Planned Performance Incentive | Actual Performance Incentive | Actual / Planned Incentive |
| 1 Residential New Construction | \$6,539.1 | \$5,795.9 | 88.6% | \$1,611.3 | \$1,137.8 | 70.6% | | | |
| 2 ENERGY STAR® HVAC | \$13,306.5 | \$27,203.7 | 204.4% | \$3,487.8 | \$4,334.7 | 124.3% | | | |
| 3 EnergyWise | \$31,315.6 | \$52,288.6 | 167.0% | \$15,692.2 | \$22,381.3 | 142.6% | | | |
| 4 EnergyWise Multifamily | \$7,847.9 | \$7,102.6 | 90.5% | \$2,804.3 | \$1,335.5 | 47.6% | | | |
| 5 Home Energy Reports | \$8,530.8 | \$9,547.3 | 111.9% | \$2,641.7 | \$2,374.9 | 89.9% | | | |
| 6 ENERGY STAR® Lighting | \$14,018.2 | \$12,529.2 | 89.4% | \$5,274.8 | \$3,938.7 | 74.7% | | | |
| 7 Residential Consumer Products | \$11,372.7 | \$11,205.9 | 98.5% | \$2,681.2 | \$2,535.1 | 94.5% | | | |
| 8 Residential ConnectedSolutions | \$11,301.0 | \$5,892.6 | 52.1% | \$1,920.5 | \$611.5 | 31.8% | | | |
| 9 Energy Efficiency Education Programs | | | | \$40.0 | \$40.0 | 100.1% | | | |
| 10 Residential Pilots | | | | \$0.0 | \$0.0 | | | | |
| 11 Community Based Initiatives - Residential | | | | \$226.2 | \$114.8 | 50.7% | | | |
| 12 Comprehensive Marketing - Residential | | | | \$332.7 | \$264.1 | 79.4% | | | |
| 13 Residential Workforce Development | | | | \$0.0 | | | | | |
| 14 Non-Income Eligible Residential | \$104,231.8 | \$131,565.8 | 126.2% | \$36,712.7 | \$39,068.3 | 106.4% | \$1,925.0 | \$625.0 | 32.5% |
| 15 Single Family - Income Eligible Services | \$34,193.5 | \$19,605.5 | 57.3% | \$12,846.1 | \$8,393.9 | 65.3% | | | |
| 16 Income Eligible Multifamily | \$6,861.6 | \$5,011.5 | 73.0% | \$3,549.0 | \$3,447.4 | 97.1% | | | |
| 17 Income Eligible Workforce Development | | | | \$0.0 | | | | | |
| 18 Income Eligible Residential | \$41,055.1 | \$24,616.9 | 60.0% | \$16,395.1 | \$11,841.3 | 72.2% | \$1,100.0 | \$0.0 | 0.0% |
| 19 Large Commercial New Construction | \$57,678.8 | \$56,013.7 | 97.1% | \$8,188.2 | \$8,293.7 | 101.3% | | | |
| 20 Large Commercial Retrofit | \$327,029.8 | \$203,066.8 | 62.1% | \$31,565.2 | \$23,407.6 | 74.2% | | | |
| 21 Small Business Direct Install | \$36,190.8 | \$33,082.8 | 91.4% | \$8,883.6 | \$7,483.2 | 84.2% | | | |
| 22 Commercial ConnectedSolutions | \$29,465.0 | \$29,076.6 | 98.7% | \$2,990.1 | \$3,086.3 | 103.2% | | | |
| 23 Commercial Pilots | | | | \$0.0 | | | | | |
| 25 Community Based Initiatives - C&I | | | | \$74.5 | \$0.0 | 0.0% | | | |
| 26 Finance Costs | | | | \$5,000.0 | \$0.0 | 0.0% | | | |
| 27 Commercial Workforce Development | | | | \$0.0 | | | | | |
| 28 Commercial & Industrial | \$450,364.4 | \$321,239.7 | 71.3% | \$56,701.6 | \$42,270.7 | 74.5% | \$2,475.0 | \$3,554.6 | 143.6% |
| 29 OER | | | | \$738.5 | \$738.5 | 100.0% | | | |
| 30 EERMC | | | | \$738.5 | \$645.1 | 87.4% | | | |
| 31 Regulatory | | | | \$1,477.0 | \$1,383.6 | 93.7% | | | |
| 32 TOTAL | \$595,651.3 | \$477,422.5 | 80.2% | \$111,286.3 | \$94,564.0 | 85.0% | \$5,500.0 | \$4,179.6 | 76.0% |

Comparison of 2022 Planned and Actual Electric Savings

| | (a) | (b) | (c) | (d) | (e) | (f) |
|--|----------------------------|---------------------------|--------------------|------------------------------|-----------------------------|----------------------|
| Planned Program Name | Planned Annual MWh Savings | Actual Annual MWh Savings | Annual Achievement | Planned Lifetime MWh Savings | Actual Lifetime MWh Savings | Lifetime Achievement |
| 1 Large Commercial New Construction | 12,589 | 7,065 | 56.1% | 192,343 | 101,622 | 52.8% |
| 2 Large Commercial Retrofit | 41,132 | 43,442 | 105.6% | 312,931 | 322,519 | 103.1% |
| 3 Small Business Direct Install | 9,976 | 7,042 | 70.6% | 64,394 | 57,769 | 89.7% |
| 4 Single Family - Income Eligible Services | 3,314 | 2,388 | 72.1% | 38,506 | 27,991 | 72.7% |
| 5 Income Eligible Multifamily | 1,538 | 1,419 | 92.3% | 24,309 | 17,288 | 71.1% |
| 6 Residential New Construction | 867 | 448 | 51.7% | 14,947 | 6,859 | 45.9% |
| 7 ENERGY STAR® HVAC | 4,620 | 6,583 | 142.5% | 77,717 | 114,444 | 147.3% |
| 8 EnergyWise | 2,789 | 2,652 | 95.1% | 13,472 | 12,683 | 94.1% |
| 9 EnergyWise Multifamily | 1,424 | 721 | 50.7% | 20,783 | 3,442 | 16.6% |
| 10 Home Energy Reports | 26,852 | 30,814 | 114.8% | 26,852 | 30,814 | 114.8% |
| 11 Residential Consumer Products | 6,885 | 2,461 | 35.7% | 47,554 | 17,559 | 36.9% |
| 12 C&I | 63,696 | 57,550 | 90.3% | 569,668 | 481,911 | 84.6% |
| 13 Income Eligible | 4,851 | 3,807 | 78.5% | 62,816 | 45,279 | 72.1% |
| 14 Residential | 43,435 | 43,679 | 100.6% | 201,325 | 185,799 | 92.3% |
| 15 Total | 111,983 | 105,036 | 93.8% | 833,808 | 712,989 | 85.5% |

CORRECTED

Comparison of 2022 Planned and Actual Electric Benefits, Expenses, and Performance Incentives

| | (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) | (i) |
|--|-----------------------|----------------------|--------------------------|---|--|---------------------------|-------------------------------|------------------------------|----------------------------|
| Program Name | Planned Total Benefit | Actual Total Benefit | Actual / Planned Benefit | Planned Program Implementation Expenses | Actual Program Implementation Expenses | Actual / Planned Expenses | Planned Performance Incentive | Actual Performance Incentive | Actual / Planned Incentive |
| 1 Residential New Construction | \$4,232.1 | \$2,025.2 | 47.9% | \$1,617.0 | \$1,102.0 | 68.2% | | | |
| 2 ENERGY STAR® HVAC | \$14,630.8 | \$30,377.4 | 207.6% | \$4,684.4 | \$4,326.1 | 92.4% | | | |
| 3 EnergyWise | \$16,626.6 | \$17,113.1 | 102.9% | \$15,557.0 | \$14,357.5 | 92.3% | | | |
| 4 EnergyWise Multifamily | \$6,189.9 | \$1,783.9 | 28.8% | \$3,238.3 | \$1,242.1 | 38.4% | | | |
| 5 Home Energy Reports | \$5,401.4 | \$6,198.3 | 114.8% | \$2,639.1 | \$2,389.7 | 90.5% | | | |
| 6 Residential Consumer Products | \$9,713.3 | \$3,808.7 | 39.2% | \$2,796.0 | \$1,890.9 | 67.6% | | | |
| 7 Residential ConnectedSolutions | \$2,886.0 | \$2,279.2 | 79.0% | \$1,822.6 | \$1,490.0 | 81.8% | | | |
| 8 Energy Efficiency Education Programs | | | | \$0.0 | \$0.0 | | | | |
| 9 Residential Pilots | | | | \$0.0 | \$0.0 | | | | |
| 10 Community Based Initiatives - Residential | | | | \$255.1 | \$0.0 | 0.0% | | | |
| 11 Comprehensive Marketing - Residential | | | | \$247.9 | \$234.2 | 94.5% | | | |
| 13 Non-Income Eligible Residential | \$59,680.0 | \$63,585.8 | 106.5% | \$32,857.4 | \$27,032.6 | 82.3% | \$0.0 | \$625.0 | |
| 14 Single Family - Income Eligible Services | \$25,758.0 | \$17,105.9 | 66.4% | \$13,275.3 | \$10,208.0 | 76.9% | | | |
| 15 Income Eligible Multifamily | \$8,368.1 | \$3,072.8 | 36.7% | \$3,538.9 | \$2,572.1 | 72.7% | | | |
| 17 Income Eligible Residential | \$34,126.2 | \$20,178.7 | 59.1% | \$16,814.3 | \$12,780.0 | 76.0% | \$0.0 | -\$443.3 | |
| 18 Large Commercial New Construction | \$34,249.9 | \$18,231.3 | 53.2% | \$9,034.1 | \$4,315.4 | 47.8% | | | |
| 19 Large Commercial Retrofit | \$72,910.7 | \$71,738.2 | 98.4% | \$25,010.5 | \$18,559.0 | 74.2% | | | |
| 20 Small Business Direct Install | \$12,596.2 | \$10,007.0 | 79.4% | \$8,883.3 | \$5,727.7 | 64.5% | | | |
| 21 Commercial ConnectedSolutions | \$10,621.2 | \$7,155.5 | 67.4% | \$4,393.6 | \$4,704.9 | 107.1% | | | |
| 22 Commercial Pilots | | | | \$0.0 | \$0.0 | | | | |
| 24 Community Based Initiatives - C&I | | | | \$85.0 | \$8.8 | 10.3% | | | |
| 25 Finance Costs | | | | \$2,000.0 | \$2,000.0 | 100.0% | | | |
| 26 Commercial Workforce Development | | | | \$157.5 | | 0.0% | | | |
| 27 Commercial & Industrial | \$130,378.0 | \$107,132.0 | 82.2% | \$49,564.1 | \$35,315.8 | 71.3% | \$3,390.2 | \$2,866.6 | 84.6% |
| 28 OER | | | | \$1,541.7 | \$1,541.7 | 100.0% | | | |
| 29 EERMC | | | | \$766.2 | \$406.8 | 53.1% | | | |
| 30 Rhode Island Infrastructure Bank | | | | \$3,737.5 | \$3,735.0 | 99.9% | | | |
| 31 Regulatory | | | | \$6,045.4 | \$5,683.5 | 94.0% | | | |
| 32 TOTAL | \$224,184.2 | \$190,896.5 | 85.2% | \$105,281.1 | \$80,811.9 | 76.8% | \$3,390.2 | \$3,048.3 | 89.9% |

Comparison of 2023 Planned and Actual Electric Savings

| | (a) | (b) | (c) | (d) | (e) | (f) |
|--|----------------------------|---------------------------|--------------------|------------------------------|-----------------------------|----------------------|
| Planned Program Name | Planned Annual MWh Savings | Actual Annual MWh Savings | Annual Achievement | Planned Lifetime MWh Savings | Actual Lifetime MWh Savings | Lifetime Achievement |
| 1 Large Commercial New Construction | 10,481 | 8,563 | 81.7% | 157,598 | 126,976 | 80.6% |
| 2 Large Commercial Retrofit | 35,260 | 38,245 | 108.5% | 244,962 | 259,740 | 106.0% |
| 3 Small Business Direct Install | 9,260 | 6,486 | 70.0% | 57,778 | 47,842 | 82.8% |
| 4 Single Family - Income Eligible Services | 2,801 | 2,628 | 93.8% | 28,796 | 34,471 | 119.7% |
| 5 Income Eligible Multifamily | 1,298 | 437 | 33.7% | 17,632 | 6,629 | 37.6% |
| 6 Residential New Construction | 689 | 567 | 82.2% | 13,144 | 10,324 | 78.5% |
| 7 ENERGY STAR® HVAC | 4,175 | 5,702 | 136.6% | 71,055 | 98,697 | 138.9% |
| 8 EnergyWise | 3,147 | 2,386 | 75.8% | 16,940 | 15,596 | 92.1% |
| 9 EnergyWise Multifamily | 680 | 323 | 47.6% | 9,493 | 3,466 | 36.5% |
| 10 Home Energy Reports | 24,350 | 25,932 | 106.5% | 24,350 | 25,932 | 106.5% |
| 11 Residential Consumer Products | 4,473 | 2,131 | 47.6% | 31,684 | 15,024 | 47.4% |
| 12 C&I | 55,001 | 53,294 | 96.9% | 460,338 | 434,558 | 94.4% |
| 13 Income Eligible | 4,099 | 3,065 | 74.8% | 46,427 | 41,100 | 88.5% |
| 14 Residential | 37,513 | 37,041 | 98.7% | 166,665 | 169,039 | 101.4% |
| 15 Total | 96,613 | 93,400 | 96.7% | 673,430 | 644,697 | 95.7% |

CORRECTED

Comparison of 2023 Planned and Actual Electric Benefits, Expenses, and Performance Incentives

| | (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) | (i) |
|---|-----------------------|----------------------|--------------------------|---|--|---------------------------|-------------------------------|------------------------------|----------------------------|
| Program Name | Planned Total Benefit | Actual Total Benefit | Actual / Planned Benefit | Planned Program Implementation Expenses | Actual Program Implementation Expenses | Actual / Planned Expenses | Planned Performance Incentive | Actual Performance Incentive | Actual / Planned Incentive |
| 1 Residential New Construction | \$4,003.5 | \$3,066.9 | 76.6% | \$1,592.0 | \$1,005.5 | 63.2% | | | |
| 2 ENERGY STAR® HVAC | \$21,708.5 | \$16,911.7 | 77.9% | \$5,340.8 | \$5,339.5 | 100.0% | | | |
| 3 EnergyWise | \$20,158.4 | \$18,085.9 | 89.7% | \$15,585.3 | \$15,666.8 | 100.5% | | | |
| 4 EnergyWise Multifamily | \$3,295.9 | \$979.6 | 29.7% | \$1,341.2 | \$845.7 | 63.1% | | | |
| 5 Home Energy Reports | \$5,862.7 | \$6,185.2 | 105.5% | \$2,145.8 | \$2,285.6 | 106.5% | | | |
| 6 Residential Consumer Products | \$7,261.1 | \$3,576.2 | 49.3% | \$2,489.1 | \$1,811.2 | 72.8% | | | |
| 7 Residential ConnectedSolutions | \$3,148.1 | \$2,699.4 | 85.7% | \$1,963.1 | \$3,381.9 | 172.3% | | | |
| 9 Residential Pilots | | | | \$0.0 | \$0.0 | | | | |
| 10 Community Based Initiatives - Residential | | | | \$280.6 | \$0.0 | 0.0% | | | |
| 11 Comprehensive Marketing - Residential | | | | \$310.5 | \$337.4 | 108.7% | | | |
| 12 Residential Workforce Development | | | | \$0.0 | \$0.0 | | | | |
| 13 Non-Income Eligible Residential | \$65,438.1 | \$51,504.9 | 78.7% | \$31,048.3 | \$30,673.6 | 98.8% | \$658.3 | \$176.3 | 26.8% |
| 14 Single Family - Income Eligible Services | \$21,877.2 | \$19,475.9 | 89.0% | \$13,141.5 | \$13,124.8 | 99.9% | | | |
| 15 Income Eligible Multifamily | \$4,236.2 | \$1,339.0 | 31.6% | \$3,335.8 | \$1,713.5 | 51.4% | | | |
| 17 Income Eligible Residential | \$26,113.4 | \$20,814.9 | 79.7% | \$16,477.3 | \$14,838.3 | 90.1% | \$0.0 | -\$42.0 | |
| 18 Large Commercial New Construction | \$31,314.7 | \$23,526.6 | 75.1% | \$8,269.2 | \$6,974.7 | 84.3% | | | |
| 19 Large Commercial Retrofit | \$63,222.6 | \$64,060.9 | 101.3% | \$22,176.2 | \$26,793.5 | 120.8% | | | |
| 20 Small Business Direct Install | \$9,309.2 | \$9,790.1 | 105.2% | \$7,552.2 | \$5,402.6 | 71.5% | | | |
| 21 Commercial ConnectedSolutions | \$12,784.5 | \$10,188.2 | 79.7% | \$5,666.8 | \$5,626.3 | 99.3% | | | |
| 22 Commercial Pilots | | | | \$0.0 | \$0.0 | | | | |
| 24 Community Based Initiatives - C&I | | | | \$93.5 | \$14.0 | 15.0% | | | |
| 25 Finance Costs | | | | \$2,000.0 | \$2,000.0 | 100.0% | | | |
| 26 Commercial Workforce Development | | | | \$157.5 | \$9.3 | 5.9% | | | |
| 27 Commercial & Industrial | \$116,631.0 | \$107,565.8 | 92.2% | \$45,915.5 | \$46,820.5 | 102.0% | \$2,700.8 | \$2,277.4 | 84.3% |
| 28 OER | | | | \$891.4 | \$891.4 | 100.0% | | | |
| 29 EERMC | | | | \$594.3 | \$574.5 | 96.7% | | | |
| 30 Electric Resistance to Heat Pump Conversions | | | | \$409.3 | \$409.3 | 100.0% | | | |
| 31 Rhode Island Infrastructure Bank | | | | \$3,737.5 | \$3,737.5 | 100.0% | | | |
| 32 Regulatory | | | | \$5,632.4 | \$5,612.6 | 99.6% | \$0.0 | \$0.0 | |
| 33 TOTAL | \$208,182.6 | \$179,885.6 | 86.4% | \$99,073.5 | \$97,945.0 | 98.9% | \$3,359.2 | \$2,411.8 | 71.8% |

Comparison of 2021 Planned and Actual Gas Savings

| | (a) | (b) | (c) | (d) | (e) | (f) |
|--|------------------------------|-----------------------------|--------------------|--------------------------------|-------------------------------|----------------------|
| Planned Program Name | Planned Annual MMBtu Savings | Actual Annual MMBtu Savings | Annual Achievement | Planned Lifetime MMBtu Savings | Actual Lifetime MMBtu Savings | Lifetime Achievement |
| 1 Large Commercial New Construction | 27,631 | 50,025 | 181.0% | 437,398 | 692,613 | 158.3% |
| 2 Large Commercial Retrofit | 187,283 | 76,159 | 40.7% | 1,455,776 | 717,900 | 49.3% |
| 3 Small Business Direct Install | 4,886 | 5,949 | 121.7% | 48,861 | 64,537 | 132.1% |
| 4 Commercial & Industrial Multifamily | 9,444 | 3,836 | 40.6% | 141,869 | 57,807 | 40.7% |
| 5 Single Family - Income Eligible Services | 10,055 | 6,635 | 66.0% | 201,104 | 132,704 | 66.0% |
| 6 Income Eligible Multifamily | 14,399 | 11,810 | 82.0% | 315,545 | 198,615 | 62.9% |
| 7 EnergyWise | 20,869 | 34,139 | 163.6% | 476,550 | 786,836 | 165.1% |
| 8 Energy Star® HVAC | 38,345 | 29,363 | 76.6% | 667,485 | 514,514 | 77.1% |
| 9 EnergyWise Multifamily | 8,633 | 7,567 | 87.7% | 148,675 | 152,194 | 102.4% |
| 10 Home Energy Reports | 93,548 | 88,173 | 94.3% | 93,548 | 88,173 | 94.3% |
| 11 Residential New Construction | 4,445 | 2,769 | 62.3% | 85,272 | 48,111 | 56.4% |
| C&I | 229,243 | 135,968 | 59.3% | 2,083,905 | 1,532,857 | 73.6% |
| Income Eligible | 24,454 | 18,445 | 75.4% | 516,649 | 331,319 | 64.1% |
| Residential | 165,840 | 162,011 | 97.7% | 1,471,530 | 1,589,829 | 108.0% |
| Total | 419,537 | 316,424 | 75.4% | 4,072,084 | 3,454,006 | 84.8% |

CORRECTED

Comparison of 2021 Planned and Actual Gas Benefits, Expenses, and Performance Incentives

| | (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) | (i) |
|---|-----------------------|----------------------|--------------------------|---|--|---------------------------|-------------------------------|------------------------------|----------------------------|
| Program Name | Planned Total Benefit | Actual Total Benefit | Actual / Planned Benefit | Planned Program Implementation Expenses | Actual Program Implementation Expenses | Actual / Planned Expenses | Planned Performance Incentive | Actual Performance Incentive | Actual / Planned Incentive |
| 1 Energy Star® HVAC | \$13,615.7 | \$10,421.1 | 76.5% | \$3,673.0 | \$2,635.3 | 71.7% | | | |
| 2 EnergyWise | \$18,350.6 | \$34,335.0 | 187.1% | \$8,117.6 | \$16,227.2 | 199.9% | | | |
| 3 EnergyWise MultiFamily | \$8,630.2 | \$7,715.1 | 89.4% | \$1,491.6 | \$1,608.2 | 107.8% | | | |
| 4 Home Energy Reports | \$1,825.1 | \$1,624.6 | 89.0% | \$450.9 | \$400.3 | 88.8% | | | |
| 5 Residential New Construction | \$1,378.3 | \$829.8 | 60.2% | \$674.8 | \$397.6 | 58.9% | | | |
| 6 Comprehensive Marketing - Residential | | | | \$64.8 | \$73.7 | 113.8% | | | |
| 7 Community Based Initiatives - Residential | | | | \$75.8 | \$38.2 | 50.3% | | | |
| 9 Residential Workforce Development | | | | \$0.0 | | | | | |
| 10 Non-Income Eligible Residential | \$43,799.9 | \$54,925.5 | 125.4% | \$14,548.5 | \$21,380.5 | 147.0% | \$0.0 | \$0.0 | |
| 11 Single Family - Income Eligible Services | \$17,598.3 | \$11,757.0 | 66.8% | \$5,952.3 | \$3,956.4 | 66.5% | | | |
| 12 Income Eligible Multifamily | \$12,749.9 | \$9,936.3 | 77.9% | \$3,009.4 | \$2,764.6 | 91.9% | | | |
| 13 Income Eligible Workforce Development | | | | \$0.0 | | | | | |
| 14 Income Eligible Residential | \$30,348.1 | \$21,693.3 | 71.5% | \$8,961.8 | \$6,721.0 | 75.0% | \$0.0 | \$0.0 | |
| 15 Large Commercial New Construction | \$12,422.2 | \$21,921.0 | 176.5% | \$2,634.2 | \$2,569.7 | 97.6% | | | |
| 16 Large Commercial Retrofit | \$44,777.8 | \$17,587.3 | 39.3% | \$5,054.1 | \$3,278.1 | 64.9% | | | |
| 17 Small Business Direct Install | \$1,539.9 | \$1,779.1 | 115.5% | \$332.7 | \$158.7 | 47.7% | | | |
| 18 Commercial & Industrial Multifamily | \$4,922.8 | \$2,418.3 | 49.1% | \$953.2 | \$951.4 | 99.8% | | | |
| 19 Commercial Pilots | | | | \$215.8 | \$105.5 | 48.9% | | | |
| 20 Community Based Initiatives - C&I | | | | \$24.8 | \$0.0 | 0.0% | | | |
| 21 Finance Costs | | | | \$0.0 | \$0.0 | | | | |
| 22 Commercial Workforce Development | | | | \$0.0 | | | | | |
| 23 Large Commercial & Industrial | \$63,662.7 | \$43,705.7 | 68.7% | \$9,214.8 | \$7,063.4 | 76.7% | \$0.0 | \$996.1 | |
| 24 EERMC | | | | \$275.1 | \$240.3 | 87.4% | | | |
| 25 OER | | | | \$275.1 | \$275.1 | 100.0% | | | |
| 26 Regulatory | | | | \$550.1 | \$515.3 | 93.7% | | | |
| 27 Grand Total | \$137,810.7 | \$120,324.5 | 87.3% | \$33,275.2 | \$35,680.2 | 107.2% | \$1,700.0 | \$996.1 | 58.6% |

Comparison of 2022 Planned and Actual Gas Savings

| | (a) | (b) | (c) | (d) | (e) | (f) |
|--|------------------------------|-----------------------------|--------------------|--------------------------------|-------------------------------|----------------------|
| Planned Program Name | Planned Annual MMBtu Savings | Actual Annual MMBtu Savings | Annual Achievement | Planned Lifetime MMBtu Savings | Actual Lifetime MMBtu Savings | Lifetime Achievement |
| 1 Large Commercial New Construction | 52,956 | 44,398 | 83.8% | 788,763 | 581,376 | 73.7% |
| 2 Large Commercial Retrofit | 142,888 | 146,383 | 102.4% | 1,332,508 | 1,374,881 | 103.2% |
| 3 Small Business Direct Install | 6,113 | 4,311 | 70.5% | 91,700 | 78,956 | 86.1% |
| 4 Commercial & Industrial Multifamily | 8,803 | 2,771 | 31.5% | 131,220 | 59,175 | 45.1% |
| 5 Single Family - Income Eligible Services | 10,942 | 6,481 | 59.2% | 218,847 | 129,628 | 59.2% |
| 6 Income Eligible Multifamily | 14,700 | 9,525 | 64.8% | 273,085 | 235,706 | 86.3% |
| 7 Energy Star® HVAC | 26,740 | 24,189 | 90.5% | 439,717 | 391,435 | 89.0% |
| 8 EnergyWise | 20,850 | 22,391 | 107.4% | 478,550 | 526,451 | 110.0% |
| 9 EnergyWise Multifamily | 8,279 | 2,373 | 28.7% | 147,064 | 52,679 | 35.8% |
| 10 Home Energy Reports | 93,548 | 115,975 | 124.0% | 93,548 | 115,975 | 124.0% |
| 11 Residential New Construction | 3,610 | 4,764 | 132.0% | 64,899 | 96,022 | 148.0% |
| 12 C&I | 210,760 | 197,863 | 93.9% | 2,344,192 | 2,094,388 | 89.3% |
| 13 Income Eligible | 25,642 | 16,006 | 62.4% | 491,932 | 365,334 | 74.3% |
| 14 Residential | 153,027 | 169,692 | 110.9% | 1,223,778 | 1,182,562 | 96.6% |
| 15 Total | 389,430 | 383,562 | 98.5% | 4,059,902 | 3,642,284 | 89.7% |

CORRECTED

Comparison of 2022 Planned and Actual Gas Benefits, Expenses, and Performance Incentives

| | (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) | (i) |
|---|-----------------------|----------------------|--------------------------|---|--|---------------------------|-------------------------------|------------------------------|----------------------------|
| Program Name | Planned Total Benefit | Actual Total Benefit | Actual / Planned Benefit | Planned Program Implementation Expenses | Actual Program Implementation Expenses | Actual / Planned Expenses | Planned Performance Incentive | Actual Performance Incentive | Actual / Planned Incentive |
| 1 Energy Star® HVAC | \$7,646.0 | \$6,536.6 | 85.5% | \$3,732.5 | \$2,453.2 | 65.7% | | | |
| 2 EnergyWise | \$10,489.0 | \$19,176.3 | 182.8% | \$8,645.9 | \$9,083.4 | 105.1% | | | |
| 3 EnergyWise MultiFamily | \$6,317.2 | \$2,285.9 | 36.2% | \$1,489.2 | \$547.6 | 36.8% | | | |
| 4 Home Energy Reports | \$1,712.1 | \$2,114.3 | 123.5% | \$441.8 | \$379.4 | 85.9% | | | |
| 5 Residential New Construction | \$1,550.7 | \$3,148.0 | 203.0% | \$513.2 | \$591.8 | 115.3% | | | |
| 6 Comprehensive Marketing - Residential | | | | \$68.0 | \$0.0 | 0.0% | | | |
| 7 Community Based Initiatives - Residential | | | | \$85.0 | \$73.0 | 85.9% | | | |
| 10 Non-Income Eligible Residential | \$27,715.0 | \$33,261.1 | 120.0% | \$14,975.5 | \$13,128.4 | 87.7% | \$0.0 | -\$49.1 | |
| 11 Single Family - Income Eligible Services | \$12,986.8 | \$7,679.7 | 59.1% | \$6,371.8 | \$4,497.5 | 70.6% | | | |
| 12 Income Eligible Multifamily | \$17,620.5 | \$5,471.6 | 31.1% | \$2,948.9 | \$3,085.7 | 104.6% | | | |
| 13 Income Eligible Residential | \$30,607.3 | \$13,151.3 | 43.0% | \$9,320.7 | \$7,583.3 | 81.4% | \$0.0 | -\$171.3 | |
| 14 Large Commercial New Construction | \$18,944.5 | \$22,571.8 | 119.1% | \$3,186.6 | \$2,677.1 | 84.0% | | | |
| 15 Large Commercial Retrofit | \$38,996.5 | \$39,284.2 | 100.7% | \$4,696.3 | \$4,919.4 | 104.8% | | | |
| 16 Small Business Direct Install | \$1,686.1 | \$1,140.9 | 67.7% | \$355.9 | \$418.9 | 117.7% | | | |
| 17 Commercial & Industrial Multifamily | \$6,099.2 | \$864.7 | 14.2% | \$957.3 | \$490.8 | 51.3% | | | |
| 18 Commercial Pilots | | | | \$215.8 | \$67.2 | 31.1% | | | |
| 19 Community Based Initiatives - C&I | | | | \$28.3 | \$2.9 | 10.1% | | | |
| 20 Finance Costs | | | | \$0.0 | \$0.0 | | | | |
| 21 Commercial Workforce Development | | | | \$67.5 | | 0.0% | | | |
| 22 Large Commercial & Industrial | \$65,726.4 | \$63,861.5 | 97.2% | \$9,507.6 | \$8,576.2 | 90.2% | \$1,000.0 | \$717.4 | 71.7% |
| 23 EERMC | | | | \$259.5 | \$124.0 | 47.8% | | | |
| 24 OER | | | | \$755.6 | \$755.6 | 100.0% | | | |
| 25 Rhode Island Infrastructure Bank | | | | \$1,262.5 | \$1,265.0 | 100.2% | | | |
| 26 Regulatory | | | | \$2,277.6 | \$2,144.6 | 94.2% | | | |
| 27 Grand Total | \$124,048.7 | \$110,273.9 | 88.9% | \$36,081.5 | \$31,432.5 | 87.1% | \$1,000.0 | \$497.0 | 49.7% |

Comparison of 2023 Planned and Actual Gas Savings

| | (a) | (b) | (c) | (d) | (e) | (f) |
|--|------------------------------|-----------------------------|--------------------|--------------------------------|-------------------------------|----------------------|
| Planned Program Name | Planned Annual MMBtu Savings | Actual Annual MMBtu Savings | Annual Achievement | Planned Lifetime MMBtu Savings | Actual Lifetime MMBtu Savings | Lifetime Achievement |
| 1 Large Commercial New Construction | 48,823 | 52,727 | 108.0% | 716,705 | 689,301 | 96.2% |
| 2 Large Commercial Retrofit | 94,766 | 64,208 | 67.8% | 1,016,519 | 691,972 | 68.1% |
| 3 Small Business Direct Install | 9,723 | 8,271 | 85.1% | 130,193 | 82,957 | 63.7% |
| 4 Commercial & Industrial Multifamily | 4,249 | 2,871 | 67.6% | 64,645 | 68,959 | 106.7% |
| 5 Single Family - Income Eligible Services | 8,230 | 6,298 | 76.5% | 169,180 | 127,822 | 75.6% |
| 6 Income Eligible Multifamily | 11,075 | 8,031 | 72.5% | 172,464 | 194,929 | 113.0% |
| 7 Energy Star® HVAC | 27,030 | 20,995 | 77.7% | 517,571 | 433,147 | 83.7% |
| 8 EnergyWise | 20,697 | 23,167 | 111.9% | 490,013 | 524,666 | 107.1% |
| 9 EnergyWise Multifamily | 5,358 | 1,254 | 23.4% | 110,428 | 27,725 | 25.1% |
| 10 Home Energy Reports | 91,640 | 106,308 | 116.0% | 91,640 | 106,308 | 116.0% |
| 11 Residential New Construction | 3,287 | 3,243 | 98.7% | 58,476 | 57,303 | 98.0% |
| 12 C&I | 157,561 | 128,077 | 81.3% | 1,928,063 | 1,533,189 | 79.5% |
| 13 Income Eligible | 19,305 | 14,328 | 74.2% | 341,644 | 322,751 | 94.5% |
| 14 Residential | 148,013 | 154,966 | 104.7% | 1,268,128 | 1,149,149 | 90.6% |
| 15 Total | 324,879 | 297,371 | 91.5% | 3,537,835 | 3,005,089 | 84.9% |

CORRECTED

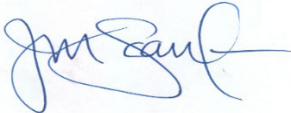
Comparison of 2023 Planned and Actual Gas Benefits, Expenses, and Performance Incentives

| | (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) | (i) |
|---|-----------------------|----------------------|--------------------------|---|--|---------------------------|-------------------------------|------------------------------|----------------------------|
| Program Name | Planned Total Benefit | Actual Total Benefit | Actual / Planned Benefit | Planned Program Implementation Expenses | Actual Program Implementation Expenses | Actual / Planned Expenses | Planned Performance Incentive | Actual Performance Incentive | Actual / Planned Incentive |
| 1 Energy Star® HVAC | \$10,389.4 | \$6,869.5 | 66.1% | \$3,586.9 | \$2,881.2 | 80.3% | | | |
| 2 EnergyWise | \$10,970.1 | \$11,555.2 | 105.3% | \$9,873.1 | \$7,822.9 | 79.2% | | | |
| 3 EnergyWise MultiFamily | \$5,172.4 | \$1,783.9 | 34.5% | \$1,485.4 | \$439.6 | 29.6% | | | |
| 4 Home Energy Reports | \$1,701.9 | \$1,974.3 | 116.0% | \$360.5 | \$378.5 | 105.0% | | | |
| 5 Residential New Construction | \$1,400.9 | \$1,607.9 | 114.8% | \$621.5 | \$737.7 | 118.7% | | | |
| 6 Comprehensive Marketing - Residential | | | | \$69.1 | \$71.6 | 103.6% | | | |
| 7 Community Based Initiatives - Residential | | | | \$93.5 | \$0.0 | 0.0% | | | |
| 8 Residential Pilots | | | | \$0.0 | \$0.0 | | | | |
| 9 Residential Workforce Development | | | | \$0.0 | \$0.0 | | | | |
| 10 Non-Income Eligible Residential | \$29,634.7 | \$23,790.8 | 80.3% | \$16,090.0 | \$12,331.5 | 76.6% | \$0.0 | -\$173.2 | |
| 11 Single Family - Income Eligible Services | \$10,138.9 | \$8,036.1 | 79.3% | \$5,429.0 | \$4,439.4 | 81.8% | | | |
| 12 Income Eligible Multifamily | \$9,807.3 | \$4,693.8 | 47.9% | \$3,215.4 | \$2,916.3 | 90.7% | | | |
| 13 Income Eligible Residential | \$19,946.2 | \$12,729.9 | 63.8% | \$8,644.4 | \$7,355.8 | 85.1% | \$0.0 | -\$43.7 | |
| 14 Large Commercial New Construction | \$17,538.9 | \$29,060.5 | 165.7% | \$2,818.7 | \$3,912.5 | 138.8% | | | |
| 15 Large Commercial Retrofit | \$16,873.4 | \$11,132.9 | 66.0% | \$4,639.6 | \$2,658.4 | 57.3% | | | |
| 16 Small Business Direct Install | \$2,372.2 | \$2,248.7 | 94.8% | \$689.8 | \$308.3 | 44.7% | | | |
| 17 Commercial & Industrial Multifamily | \$5,917.1 | \$1,015.2 | 17.2% | \$891.2 | \$682.0 | 76.5% | | | |
| 18 Commercial Pilots | | | | \$12.4 | \$64.1 | 516.4% | | | |
| 19 Community Based Initiatives - C&I | | | | \$31.2 | \$7.8 | 25.1% | | | |
| 20 Finance Costs | | | | \$0.0 | \$0.0 | | | | |
| 21 Commercial Workforce Development | | | | \$67.5 | \$3.6 | 5.3% | | | |
| 22 Large Commercial & Industrial | \$42,701.7 | \$43,457.4 | 101.8% | \$9,150.4 | \$7,636.9 | 83.5% | \$792.0 | \$614.7 | 77.6% |
| 23 EERMC | | | | \$396.9 | \$383.7 | 96.7% | | | |
| 24 OER | | | | \$595.3 | \$595.3 | 100.0% | | | |
| 25 Rhode Island Infrastructure Bank | | | | \$1,262.5 | \$1,262.5 | 100.0% | | | |
| 26 Regulatory | | | | \$2,254.7 | \$2,241.5 | 99.4% | | | |
| 27 Grand Total | \$92,282.6 | \$79,978.1 | 86.7% | \$36,139.5 | \$29,565.6 | 81.8% | \$792.0 | \$397.8 | 50.2% |

Certificate of Service

I hereby certify that a copy of the cover letter and any materials accompanying this certificate was electronically transmitted to the individuals listed below.

The paper copies of this filing are being hand delivered to the Rhode Island Public Utilities Commission and to the Rhode Island Division of Public Utilities and Carriers.



Joanne M. Scanlon

August 22, 2024

Date

**Docket No. 22-33-EE – Rhode Island Energy’s Energy Efficiency Plan 2023
Service list updated 8/15/2024**

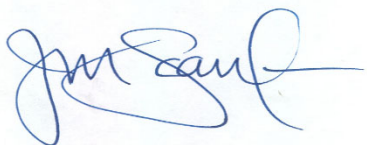
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Joanne M. Scanlon

August 22, 2024
Date

**Docket No. 23-35-EE – Rhode Island Energy’s EE Plan 2024-2026 Three-Year Plan and 2024 Annual EEP
Service list updated 5/1/2024**

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