

Andrew S. Marcaccio, Counsel
PPL Services Corporation
AMarcaccio@pplweb.com

280 Melrose Street
Providence, RI 02907
Phone 401-784-7263



February 10, 2023

VIA ELECTRONIC MAIL

Luly E. Massaro, Commission Clerk
Rhode Island Public Utilities Commission
89 Jefferson Boulevard
Warwick, RI 02888

**RE: Docket 5189 – Rhode Island Energy’s Electric and Gas Energy Efficiency Programs
2022 Quarterly Reports – Fourth Quarter**

Dear Ms. Massaro:

Enclosed please find an electronic copy of Rhode Island Energy’s¹ quarterly report for the fourth quarter of 2022 in the above-referenced docket.² These reports include the quarterly results for the Company’s natural gas and electric energy efficiency programs and a summary of each program’s progress. The Company has provided copies of this report to the parties in this docket.

Thank you for your attention to this matter. If you have any questions, please contact me at 401-784-7263.

Sincerely,

A handwritten signature in blue ink, appearing to read "Andrew S. Marcaccio".

Andrew S. Marcaccio

Enclosures

cc: Docket 5189 Service List
Jon Hagopian, Esq.
John Bell, Division

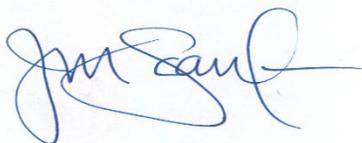
¹ The Narragansett Electric Company d/b/a National Grid (National Grid or the Company).

² Per a communication from Commission counsel on October 4, 2021, the Company is submitting an electronic version of this filing followed by six (6) hard copies filed with the Clerk within 24 hours of the electronic filing.

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

February 10, 2023

Date

Docket No. 5189 – Rhode Island Energy – 2022 Annual Energy Efficiency Program - Service list updated 11/21/2022

Name /Address	E-mail Distribution List	Phone
The Narragansett Electric Company d/b/a Rhode Island Energy Andrew Marcaccio, Esq. 280 Melrose St. Providence, RI 02907 Leticia C. Pimentel, Esq. Robinson & Cole LLP One Financial Plaza, 14th Floor Providence, RI 02903	AMarcaccio@pplweb.com;	401-784-4263
	COBrien@pplweb.com;	
	JHutchinson@pplweb.com;	
	JScanlon@pplweb.com;	
	TEAst@RIEnergy.com;	
	DMMoreira@rienergy.com;	
	BSFeldman@rienergy.com;	
	DJTukey@rienergy.com;	
	FOOyenuga@RIEnergy.com;	
	BJPelletier@rienergy.com;	
JKessler@rienergy.com;		
LPimentel@rc.com;		
National Grid Brooke Skulley, Esq. 40 Sylvan Road Waltham, MA 02451	Brooke.Skulley@nationalgrid.com;	
Division of Public Utilities and Carriers Margaret L. Hogan, Esq.	Margaret.L.Hogan@dpuc.ri.gov;	401-780-2120
	Jon.hagopian@dpuc.ri.gov;	
	john.bell@dpuc.ri.gov;	
	Joel.munoz@dpuc.ri.gov;	
	Michelle.Barbosa@dpuc.ri.gov;	
Machaela.Seaton@dpuc.ri.gov;		
Synapse Energy Economics	twoolf@synapse-energy.com;	

Tim Woolf Jennifer Kallay 22 Pearl Street Cambridge, MA 02139	jkallay@synapse-energy.com;	
RI EERMC Marisa Desautel, Esq. Office of Marisa Desautel, LLC 55 Pine St. Providence, RI 02903 Mike Guerard, Optimal Energy	marisa@desautelesq.com; mdewey@desautelesq.com; guerard@optenergy.com; ross@optenergy.com;	401-477-0023
Acadia Center Hank Webster, Director & Staff Atty.	HWebster@acadiacenter.org;	401-276-0600 x402
Office of Energy Resources (OER) Albert Vitali, Esq. Dept. of Administration Division of Legal Services One Capitol Hill, 4 th Floor Providence, RI 02908	Albert.Vitali@doa.ri.gov; Nancy.Russolino@doa.ri.gov; Christopher.Kearns@energy.ri.gov; Anika.Kreckel@energy.ri.gov; Nathan.Cleveland@energy.ri.gov;	401-222-8880
Original & 9 copies file w/: Luly E. Massaro, Commission Clerk John Harrington, Commission Counsel Public Utilities Commission 89 Jefferson Blvd. Warwick, RI 02888	Luly.massaro@puc.ri.gov; John.Harrington@puc.ri.gov; Alan.nault@puc.ri.gov; Todd.bianco@puc.ri.gov ; Emma.Rodvien@puc.ri.gov;	401-780-2107
Interested Party/Individual		
National Grid	Theresa.Burns@nationalgrid.com; Scott.McCabe@nationalgrid.com;	
Frederick Sneesby Dept. of Human Services	Frederick.sneesby@dhs.ri.gov;	
Chris Vitale, Esq., RI Infrastructure Bank	cvitale@hvlawltd.com; USatine@riib.org;	
Green Energy Consumers Alliance Larry Chretien, Executive Director Kai Salem	Larry@massenergy.org; kai@greenenergyconsumers.org; priscilla@greenenergyconsumers.org;	

Rhode Island Energy Efficiency

Fourth Quarter 2022 | Rhode Island Energy

February 9, 2023

Overview

Rhode Island Energy's energy efficiency programs continued to deliver energy savings for Rhode Island customers through the end of 2022 by achieving 722,345 net lifetime MWh of electric savings (86.6% of the net lifetime goal) and 3,584,052 net lifetime MMBtu of natural gas savings (88.3% of the net lifetime goal).

- **Residential New Construction:** There was a significant increase in the number of renovation units participating in the Residential New Construction program in Q4. 206 out of 263 units served were renovations, and total annual renovations in 2022 was 235, up from 25 in 2021 and 54 in 2020.
- **Income Eligible Services (IES):** The Lead Appliance Agency for Rhode Island has improved communication across the program with the assistance of the Local Appliance Vendor, and the local agencies. The agency processed over \$1,500,000 in Appliance invoices in Q4, an increase over Q3.
- **Small Business Direct Install:** Thanks to Rhode Island Energy's partnership with the Rhode Island Office of Energy Resources, over eighty small business received incentives up to 100% cost for air sealing, insulation, and ventilation in 2022. These measures will help reduce emissions and improve building comfort during cold winter and hot summer months.

2022 Program & Initiative Updates – Q4

Equity Working Group

Rhode Island Energy Efficiency Equity Working Group (EWG) Recommendations for 2022		
Actions	Metrics	Status
1. Develop multilingual marketing and outreach materials. Use accessible language to target audiences in each publication.		
1. All Residential and Income Eligible (IE) email and direct mail will more consistently be translated into both English and Spanish.	A Comparison of baseline data against post campaign data.	Completed and Ongoing. All IE direct mail includes Spanish. Moderate Income flyer renter/landlord also in Spanish. In Q4, 2022 had Income Eligible emails for CAPs in English, Spanish, and Portuguese.
2. Additionally, using lessons learned from the 2020 multi-cultural focused refrigerator recycling outreach campaign, the Company will launch a new, larger multi-cultural energy efficiency education campaign with the goal of increasing energy efficiency awareness and program participation among multi-cultural customers. Beginning with Hispanic customers, the effort will support the entire customer journey using new linguistic and cultural elements for web pages, customer toolkits, call-center support, and third-party partners. If the campaign is successful, it will be expanded beyond Hispanic customers.	<ol style="list-style-type: none"> 1. The completion of additional energy efficiency training for the Company's existing Customer Advocates. 2. The hire of a new Customer Advocate that will focus on energy efficiency. 3. The number of events the new Customer Advocate hosts/attends. 4. The number of Customers reached at these events. 5. The number of customers that sign up for a home energy assessment or an additional program related action as a direct result of the new Customer Advocate's community-based outreach efforts. 	Scheduled for 2023, 2022 was not a good time to launch the campaign given the sale of the Company.
2. Hire multilingual staff and partner with trusted leaders who have the same ethnic background and that frequent popular community gathering places such as community centers and faith-based organizations.		
1. Provide additional energy efficiency program training to the Company's existing Customer Advocates so they can more effectively speak to the benefits of the programs.		Completed. At Customer Assistance Expos IES Lead vendor is also in attendance to support efficiency.

<p>2. Hire an additional Customer Advocate that will focus on promoting the energy efficiency programs. The new Customer Advocate will have community organizing experience and will be multi-lingual. The Advocate will deliver energy efficiency program information at community centers, faith-based organizations, multi-family housing, and other community gathering places. The Customer Advocate will leverage the expertise of existing community organizations that serve diverse households. The new hire will occur by mid-2022, before summer events begin.</p>		<p>Completed- new hire effective May 2022.</p>
<p>3. Include in messaging that Rhode Island Energy is not code enforcement so residents can feel more comfortable.</p>		
<p>1. Provide vendor call centers with scripts to help answer any customer/landlord inquiries on this subject.</p>	<p>Whether or not a script has been provided to vendor call centers.</p>	<p>Completed</p>
<p>2. Consider adding the language to landlord outreach, as appropriate.</p>		<p>Completed</p>
<p>4. Develop age-appropriate marketing strategies to connect with various age groups that live in a household such as utilizing social media, apps, and text messaging to reach new audiences and help engage customers with their energy usage.</p>		
<p>Social media is one of the Company's primary outreach and communication methods, with advertisements and messages placed on Facebook, Instagram, Twitter, Snapchat, and NextDoor. Because of legal limitations and to ensure emergency communications are seen by customers, text messaging is currently only used to convey outage information.</p>	<p>N/A</p>	<p>Completed</p>
<p>5. Partner with other home visiting programs to expand the reach and impact of Rhode Island Energy's energy efficiency programs.</p>		

By March 2022, establish a working group to explore how to more comprehensively leverage other home visiting programs for energy efficiency outreach and education. The working group will be facilitated by the Company and will include home visiting program representatives. The working group will make related recommendations for the 2023 Annual Energy Efficiency Plan.	1. Whether or not a working group is established by March 2022. 2. Whether or not the working group completes recommendations by August 222 for the 2023 Annual Energy Efficiency Plan.	Completed- an outreach subgroup of the EWG has been created for this purpose
6. Allocate a proportion of Energy Efficiency marketing budgets to municipalities for mailing energy efficiency materials; some municipalities use third parties for mailing.		
1. Continue to support municipality efforts to promote energy efficiency through the Community Initiative.	1. The continuation of the Community Initiative.	Completed- working with the city of East Providence this year
2. Test the inclusion of energy efficiency program information in the water/sewer bills of one or more of the 2022 Community Initiative participants.	2. Call volume after the water/sewer bill insert(s).	This year's EWG recommended not to proceed with this activity since many customers receive e-bills and do not read inserts.
7. Provide incentives to community groups that are serving vulnerable populations.		
The Company will expand collateral for more community groups that serve vulnerable populations.	Number of community groups that receive collateral for distribution.	Completed and In Progress
8. Develop a mechanism that allows participation or action to occur immediately after the marketing step.		
Expand follow-up outreach for customers who receive a recommendation from the on-line home energy assessment, in-home/virtual home energy assessment, and/or home energy reports.	Tactics completed to increase follow-up outreach for customers.	Completed for in-home, virtual, and online assessments.
9. Benchmark Energy Efficiency Program participation data for race, geography, socioeconomic status, language, age of home, age of owner, age of renter, heating fuel type, type and age of heating /hot water/cooling systems.		

<p>1. Work with external stakeholders to determine if the data sets and each related report should be refreshed on a regular basis.</p>	<p>1. Completion of the Participant, Nonparticipant, and MF Census studies. 2. Presentation of report results at a public meeting, such as the Energy Efficiency Resource Management Council (EERMC). 3. Creation of a regular, zip code level participation report by Q2 2022 to target outreach for the EnergyWise, MF, and Income Eligible Single-Family programs. 4. Whether or not rental unit participation data continues to be gathered and reported quarterly at the "sector level meetings".</p>	<p>Completed- Participant, Nonparticipant and MF Census studies have been completed and reports have been shared with the EERMC. This data is being used to shape and direct outreach plans and will be used to assist with program design in the future.</p>
<p>2. Using internal data, establish a separate, regular report by Q2 2022 that shows participation for the EnergyWise, Multifamily, and the Income Eligible Single-Family programs at the zip code level. Utilize the report to target outreach.</p>		<p>Using year end spend by zip code as metric.</p>
<p>3. Continue gathering rental unit participation data and reporting on that information quarterly at the "sector level meetings" with the RI Office of Energy Resources, their Consultant Team, and the Division of Public Utilities and Carriers.</p>		<p>Completed</p>
<p>10. Track late payments and shut offs.</p>		
<p>2022 Commitments and Status</p>	<p>National Grid currently tracks this information and submits it to the RI PUC. The report can be found at: http://www.ripuc.ri.gov/eventsactions/docket/4770page.html, under Other Compliance Reports, National Grid's Low-Income Monthly pursuant to Article II, Section C.22.f. of the Amended Settlement Agreement.</p>	<p>N/A</p>
<p>11. Align energy efficiency programs with healthcare and partner to achieve healthcare goals, promote further engagement, and sharing health outcome and impact data.</p>		
<p>See recommendation 5.</p>	<p>1. Whether or not a working group is established by March 2022. 2. Whether or not the working group completes recommendations by August 222 for the 2023 Annual Energy Efficiency Plan.</p>	<p>Completed</p>
<p>12. Perform a full review of all HR policies and remove outdated policies that restrict hiring such as background checks.</p>		

<p>The Company believes it has reached the right balance to ensure the safety of customers and their property through its background check and exception process.</p>	<p>N/A</p>	<p>Completed</p>
<p>13. Reduce barriers to professional development, as well as entry into the energy efficiency workforce.</p>		
<p>1. Complete a workforce development needs assessment modeled after, and building on, this report completed in MA: <u>https://ma-eeac.org/wp-content/uploads/Massachusetts-Energy-Efficiency-Workforce-Development-FINAL-REPORT-CAREER-PROFILES.pdf</u>. Data from the needs assessment can be used to target future workforce development strategies, with diversity and upskilling of a diverse workforce as major areas of focus.</p>	<ol style="list-style-type: none"> 1. Completion of a RI workforce development needs assessment by December 2022. 2. Collaboration with the RI Builders Association on two additional trainings in 2022. 3. Completion of recruitment assistance to RI Builders Association and RI DHS, if necessary. 	<p>Will be conducted in 2023.</p>
<p>2. Continue the lead vendor collaboration with the RI Builders Association, and their affiliate Residential Construction Workforce Partnership, to complete at least two additional Energy Efficiency Program related trainings in 2022. RI Builders Association will report participant demographic information to the Company from the September 2021 training. If necessary, the Company will assist in the targeted recruitment of more diverse trainees for 2022. During 2022, the Company and/or its vendors will also collaborate with the RI Dept of Human Services (DHS) on workforce development efforts from U.S. Department of Energy training funds. RI DHS will also report participant demographic information to the Company, so the Company can assist in the targeted recruitment of more diverse trainees, if necessary.</p>		<p>Completed first cohort. 6 hires EE partners with 2 more hires pending. Second cohort is being trained.</p>
<p>14. Collaborate with local diverse community organizations to train and certify potential workers (Progresso Latino, Hispanic chamber of commerce, Cape Verdean community development).</p>		

See recommendation 13. The new workforce development needs assessment, as well as demographic reporting from the new trainings will help to determine whether new recruitment and upskilling efforts with a focus on diversity are necessary.	N/A	Workforce study will be completed in 2023.
---	-----	--

See Attachment 1 – Rhode Island Energy Efficiency Fourth Quarter Equity Update for more details.

Residential New Construction (RNC)

The Residential New Construction (RNC) program achieved 4,158 net lifetime MWh of electric savings (27.8% of the lifetime goal) and 81,410 net lifetime MMBtu of gas savings (125.4% of the lifetime goal) through the fourth quarter of 2022.

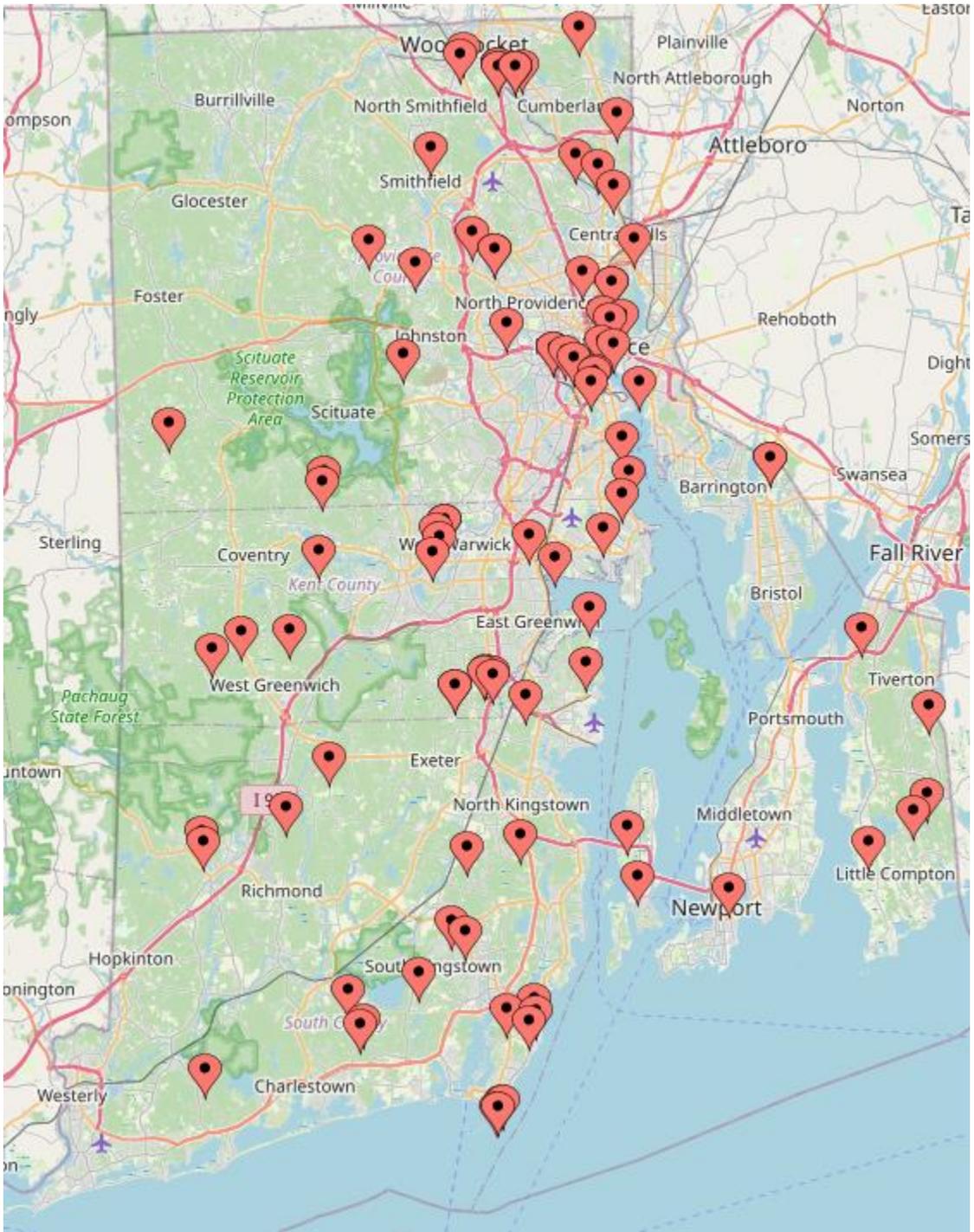
Q4 RNC Program Enrollments and Completed Units

- 263 housing units were built to RNC Program standards.
 - 57 units were new construction/full gut rehab (22%).
 - 206 were renovation/rehab (78%).
 - 23 units were market rate (9%).
 - 240 were income eligible (91%).
 - 215 units had gas heat (82%).
 - 32 units had all electric heat (heat pumps) (12%).
 - 8 units had hybrid electric/propane heat pumps (3%).
 - 609 LEDs were installed through the Program.
- 396 newly planned housing units enrolled in the RNC Program.

Total 2022 RNC Program Enrollments and Completed Units

- 431 housing units were built to RNC Program standards.
 - 196 units were new construction/full gut rehab (45%).
 - 235 were renovation/rehab (55%).
 - 169 units were market rate (39%).
 - 262 were income eligible (61%).
 - 282 units had gas heat (65%).
 - 61 units had all electric heat (heat pumps) (14%).
 - 55 units had hybrid electric/propane heat pumps (13%).
 - 3,842 LEDs were installed through the Program.

- 10 homes were Energy Star.
 - 4 homes were DOE ZER.
 - 6 homes were Passive House.
- 873 newly planned housing units enrolled in the RNC Program.
 - 649 units were income eligible (74%).



Q4 RNC Program Challenges

- Previous Construction Schedule Delays
 - New construction projects in planning and design phases in 2020 and 2021 got off to late starts due to issues with permitting, labor, material shortages, delayed funding, etc.
 - These delays resulted in fewer completed units than anticipated in 2022.
 - Many RNC Program projects originally slated to complete in 2022 shifted into 2023.
 - The RNC Program has continued to enroll new projects currently in planning and design phases into the program (873 units YTD, including 649 income eligible units), so the pipeline of projects is strong going into 2023 and 2024.
- New Construction & Renovation
 - There was a significant increase in the number of renovation units participating in the RNC Program in Q4.
 - 206 out of 263 units served were renovations.
 - Total annual renovations
 - 2022 – 235
 - 2021 – 25
 - 2020 - 54
- Gas & Electric
 - Most of the homes participating in the RNC program in Q4 were multifamily renovations that chose to keep gas as their primary source of heat.
 - This explains the significant percentage of RNC homes with gas heat compared to prior years.
 - Almost all gas renovation units were multifamily affordable housing.

Q4 RNC Program Highlights

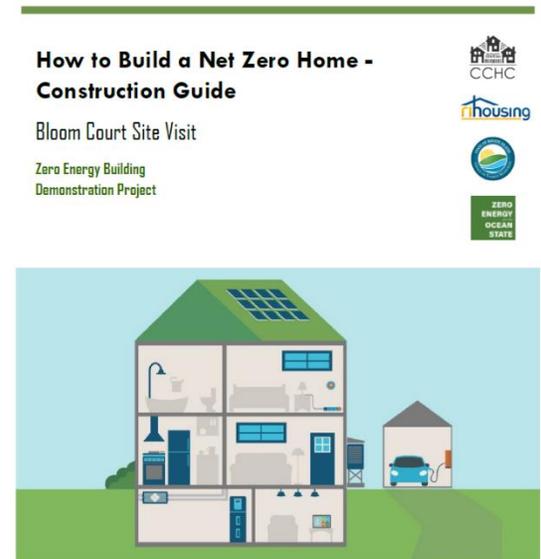
- 500 S Water Street, Providence
 - In 2011 a portion of the I-195 was relocated, freeing up over 26 acres of highway land for redevelopment.
 - A Commission was set up to oversee the sale, marketing, and redevelopment of the land.
 - The newly constructed apartment building at S Water Street was approved by the I-195 Commission as part of a section known as Parcel 6, which will consist of a total of 62 residential units, a grocery store and commercial/retail space.
 - The grocery store, Trader Joes, recently opened to the public providing local access to food.
 - 500 S Water Street consists of 30 housing units with high efficiency heat pumps.



Q4 RNC Program Zero Energy Project Highlights

- **Zero Energy Homes Pipeline**
 - The RNC Program Vendor continued to provide technical support for Zero Energy homes across the state, including 194 seeking Passive House certification and 6 seeking DOE Zero Energy Ready certification.

- **Bloom Court, Middletown (under construction)**
 - This affordable housing project developed by Church Community Housing consists of 2 new single-family, net zero energy homeownership units to replace two blighted and structurally unsound houses.
 - The project team held an Open House in November during which Seal Tight Energy Solutions was on site spraying AeroBarrier, a water-based sealant that is blown throughout the home before the drywall is installed to help seal any penetrations.
 - A blower door test was done before the installation began and the house measured at 2.5 ACH. During the install, they were able to get below 1 ACH.
 - The project team also shared a guide they developed for building net zero homes.



- **ZEOS Award**
 - ZEOS, a partnership between RI Office of Energy Resources, RI Housing and Rhode Island Energy which provides funding to support the development of local zero energy affordable housing, received a national award for program excellence from the National Council for State Housing Agencies (NCSHA).
 - The NCSHA Annual Awards for Program Excellence were created to identify and elevate industry best practices as well as encourage continued Housing Finance Agency (HFA) innovation.
 - The competitors for the national awards, which are given out annually at NCSHA's national conference, were each of the 50 states' HFAs plus four territories and districts.
 - www.ncsha.org/wp-content/uploads/Rhode-Island-Rental-Housing-Multifamily-Management-2022.pdf

To date several ZEOS funded projects have received technical support and incentives through the RNC Program, including Sheridan Small Homes, Brookside Terrace and Bloom Court, and upcoming projects include Bourne Mills III and Lockwood Plaza (rehab).

- **RNC Program Passive House Tour & Training**
 - 1492 Westminster Street, Providence, recently participated in the RNC Program and was certified for Energy Star, DOE Zero Energy Ready and Passive House.

- It is the first mixed-use, multifamily building in Rhode Island built to the exacting Passive House standards administered by the Passive House Institute US (PHIUS).
- Located on a narrow, vacant, urban infill site, it consists of a ground floor commercial space and seven one-bedroom apartment units, including an accessible unit on the ground floor.
- A tour of the project was held in December, with 22 attendees, including several graduates from the [RCWP](#) pre-apprentice program.
- Attendees gathered in the commercial space, which is currently occupied by Lucky Enough Eat and Drink, for a presentation on the project delivered by the RNC Program Vendor and the project team.



Attendees of the 1492 Westminster Street Passive House Mixed-Use Building Tour

Income Eligible Services (IES)

The Rhode Island Energy Income Eligible Services program achieved 27,760 net lifetime MWh of electric savings (72.1% of the lifetime goal) and 129,628 net lifetime MMBtu of gas savings (59.2% of the lifetime goal) through the fourth quarter of 2022.

The fourth quarter IES Best Practice meeting was held at Westbay CAP and was available virtually on 14 December 2022. This meeting focused on Rhode Island Energy Marketing, a DOE WAP update including timing and impact of the Bipartisan Infrastructure Law program, YTD program delivery performance, the WIFI Smart Thermostat program, and new product demonstrations by Tamarack Technology. Representatives from 6 CAP agencies, Rhode Island Department of Human Service, Division of Public Utilities & Carriers, the Energy Efficiency Resource Management Council, Rhode Island Energy, and CLEAResult attended.

The WiFi Smart Thermostat process is moving from theoretical to applied. Equipment selection trainings have been held both in person and virtually. The next phase of training will focus on agency experience with installation.

The KPI process continued in the fourth quarter to improve communications between CAPs and the Lead Agency. KPI meetings were held with each CAP, the Company's lead vendor and at least one RI Department of Human Services (DHS) representative. These meetings ensure that the CAPs are aware of their KPI goals, their pace to meet the goals and provide a dedicated time for constructive dialog.

CLEAResult, in the Lead Appliance Agency role for Rhode Island has improved communication across the program with the assistance of the Local Appliance Vendor, SMOC, and the Local agencies. CLEAResult processed over \$1,500,000 in Appliance invoices in Q4, an increase over Q3.

CLEAResult participated in the Policy Advisory Committee (PAC) meeting to develop the Bipartisan Infrastructure Law (BIL) State Plan Application. The PAC is the group that has assisted the Department of Human Services chart a course for a successful Department of Energy program for 2023 and beyond. A facet of the BIL that was noted by the PAC is budget offsets based on performance. This process is under review.

Challenges and Responses

Providing services equitably to all Rhode Island Income Eligible Customer continues to be a challenge.

Supply shortages are decreasing, enhancing implementation particularly for appliances. The emergency appliance replacement program for customers whose refrigerator is no longer functioning has reduced the wait time for customers waiting for a new appliance. The system also improves tracking and reporting of all emergency responses.

Staffing at some CAPs continues to be a challenge to IES Program implementation. IES is implementing several approaches to reducing the impact of these barriers:

- Contracting for additional auditors providing freelance audit services to the agencies. Regrettably, the CAP agencies that need the additional audit services the most also lag in their contractor management processes.
- The Interagency Referral program where leads or completed audits are referred by one CAP agency to another CAP agency for implementation services. This process will become mandatory for 2023, based on Q1 performance, particularly in areas where historic equity issues are a concern.

RIBA Auditor & Installer program, RWCP (Residential Construction Weatherization Program) is building a class for spring of 2023. This class will be sponsored by RI DHS and RIE IES.

Customer Highlight

John from Barrington said, “I don’t know anyone who doesn’t like to save money!” John also took a moment to praise the Auditor, “Nick F was excellent! Professional, courteous, and knowledgeable.”

John wasn’t Nicks only fan! Joanne from Tiverton stated, “Nicholas F was very worthwhile, very helpful.”

Nick is a graduate of the Residential Construction Workforce Partnership (RCWP) developed by Rhode Island Builders Association (RIBA) & RI WAP/IES.

EnergyWise Single Family

The EnergyWise Single Family program achieved 12,661 net lifetime MWh of electric savings (94.0% of the lifetime goal) and 526,242 net lifetime MMBtu of gas savings (110.0% of the lifetime goal) through the fourth quarter of 2022.

The EnergyWise program conducted 2,898 home energy assessments and completed 1,039 weatherization projects in the fourth quarter. 270 customers financed their weatherization work with the HEAT loan. The RGGI Moderate Income offering is actively being promoted, and the program has served 91 RGGI moderate income customers.

Activities of interest include:

- The company and/or the lead vendor attended the following events:
 - Latina 100.3 Latin festival on Oct 8th with Bi-Lingual RISE representatives.
 - The Company staffed a Rhode Island Energy information booth at the Waterfire Salute to Veterans event on November 5th 2022.
- The lead vendor hired three new Energy Specialists in Q4.
- The pin hole insulation pilot with BEM was completed and invoiced in Q4.
- Through Q4, 12% of assessments and 10% of weatherization participants are renters/landlords.
- Spanish and English outreach for the moderate-income weatherization offering continues using RGGI moderate income funding.

Challenges and Responses

The timeframe for the scheduling and delivery of Home Energy Assessments is longer than is optimal. The lead vendor continues to make the hiring of Energy Specialists a priority and is exploring options to secure additional short-term auditing staff resources.

Customer Highlights

Customer feedback themes from the HEA included:

- Some customers expressed disappointment that the Heat loan did not cover a broader range of measures including window replacement.
- Many customers commented on the professionalism and technical knowledge exhibited by the auditor who conducted their HEA and the responsiveness of the scheduling staff.

Customer feedback themes from weatherization contractors included:

- Many customers had strong praise for their contractors and Rise Engineering as well as the Energy Wise program as a whole.
- Several customers stated that they noticed the improved comfort in their homes immediately after the completion of their weatherization project.

EnergyWise Multifamily, Income Eligible Multifamily, C&I Multifamily

The EnergyWise Multifamily program achieved 3,441 net lifetime MWh of electric savings (16.6% of the lifetime goal) and 51,314 net lifetime MMBtu of gas savings (34.9% of the lifetime goal) through the fourth quarter of 2022. The Income Eligible Multifamily program achieved 17,288 net lifetime MWh of electric savings (71.1% of the lifetime goal) and 217,169 net lifetime MMBtu of gas savings (79.5% of lifetime goal) through the fourth quarter of 2022. The C&I Multifamily program achieved 58,963 net lifetime MMBtu of gas savings (44.9% of the lifetime goal) through the fourth quarter of 2022.

Customer Highlights

Income Eligible Projects (3)

1.) Affordable Housing Apartments in Woonsocket RI

Replacement of (24) existing 375 MBH heat boilers with (6) 850 MBH and (2) 400 MBH high efficiency condensing boilers. The existing DHW and heating system circulator pumps were also replaced with new high efficiency circulator pumps with speed control. Also included in this project was installation of a cogeneration unit (mCHP) 24kW to

enable local electric generation while providing assistance to the DHW and heating systems.

The electric incentive for this installation was \$345,542 and has an estimated 3,343,920 net lifetime kWh savings. The gas portion of the project was \$671,881 and has an estimated 282,882 net lifetime therms savings.

2.) Affordable Housing Apartments in Woonsocket RI

Replacement of (22) existing 375 MBH heat boilers with (4) 850 MBH and (2) 285 MBH high efficiency condensing boilers. The existing DHW and heating system circulator pumps were also replaced with new high efficiency circulator pumps with speed control. Also included in this project was installation of a cogeneration unit (mCHP) 24kW to enable local electric generation while providing assistance to the DHW and heating systems.

The electric incentive for this installation was \$327,817 and has an estimated 3,643,410 net lifetime kWh savings. The gas portion of the project was \$385,733 and has an estimated 138,917 net lifetime therms savings.

3.) Affordable Housing Apartments in Tiverton RI - Air Source Heat Pumps:

Replacement of existing heating, cooling and DHW systems with 44 Fujitsu single zone ducted heat pumps and 21 AO Smith heat pump water heaters.

The electric incentive for this installation was \$799,999 and has an estimated 4,428,900 net lifetime kWh savings.

Standard Income Electric and Commercial Gas Project Providence RI:

Replacement of (1) existing 300 MBH heating boiler with (1) 285 MBH high efficiency condensing boiler. The existing DHW and (8) heating system circulators were also replaced with high efficiency circulator pumps with speed control.

The electric portion of the project was \$3,500 and has an estimated 21,410 net lifetime kWh savings. The commercial gas incentive for this installation was \$32,247 and has an estimated 23,219 net lifetime therms savings.

Challenges and Responses

Material lead times continue to cause significant project delays for heating and cooling retrofits. The lead time for most equipment is 8-12 weeks out from the initial order.

The Lead Vendor continues to follow up with customers and contractors regularly to keep projects moving forward and they are completing all other aspects of a project while awaiting necessary materials.

Workforce Development

In the fourth quarter the Lead Vendor's mechanical staff completed hydronic pump training held by B&G. The training included orientation on new products and the review of techniques on how to apply pumps based on the application.

ENERGYSTAR® HVAC (Heating and Cooling)

The ENERGYSTAR® HVAC (Heating and Cooling) program achieved 110,361 net lifetime MWh of electric savings (142.0% of the lifetime annual goal) and 380,427 net lifetime MMBtu of gas savings (86.5% of the lifetime goal) during the third quarter of 2022.

Q4 HVAC Contractor Trainings

- 6 half-day and quarter-day contractor trainings were held during the fourth quarter, providing both refresher courses and new trainings for HVAC technicians.
- The HVAC Program offers several types of HVAC Check trainings:
 - HVAC Check, which includes both AC Check and MS Check.
 - MS Check, specifically for contractors who only install mini splits.
 - AC Check & MS Check as separate modules, to make it easier for contractors to fit training into their schedules.
- Trainings were modified for and delivered to sales staff and distributors.
- Contractor feedback:
 - “My company and technicians have benefited from the recent HVAC checks training sessions as well as our customers who have systems that are operating efficiently all thanks to the training provided by CLEAResult” – HVAC Program Participating Contractor.

Q4 HVAC Check Testing

- The HVAC Program team actively reached out to HVAC contractors during the fourth quarter to encourage them to perform testing on both new systems and existing systems during preventative maintenance visits to ensure proper operation.

- This testing can only be performed in warm weather months, so it was important to promote before the cold weather arrived.
- 92 HVAC Check tests were performed by HVAC contractors during the fourth quarter.

Q4 HVAC Enhanced Rebate Quality Control Inspections

- 94 Quality Control (QC) inspections were performed on recently installed heat pumps.
- These inspections verify equipment eligibility and provide an opportunity to connect with residents to determine how well their systems are operating, and to share best practices for successful operation.

Q4 HVAC Program Participating Contractors

- Rhode Island Energy provides customers with a list of Program Participating Contractors.
- To be listed (and stay listed) contractors must attend a Program Training, and perform a minimum number of HVAC Check tests each year.
- Only Participating Contractors can offer Enhanced Rebates.
- During the fourth quarter the HVAC Program team followed up with both new and existing contractors to offer training and technical support, and to ensure they met and continue to meet the requirements for being listed.
- There are currently 106 HVAC Program-approved contractors on the list.

Q4 HVAC Program Highlight

The HVAC Program Vendor attended a dealer meeting sponsored by Mitsubishi in Newport, RI. They staffed a table where attendees had access to rebate applications, a schedule for future training opportunities, the “roadmap to rebates”, best practices for installation and other documents to discuss with the team and take with them as they wished. It provided the chance to have face to face conversations with industry colleagues about the challenges they face, how to use the rebates as a selling tool, best practices, and other matters that they face.

It was also an opportunity to help resolve specific issues that some contractors were facing and to share what is known about the future of the programs and what they can expect for the coming new year. There were discussions about the new SEER2 energy efficiency ratings and how we expect that to affect our programs.

Additionally, we raised awareness about the up-coming High Efficiency Heat Pump Program that will be managed by OER that will provide enhanced rebates to qualifying heat pump customers.

Several people who represented our host spoke at length about the supply chain issues they had been facing and apologized for not planning better to prepare for what turned out to be a very difficult set of circumstances leading to very lengthy delays in delivering product to the marketplace.

Q4 HVAC Program Challenges

- The program is fielding increasing customer and contractor questions/concerns about new equipment SEER2 requirements.
 - DOE has released new standards for rating the efficiency of heat pumps.
 - Existing systems will need to recertify but can continue to be sold through 2024.
 - There will be a mix of SEER and SEER2 rated equipment in the marketplace which can be challenging when verifying for rebate eligibility.
 - 2023 rebate forms are being revised noting the eligibility of both ratings.
 - The program is working to incorporate the new SEER2 rated equipment into the program, as it becomes available.
 - 2023 will be a transition year, with the expectation that only SEER2 rated equipment will be eligible for rebates beginning in 2024.
- The program also received a lot of questions about the new federal tax credits, as well as OER's High-efficiency Heat Pump Program, as contractors and customers try to make decisions about selling and installing heat pumps.

- The team prepares and distributes a weekly HVAC Program newsletter specifically for HVAC companies, contractors, technicians, distributors, and other trade allies.
- Topics for the newsletter during the fourth quarter included reminders for HVAC vendor staff, SEER2 requirement updates, reminders and deadlines and links to upcoming HVAC Check trainings, and program continuation updates.
- The newsletter also contained information and links to programs such as EnergyWise and the HEAT Loan.
- There are 650+ recipients on the distribution list.

**Rhode Island HVAC Report
Weekly Update**
December 20, 2022



Happy Holidays!

Energy Star AHRI SEER2 Ratings/ 2023 Federal Tax Credit Tiers

- The Department of Energy has announced a revised Energy Star AHRI SEER2 rating procedure.
- Many AHRI Numbers have been updated to SEER 2 without cross reference to previous ratings, creating rebate rejections - RI HVAC Program staff can verify eligibility.
- Contractors and distributors will be allowed to sell and install SEER rated equipment in 2023.
- For a copy of the **Energy Star v.6.1** specification click [HERE](#).

Q4 High Efficiency Gas Program Support

- The HVAC Program team continued to promote Rhode Island Energy’s high efficiency gas rebates to distributors, gas equipment factory representatives and contractors through the weekly newsletter and through direct contact (email, phone).

Residential Consumer Products

The Residential Consumer Products program achieved 17,380 net lifetime MWh of electric savings (36.5% of the lifetime goal) through the fourth quarter of 2022.

Rhode Island Energy finished up the 2022 dehumidifier turn-in campaigns with over one-thousand dehumidifiers recycled, far exceeding the 2021 results. These events not only provide the program energy savings, but also are an excellent opportunity to enhance Rhode Island Energy’s reputation as a partner in the community. Giving us the opportunity educate customers about \$30 incentive for the purchase of a new Energy Star dehumidifier as well as a wide variety of other energy efficiency products and HVAC equipment.

New Initiatives Launched:

- The Most Efficient Appliance Initiative launched in late 2022: Rhode Island Energy and The Home Depot teamed up this year on a new offering to encourage the purchase and stocking of the Energy Star Most Efficient Refrigerators and Clothes Washers. In 2022, Rhode Island Energy customers purchased 143 Most Efficient Refrigerators and 11 Most Efficient Clothes Washers. This was a very successful outcome that was promoted to the consumer in eight (8) Home Depot locations in Rhode Island. The desire would be to expand this initiative in 2023.
- APS Strips: In the fall, Rhode Island Energy signed an agreement with Ocean State Job Lot to provide incentives on Advanced Power Strips (APS). The incentives were offered at the 18 OSJL stores located in Rhode Island. In total approximately 4,170 APS strips were purchased by Rhode Island Energy customers.

The Pool Pump installation season has come to a close and Rhode Island Energy customers received incentives on 364 variable speed (VSD/VFD) drives.

Q4 Residential Consumer Products Challenges

Rhode Island Energy will continue to research new product opportunities in 2023 (and beyond) including, but not limited to, heat pump pool water heaters, DIY, heat pump products (i.e., Mr. Kool Products), induction cook tops, high-efficiency radon fan motors and battery-operated outdoor lawn equipment.

Big box retailers continue to report product sales across the nation are down and believe consumer buying habits are the result of current economic challenges.

Home Energy Reports (HER)

The Home Energy Reports (HER) program achieved 30,920 net lifetime MWh of electric savings (115.2% of the lifetime annual goal) and 115,053 net lifetime MMBtu of gas savings (123.0% of the lifetime goal) through the fourth quarter of 2022.

In the fourth quarter, Home Energy Reports had black Friday pricing on smart thermostats through the online marketplace and featured information on heat pumps and gas heating equipment.

Now's the perfect time to get a smart thermostat



This November, we're offering special discounts on smart thermostats for Black Friday. Visit the Rhode Island Energy Marketplace online to order an affordable model from a top brand like Google Nest, Honeywell, ecobee, and Emerson. With smart thermostats ranging from \$14.99 to \$104, there's a model to fit everyone's budget and needs. Instant rebates are exclusively for Rhode Island Energy customers.

[Shop the Energy Marketplace](#)

Save more this fall with upgraded heating equipment



Is your heating equipment getting older or not performing well? It might be time to think about a new energy-efficient model, and fall is the perfect time to upgrade. We can help you save energy and money with exclusive rebates of up to \$1,200 on high-efficiency gas boilers and furnaces.

[Learn more](#)

Save with rebates on a new cold-climate heat pump

Enjoy year-round comfort with a new heat pump system

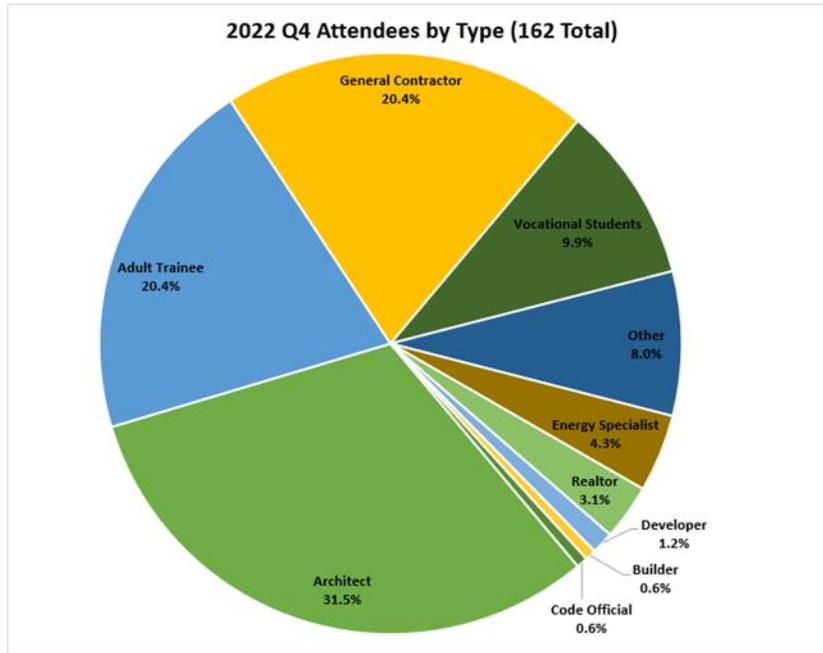
Got a heating and/or cooling system that's starting to get old? It might be time to upgrade to the all-in-one convenience of a cold-climate heat pump. No matter the season, heat pump technology helps you stay cool in the summer and warm in the winter. Plus, we offer a variety of generous rebates, so you'll save even more when you upgrade.

Find heat pump rebates and more at rienergy.com/heatpumps.



Code Compliance Enhancement Initiative (CCEI)

The Company sponsored 10 CCEI training events that engaged 162 industry participants this quarter. This included eight trainings focused on residential construction with 127 attendees and two commercial training with 35 attendees.



Q4 Training Participants – Attendees by Type

The Company and its vendor continued to partner with several organizations to sponsor and promote trainings in the fourth quarter. Organizations include Rhode Island Builders Association (RIBA), American Institute of Architects - Rhode Island (AIA-RI), and New England Building Officials Association. Topics included:

- One- and Two- Family Dwelling Code
- Understanding the House as a System
- RI Residential Energy Code (including recent changes)
- HVAC Design for Large Spaces with Low Energy Loads
- Tour of AIA-accredited Providence Library
- Zero-Energy Homes: Heat Pump Duct Design
- Introduction to Building Commissioning

The Company's vendor also continued to partner with a pre-apprentice training course coordinated through the Residential Construction Workforce Partnership.

Providence Public Library Renovation

The [Providence Public Library](#) conducted a major [renovation](#) of its facility at 150 Empire Street in Providence, RI to better meet the needs of the community and the existing collections. The THINK AGAIN Building Transformation reconfigured the 1954 portion of the building into a modern information and gathering space, updated and reconnected the Donald J. Farish auditorium, and created a new climate-controlled home for the library's special collections, which include numerous rare and historic volumes.

Presentation and Tour

Tuesday, December 13, 2022
12:00 PM - 3:00 PM

Sponsored by [Rhode Island Energy](#), hosted by [CLEAResult](#), and presented by [Nate Taylor](#), a project manager at [Stephen Turner Inc.](#)

This tour and commercial energy code training will highlight how the project was constructed to meet the state energy codes.

Learning Objectives:

- Learn about the current Rhode Island commercial energy codes, energy code background and energy code compliance pathways
- We will discuss how energy efficiency measures were incorporated into the building design
- Along with the high-performance building enclosure with improved thermal envelope, high efficiency HVAC equipment and lighting controls
- Learn about [C-PACE](#), the funding mechanism, and [Nuvenn Green Capital](#), the financial institution, that were utilized to subsidize the project along with [Rhode Island Energy's Energy Code programs](#), which offers free training and technical support.

These trainings are approved for RI Contractor Registration and Licensing Board continuing education units. Since the onset of COVID-19, most trainings have been held virtually, which typically increases attendance.

Challenges and Responses

The next Rhode Island Energy Conservation Code is expected to be based on IECC 2021. The Company anticipates the state's next Code will be adopted in 2023. The Residential portion of the Energy Conservation code is expected to be substantially more stringent than current code. Although this will save energy over the long term, the Company's vendor raised concerns that many builders, architects, and building code officials are not familiar with design techniques necessary to meet IECC 2021, and there will be a steep learning curve. In the near term, this may lead to design and construction errors that result in issues related to durability and indoor air quality. To help mitigate this risk, the Company and its vendor are collaborating with the Rhode Island Building Code Commission to train as many Rhode Island builders, architects, and code officials as possible on building techniques to meet the new code requirements.

Large Commercial New Construction

The Large Commercial New Construction program achieved 97,510 net lifetime MWh of electric savings (50.7% of goal) and 570,255 net lifetime MMBtu of gas savings (72.3% of goal) through the fourth quarter of 2022.

In the Q4, the program team completed its redesign of the New Construction whole building pathways. The redesign streamlined the program by reducing the number of pathways from four to two and making it simpler for customers to participate.

There are 40 active projects in Q4. The new construction program team is currently:

- Working with the State of Rhode Island on a large State lab building and conducting a study of the building.
- Conducting a study with the State for a new 60,000-square foot state police barracks that is currently trending to meet the Zero Net Energy criterion under the program.
- Working with the 111 Westminster project and awaiting the decision on the metering structure to determine whether the building will be a residential or commercially metered building.
- Started to work with a private university on its new integrated science building.
- Completed the first review of a new stadium complex in Pawtucket.

Challenges and Responses

The New Construction team continues to research ways to maintain program savings as the energy code becomes more stringent. Although these changes align with the goals of the energy efficiency programs (helping customers use less energy), it means less claimable program savings.

Lighting and gas measures were particularly hard hit, and even HVAC controls measures (such as demand controlled ventilation) are now considered baseline. The Company has updated savings calculations to account for these baseline changes.

The slowdown of project design and construction that began in Q2 has improved somewhat, but continued supply chain delays, coupled with increased material and labor costs, continue to be a drag on construction activity.

Large Commercial Retrofit

The Large Commercial Retrofit program achieved 343,841 net lifetime MWh of electric savings (109.9% of goal) and 1,374,881 net lifetime MMBtu of gas savings (103.2% of goal) through the fourth quarter of 2022.

Building Analytics

In Q4, Rhode Island Energy officially kicked off the new Building Analytics Program (BAP) with its implementation vendor and several service providers. This initiative will provide funding for implementation of software platforms and associated services to identify opportunities to

improve the performance and longevity of HVAC and other equipment managed using building automation systems.

BAP is part of the Equipment and Systems Performance Optimization (ESPO) initiative and builds on the prior monitoring-based commissioning (MBCx) offering. Like MBCx, the new BAP offering will provide incentives for savings achieved using analytics platforms; however, the new offering also mitigates customer risk and workload by offering incentives for:

- Up-front installation (not just savings)
- Enhanced technical assistance
- Streamlined reporting requirements
- A list of Qualified Service Providers vetted by the Company's implementation vendor

Industrial Initiative

The Company's vendor worked with a customer that had installed a building analytics system in 2016 and has participated in the ESPO initiative for several years. The system identified an opportunity to reduce simultaneous heating and cooling occurring at the site. Faulty equipment had been resulting in significant overheating, with cooling systems activating to offset the excess heating. By fixing the equipment, the customer reduced its gas consumption (for heating) by 123,937 therms and electric consumption (for cooling and ventilation) by 584,764 kWh.

This was achieved using equipment data extracted from the existing building automation system in five-minute intervals, stored in the cloud, and analyzed using the analytics platform. A digital model of HVAC equipment was created that includes control sequences, mechanical schedules, and various data points to create a simulation of equipment operation. The building analytics engine constantly diagnoses system and equipment operation and identifies issues, prioritizing them based on impact to energy consumption, indoor environment, and equipment reliability to create a punch list of items to address.

EnergySmart Grocer Initiative

A national grocery chain embarked on an effort to complete several energy efficiency projects, which included adding doors to food display cases wherever possible. In Q4, several of these projects were completed. The Company installed glass doors to refrigerated cases at four locations in RI, resulting in gross annual energy savings of 256,691 kWh and 23,060 therms. The Company contributed \$123,423 in rebates to help the customer complete these upgrades.



Another major grocery chain renovated and re-opened its Warwick location, which was originally built in 2008. The new design includes several highly efficient features:

- Heat reclamation
- Special low/no heat doors
- High-efficiency lighting

These measures resulted in gross annual energy savings of 25,032 kWh and 3,683 therms. The Company provided an incentive of \$8,580 to support these upgrades.



Strategic Energy Management Partnerships (SEMP)

New & Extended SEMPs

During Q4 of 2022, RI Energy and signed a Strategic Energy Management Partnership Memorandum of Understanding (MOU) with a major retailer. This non-binding, three-year agreement establishes an energy efficiency commitment for the retailer's entire Rhode Island footprint, including the corporate headquarters campus, distribution and retail facilities.

RI Energy and Quonset Development Corporation (QDC) also signed an MOU to extend this successful partnership for three years (2023 to 2025). RI Energy and QDC will continue to work together to engage the 200+ businesses at Quonset Industrial Park (employing 13,000 workers) in energy efficiency programs.

Public Schools

Rhode Island Energy has partnered the state's Office of Energy Resources (OER) and Department of Education (DOE) to provide technical, procurement, implementation, and financial resources to helping public schools to implement more energy-efficient equipment and practices at their facilities. In addition to the standard energy efficiency pathways, OER and DOE have partnered with the Company on two initiatives:

- School Lighting Accelerator Program – Part of the state's Lead by Example initiative, this effort helps schools to upgrade to LED lighting with controls in order to reduce energy use and improve lighting quality.
- Energy Improvements for Rhode Island Schools – Funded by the U.S. Department of Energy in response to concerns related to COVID-19, this program helps schools upgrade their HVAC systems and building controls to improve indoor air quality, while reducing energy consumption and improving the comfort of students, teachers, and other building occupants.

These efforts are focused in ten priority communities: Central Falls, Providence, Pawtucket, Woonsocket, West Warwick, East Providence, North Providence, Cranston, Coventry, and Burrillville. To date, \$20 million have been allocated to these efforts.

Challenges and Responses

The Company continued to observe significant delays in project timelines resulting from supply chain delays, although these have lessened somewhat. Delivery times and pricing remain somewhat elevated for lighting materials and any equipment requiring computer chips to operate (such as variable frequency drives). To help mitigate these delays, the Company continues to work with its partners to help customers, contractors, and distributors identify alternative equipment with shorter lead times.

The Company's vendor for the Grocer initiative reported that in Q4, time constraints due to customer traffic during holiday peaks impeded access to some locations. Labor issues continue to be a problem, specifically, around the availability of qualified refrigeration contractors as qualified refrigeration contractors retire and few younger workers pursue careers in refrigeration.

Small Business Direct Install

The Small Business Direct Install (SBDI) program achieved 57,025 net lifetime MWh of electric savings (88.6% of goal) and 78,711 lifetime MMBtu of gas savings (85.8% of goal) in 2022.

Enhanced reporting

To show progress on priority initiatives, the Company is reporting the number of weatherization projects and LED retrofit kits and luminaires (with and without controls).

There were 82 weatherization projects in 2022, including 82 gas weatherizations, leveraging RGGI funds provided by OER to supplement the system benefits charge (SBC) funds to enhance customer economics for these projects. The table below shows the number of luminaires and retrofit kits with controls for 2020, 2021, and 2022.

Period	Luminaires	Luminaires with controls	Retrofit kits	Retrofit kits with controls
2020	13,032	149	17,260	450
2021	12,804	246	15,932	908
2022	9,918	2,256	8,675	856

Project Highlights

An office building that hosts several small businesses in Providence installed LED fixtures with integrated controls throughout the building, along with exterior lighting upgrades. This project cost \$109,520, with gross annual savings of 154,665 kWh.

A meat market owner who attended the “Pawtucket Presents” event hosted by the SBDI vendor signed up his business to participate in the program. With help from the on-bill repayment option, the building was updated with LED lighting, spray valves, aerators, and WiFi thermostats. New electronically commutated motors were installed to reduce heat generation in the cooled space, reducing refrigeration load and saving energy. The project cost \$70,414 and achieved gross annual savings of 93,475 kWh and 231 therms.

Thanks to the partnership with Rhode Island Office of Energy Resources, over eighty small business received incentives up to 100% for air sealing, insulation, and ventilation in 2022. These measures will help reduce emissions and improve building comfort during cold winter and hot summer months.

Challenges and Responses

The period saw a continued slowdown in demand for program services, including lighting, weatherization, and other measures. The Company and its vendor undertook marketing activities

in Q4 to increase demand, including a direct mail campaign and a whitepaper campaign. The whitepaper resulted in over 500 leads, which were shared with the SBDI vendor.

Evaluation, Measurement, and Verification

No new studies were completed in the fourth quarter of 2022.

Several studies were in progress at the end of 2022:

- Residential New Construction and Code Compliance Study
- Small Business Process Evaluation
- C&I New Construction Baseline Study
- Automated RTU Optimization Demonstration Evaluation
- Impact Evaluation of PY2021 Custom Gas Installations
- Impact Evaluation of PY2021 Custom Electric Installations
- Comprehensive Measure Life Review

The Company will provide further updates on these studies in 2023.

ConnectedSolutions

The 2022 ConnectedSolutions results are being finalized and will be reported in the 2022 year-end report.

Pilots, Demonstrations, Assessments

PDA Name		Q4 2022 Updates
<u>New Air Sealing & Insulation - Demonstration - Resi</u>	Date	7/8/2022
	Stage	Retire
	Recent Activity	n/a
	Next steps	Retire demonstration
<u>Solar Inverter DLC - Demonstration - Resi</u>	Date	7/18/2022
	Stage	Launch
	Recent Activity	Successfully demonstrated technology
	Next steps	Launch full-scale program in 2023.
<u>Final Gas Appliances - Assessment - Resi</u>	Date	1/26/2023
	Stage	Qualify
	Recent Activity	Continue assessing opportunities for electric appliances at new homes
	Next steps	Finalize assessment

<u>Gas HPs - Demonstration - Resi</u>	Date	7/8/2022
	Stage	Retire
	Recent Activity	Due to limited product interest and slow payback periods, this demonstration was retired.
	Next steps	Retire demonstration
<u>HVAC Lighting Controls Plus - Demonstration - C&I</u>	Date	10/21/2022
	Stage	Retire
	Recent Activity	Completed Demonstration. Concluded limited potential for NLC+HVAC approach.
	Next steps	Retire demonstration
<u>Building Flexibility through DR - Assessment - C&I</u>	Date	1/26/2023
	Stage	Develop or Demonstrate
	Recent Activity	Study with DNV complete
	Next steps	Evaluate results
<u>Refrigeration Leak Survey & Repair - Demonstration - C&I</u>	Date	10/25/2022
	Stage	Develop or Demonstrate
	Recent Activity	Post-installation monitoring of refrigerant leakage completed. Analysis in process.
	Next steps	Complete savings and cost effectiveness analysis.
<u>Gas DR - Pilot - C&I</u>	Date	1/26/2023
	Stage	Demonstrate
	Recent Activity	Active for Winter 2022-23
	Next steps	Conduct winter program
<u>Gas HPs - Demonstration - C&I</u>	Date	7/8/2022
	Stage	Retire
	Recent Activity	Attempted customer recruitment with little success.
	Next steps	Retire demonstration
<u>Rightsizing RTUs - Assessment - C&I</u>	Date	1/26/2023
	Stage	Plan
	Recent Activity	Completed assessment, which ID'd strategies for RTU right-sizing
	Next steps	Integrate strategies into program design and implementation
	Date	1/26/23

<u>Automated RTU Optimization - Demonstration - C&I</u>	Stage	Demonstrate
	Recent Activity	Recruiting customers; installing product and monitoring equipment
	Next steps	Measure winter performance
<u>SEM/CEI - Demonstration - C&I</u>	Date	7/8/2022
	Stage	Retire
	Recent Activity	Closed out final CEI projects
	Next steps	Retire demonstration
<u>Air Curtains - Demonstration - C&I</u>	Date	1/26/2023
	Stage	Qualify
	Recent Activity	Opted to develop measure offering, in line with MA PA's.
	Next steps	Collaborate with MA develop program offering and develop go-to-market plan
<u>Smart Valves for Chilled Water Systems - Demonstration - C&I</u>	Date	10/25/2022
	Stage	Develop or Demonstrate
	Recent Activity	Completed monitoring of operating chillers. Analyzing data.
	Next steps	Finalize analysis of savings and cost effectiveness. Develop go-to-market strategy.

RHODE ISLAND ENERGY EFFICIENCY PROGRAMS IN RHODE ISLAND
Table 1: Summary of Electric 2022 Target and Preliminary 4th Quarter Results

ELECTRIC PROGRAMS Sector and Program	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(18)	(13)	(14)	(15)	(19)	(16)	(17)
	Demand Reduction (Annual kW)			Energy Savings (Annual MWh)			Customer Participation			Expenses (\$ 000)				Energy Savings (Lifetime MWh)				\$/Lifetime kwh	
	Target	Year To Date	Pct Achieved	Target	Year To Date	Pct Achieved	Target	Year To Date	Pct Achieved	Budget	Year To Date	Pct Achieved	Year End Forecast	Target	Year to Date	Pct Achieved	Year End Forecast	Target \$/kWh	Year to Date
Commercial and Industrial																			
Large Commercial New Construction	1,745	804	46.1%	12,589	6,774	53.8%	96	46	48.1%	\$ 9,034.1	\$ 4,128.7	45.7%	45.7%	192,343	97,510	50.7%	50.7%	\$ 0.047	\$ 0.042
Large Commercial Retrofit	8,490	6,431	75.7%	41,132	43,015	104.6%	2,239	2,693	120.3%	\$ 25,010.5	\$ 17,993.1	71.9%	71.9%	312,931	343,841	109.9%	109.9%	\$ 0.080	\$ 0.052
Small Business Direct Install	904	1,213	134.1%	9,976	6,944	69.6%	490	412	84.1%	\$ 8,883.3	\$ 5,644.6	63.5%	63.5%	64,394	57,025	88.6%	88.6%	\$ 0.138	\$ 0.099
Commercial Connected Solutions										\$ 4,393.6	\$ 4,704.9	107.1%	107.1%						
Community Based Initiatives - C&I										\$ 85.0	\$ 8.8	10.3%	10.3%						
Financing										\$ 2,000.0	\$ -	0.0%	0.0%						
Commercial Workforce Development										\$ 157.5	\$ -	0.0%	0.0%						
SUBTOTAL	11,139	8,447	75.8%	63,696	56,733	89.1%	2,825	3,151	111.5%	\$ 49,564.1	\$ 32,480.1	65.5%	65.5%	569,668	498,376	87.5%	87.5%	\$ 0.087	\$ 0.065
Income Eligible Residential																			
Single Family - Income Eligible Services	480	395	82.4%	3,314	2,371	71.6%	3,583	4,569	127.5%	\$ 13,275.3	\$ 10,203.9	76.9%	76.9%	38,506	27,760	72.1%	72.1%	\$ 0.345	\$ 0.368
Income Eligible Multifamily	49	62	126.7%	1,538	1,419	92.3%	3,600	1,272	35.3%	\$ 3,538.9	\$ 2,573.2	72.7%	72.7%	24,309	17,288	71.1%	71.1%	\$ 0.146	\$ 0.149
SUBTOTAL	529	458	86.5%	4,851	3,790	78.1%	7,183	5,841	81.3%	\$ 16,814.3	\$ 12,777.0	76.0%	76.0%	62,816	45,048	71.7%	71.7%	\$ 0.268	\$ 0.284
Non-Income Eligible Residential																			
Residential New Construction	74	49	66.1%	867	212	24.5%	462	431	93.3%	\$ 1,617.0	\$ 1,101.6	68.1%	68.1%	14,947	4,158	27.8%	27.8%	\$ 0.108	\$ 0.265
ENERGY STAR® HVAC	240	328	136.8%	4,620	6,310	136.6%	5,229	6,044	115.6%	\$ 4,684.4	\$ 4,299.2	91.8%	91.8%	77,717	110,361	142.0%	142.0%	\$ 0.060	\$ 0.039
EnergyWise	424	450	106.1%	2,789	2,650	95.0%	12,000	11,439	95.3%	\$ 15,557.0	\$ 14,355.9	92.3%	92.3%	13,472	12,661	94.0%	94.0%	\$ 1.155	\$ 1.134
EnergyWise Multifamily	143	114	80.1%	1,424	721	50.6%	3,600	2,052	57.0%	\$ 3,238.3	\$ 1,345.7	41.6%	41.6%	20,783	3,441	16.6%	16.6%	\$ 0.156	\$ 0.391
Residential Consumer Products	1,118	525	47.0%	6,885	2,437	35.4%	34,692	8,677	25.0%	\$ 2,796.0	\$ 1,952.5	69.8%	69.8%	47,554	17,380	36.5%	36.5%	\$ 0.059	\$ 0.112
Home Energy Reports	3,692	4,252	115.2%	26,852	30,920	115.2%	323,248	260,322	80.5%	\$ 2,639.1	\$ 2,389.6	90.5%	90.5%	26,852	30,920	115.2%	115.2%	\$ 0.098	\$ 0.077
Residential Connected Solutions										\$ 1,822.6	\$ 1,164.7	63.9%	63.9%						
Energy Efficiency Education Programs										\$ -	\$ 0.0	0.0%	0.0%						
Community Based Initiatives - Residential										\$ 255.1	\$ 0.0	0.0%	0.0%						
Comprehensive Marketing - Residential										\$ 247.9	\$ 264.9	106.9%	106.9%						
SUBTOTAL	5,691	5,718	100.5%	43,435	43,250	99.6%	379,231	288,965	76.2%	\$ 32,857.4	\$ 26,874.1	81.8%	81.8%	201,325	178,921	88.9%	88.9%	\$ 0.163	\$ 0.150
Regulatory																			
EERMC										\$ 766.2	\$ 605.9	79.1%	79.1%						
OER										\$ 1,541.7	\$ 1,581.4	102.6%	102.6%						
Rhode Island Infrastructure Bank										\$ 3,737.5	\$ 3,735.0	99.9%	99.9%						
SUBTOTAL										\$ 6,045.4	\$ 5,922.3	98.0%	98.0%						
TOTAL	17,359	14,623	84.2%	111,983	103,773	92.7%	389,239	297,957	76.5%	\$ 105,281.1	\$ 78,053.6	74.1%	74.1%	833,808	722,345	86.6%	86.6%	\$ 0.126	\$ 0.108
Municipal LED Street Lights										485.9	\$ 893.8	184.0%							

NOTES

- (1)(4)(7) Targets from Docket 5189 - Attachment 5, Table E-7 (electric), Refiled January 27, 2022.
 - (3) Pct Achieved is Column (2)/ Column (1).
 - (6) Pct Achieved is Column (5)/ Column (4).
 - (7) Participation was planned and is reported in 'net' terms which takes into account free-ridership and spillover.
 - (9) Pct Achieved is Column (8)/ Column (7).
 - (10) Approved Implementation Budget from Docket 5189, Attachment 5 Table E-3 (electric), Refiled January 27, 2022.
 - (11) Year To Date Expenses include Implementation expenses.
 - (12) Pct Achieved is Column (11)/ Column (10).
 - (16) Planned \$/lifetime MWh from Docket 5189 - Attachment 5, Table E-5 (electric), Refiled January 27, 2022 - adjusted to reflect format of quarterly report. Program Implementation Expenses/lifetime kWh.
 - (17) \$/lifetime kWh = Column (11)/Column (14)
 - (18) (19) For Q4 2022, Year End Spending and Energy Savings forecasts have been set equal to the latest published actual achievement values.
- Values in quarterly reports are preliminary and subject to change. Data is finalized in the Year-End Report.

RHODE ISLAND ENERGY EFFICIENCY PROGRAMS IN RHODE ISLAND
Table 2: Summary of Gas 2022 Target and Preliminary 4th Quarter Results

GAS PROGRAMS Sector and Program	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(16)	(10)	(11)	(12)	(17)	(13)	(14)	(15) Peak Hour Gas Demand Savings (MMBtu)
	Energy Savings (Annual MMBtu)			Customer Participation			Expenses (\$ 000)				Energy Savings (Lifetime MMBtu)				\$/Lifetime MMBtu		
	Target	Year To Date	Pct Achieved	Target	Year To Date	Pct Achieved	Budget	Year To Date	Pct Achieved	Year End Forecast		Planned	Year To Date	Pct Achieved	Year End Forecast	Planned	Year to Date
Commercial and Industrial																	
Large Commercial New Construction	52,956	43,557	82.3%	94	23	24.0%	\$ 3,140.9	\$ 2,595.4	82.6%	82.6%	788,763	570,255	72.3%	72.3%	\$ 3.98	\$ 4.55	21.78
Large Commercial Retrofit	142,888	146,383	102.4%	62	89	143.4%	\$ 4,672.1	\$ 4,859.5	104.0%	104.0%	1,332,508	1,374,881	103.2%	103.2%	\$ 3.51	\$ 3.53	73.19
Small Business Direct Install	6,113	4,287	70.1%	170	97	56.7%	\$ 354.1	\$ 414.8	117.2%	117.2%	91,700	78,711	85.8%	85.8%	\$ 3.86	\$ 5.27	2.14
Commercial & Industrial Multifamily	8,803	2,766	31.4%	729	159	21.8%	\$ 957.0	\$ 490.8	51.3%	51.3%	131,220	58,963	44.9%	44.9%	\$ 7.29	\$ 8.32	1.38
Commercial Pilots							\$ 215.8	\$ 67.2	31.1%	31.1%							
Community Based Initiatives - C&I							\$ 28.3	\$ 2.9	10.1%	10.1%							
Commercial Workforce Development							\$ 67.5	\$ -	0.0%	0.0%							
SUBTOTAL	210,760	196,993	93.5%	1,056	367	34.8%	\$ 9,435.7	\$ 8,430.5	89.3%	89.3%	2,344,192	2,082,809	88.8%	88.8%	\$ 4.03	\$ 4.05	98.50
Income Eligible Residential																	
Single Family - Income Eligible Services	10,942	6,481	59.2%	1,098	508	46.3%	\$ 6,370.0	\$ 4,238.4	66.5%	66.5%	218,847	129,628	59.2%	59.2%	\$ 29.11	\$ 32.70	3.24
Income Eligible Multifamily	14,700	8,795	59.8%	3,150	1,717	54.5%	\$ 2,947.5	\$ 3,086.5	104.7%	104.7%	273,085	217,169	79.5%	79.5%	\$ 10.79	\$ 14.21	4.40
SUBTOTAL	25,642	15,277	59.6%	4,248	2,225	52.4%	\$ 9,317.6	\$ 7,324.9	78.6%	78.6%	491,932	346,797	70.5%	70.5%	\$ 18.94	\$ 21.12	7.64
Non-Income Eligible Residential																	
EnergyWise	20,850	22,383	107.4%	1,761	3,548	201.5%	\$ 8,575.0	\$ 8,775.0	102.3%	102.3%	478,550	526,242	110.0%	110.0%	\$ 17.92	\$ 16.67	11.19
Energy Star® HVAC	26,740	23,534	88.0%	3,062	2,540	83.0%	\$ 3,650.5	\$ 2,470.7	67.7%	67.7%	439,717	380,427	86.5%	86.5%	\$ 8.30	\$ 6.49	11.77
EnergyWise Multifamily	8,279	2,300	27.8%	4,000	174	4.4%	\$ 1,488.6	\$ 585.3	39.3%	39.3%	147,064	51,314	34.9%	34.9%	\$ 10.12	\$ 11.41	1.15
Home Energy Reports	93,548	115,053	123.0%	152,324	143,487	94.2%	\$ 441.5	\$ 379.4	85.9%	85.9%	93,548	115,053	123.0%	123.0%	\$ 4.72	\$ 3.30	57.53
Residential New Construction	3,610	3,257	90.2%	289	282	97.4%	\$ 566.4	\$ 576.5	101.8%	101.8%	64,899	81,410	125.4%	125.4%	\$ 8.73	\$ 7.08	1.63
Comprehensive Marketing - Residential							\$ 68.0	\$ 84.9	124.8%	124.8%							
Community Based Initiatives - Residential							\$ 85.0	\$ 0.0	0.0%	0.0%							
SUBTOTAL	153,027	166,526	108.8%	161,436	150,032	92.9%	\$ 14,875.0	\$ 12,871.9	86.5%	86.5%	1,223,778	1,154,446	94.3%	94.3%	\$ 12.16	\$ 11.15	83.26
Regulatory																	
EERMC							\$ 259.5	\$ 205.2	79.1%	79.1%							
OER							\$ 755.6	\$ 715.9	94.7%	94.7%							
Rhode Island Infrastructure Bank							\$ 1,262.5	\$ 1,265.0	100.2%	100.2%							
SUBTOTAL							\$ 2,277.6	\$ 2,186.1	96.0%	96.0%							
TOTAL	389,430	378,796	97.3%	166,740	152,624	91.5%	\$ 35,906.0	\$ 30,813.4	85.8%	85.8%	4,059,902	3,584,052	88.3%	88.3%	\$ 8.84	\$ 8.60	189.40

NOTES

- (1)(4) Targets from Docket 5189 - Attachment 6, Table G-7 (gas), Refiled January 27, 2022.
 - (3) Pct Achieved is Column (2)/ Column (1).
 - (4) Participation was planned and is reported in 'net' terms which takes into account free-ridership and spillover.
 - (6) Pct Achieved is Column (5)/ Column (4).
 - (7) Approved Implementation Budget from Docket 5189, Attachment 6 Table G-3 (gas), Refiled January 27, 2022.
 - (8) Year To Date Expenses include Implementation expenses.
 - (9) Pct Achieved is Column (8)/ Column (7).
 - (13) Planned \$/lifetime MMBtu from Docket 5189 - Attachment 6, Table G-5 (gas), Refiled January 27, 2022 - adjusted to reflect format of quarterly report. Program Implementation Expenses/lifetime MMBtu.
 - (14) \$/lifetime MMBtu = Column (8)*1000/Column (11)
 - (15) Peak Hour Gas Demand Savings is a test metric in 2022 and represents a rough approximation of peak-hour gas demand impacts. Column(2) *0.01 *0.05
 - (16) (17) For Q4 2022, Year End Spending and Energy Savings forecasts have been set equal to the latest published actual achievement values.
- Values in quarterly reports are preliminary and subject to change. Data is finalized in the Year-End Report.

RHODE ISLAND ENERGY ELECTRIC ENERGY EFFICIENCY PROGRAMS IN RHODE ISLAND
Table 3: Rhode Island Energy 2022 Revolving Loan Funds

Large C&I Electric Revolving Loan Fund

Small Business Electric Revolving Loan Fund

<u>Income Statement</u>			<u>Income Statement</u>		
(1)	2022 Funds Available	\$5,202,855	(1)	2022 Funds Available	\$3,137,538
(2)	2022 Loan budget	\$12,000,000	(2)	2022 Loan budget	\$1,500,000
(3)	Committed	\$3,282,694	(3)	Committed	\$155,697
(4)	Paid	\$2,990,194	(4)	Paid	\$989,306
(5)	Repayments	\$6,336,240	(5)	Repayments	\$913,083
(6)	Available 12/31/22	\$5,266,208	(6)	Available 12/31/22	\$2,905,618
(7)	Outstanding loan volume	\$14,086,173	(7)	Outstanding loan volume	\$576,673
(8)	Loan defaults during period (\$)	\$0	(8)	Loan defaults during period (\$)	\$0
(9)	Arrears over 120 days at period end (\$)	\$88,147	(9)	Arrears over 120 days at period end (\$)	\$13,258
<u>Program Impact</u>			<u>Program Impact</u>		
(10)	Number of loans	67	(10b)	Participants	555
(10b)	Participants	60	(11)	Annual Savings (Gross MWh)	7,686
(11)	Annual Savings (Gross MWh)	6,252	(12)	Annual Savings (Net MWh)	6,944
(12)	Annual Savings (Net MWh)	4,912	(13)	Lifetime Savings (Gross MWh)	62,162
(13)	Lifetime Savings (Gross MWh)	46,245	(14)	Lifetime Savings (Net MWh)	57,025
(14)	Lifetime Savings (Net MWh)	35,249	(15)	Annual Savings (Gross kW)	1,490
(15)	Annual Savings (Gross kW)	1,222	(16)	Annual Saving (Net kW)	1,213
(16)	Annual Saving (Net kW)	571	(17)	Total associated incentive volume (\$)	\$5,138,415
(17)	Total associated incentive volume (\$)	\$1,858,524	(18)	Total annual estimated energy cost savings (\$)	\$1,229,017
(18)	Total annual estimated energy cost savings (\$)	\$869,507			

Rhode Island Public Energy Partnership (RI PEP)

<u>Income Statement</u>		
(1)	2022 Funds Available	\$46,895
(2)	2022 Loan budget	\$0
(3)	Committed	\$0
(4)	Paid	\$0
(4a)	Funds Returned to OER	\$0
(5)	Repayments	\$7,267
(6)	Available 12/31/22	\$54,162
(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, 2022. Includes line (6) "Available 12/31/21" plus line (3) "Committed" in Table E-6 and G-6 of the 2021 Year End Report.
 - 2 Budget adopted by Sales Team for 2022 operations. Budget includes projections of repayments made during 2022.
 - 3 As of December 31, 2022. Includes jobs paid in December that are not yet reflected in the loan fund balance, plus commitments for 2023.
 - 4 As of November 30, 2022. This includes all projects paid through November 30, 2022 and the OBR associated with those projects. OBR payment are processed once the associated incentive has been paid, usually in batches.
 - 4a Funds returned to RI OER.
 - 5 As of November 30, 2022. This includes all projects paid through November 30, 2022 and the OBR associated with those projects. OBR payments are processed once the associated incentive has been paid, usually in batches.
 - 6 Fund balance as of November 30, 2022. 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 November 30, 2022.
 - 10 As of November 30, 2022
 - 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 business (not adjusted for net-to-gross).
 - 11 As of November 30, 2022
 - 12 As of November 30, 2022
 - 13 As of November 30, 2022
 - 14 As of November 30, 2022
 - 15 As of November 30, 2022
 - 16 As of November 30, 2022
 - 17 Incentives paid out with loans.
 - 18 Estimated energy cost savings to loan fund participants.
- Loan fund balance data available at the time of this report was only current through November 30, 2022. Full 2022 numbers will be provided in the Year-End Report. Values in quarterly reports are preliminary and subject to change. Data is finalized in the Year-End Report.

RHODE ISLAND ENERGY GAS ENERGY EFFICIENCY PROGRAMS IN RHODE ISLAND
Table 4: Rhode Island Energy 2022 Revolving Loan Funds

Large C&I Gas Revolving Loan Fund

<u>Income Statement</u>		
(1)	2022 Funds Available	\$1,035,330
(2)	2022 Loan budget	\$2,000,000
(3)	Committed	\$335,100
(4)	Paid	\$865,986
(5)	Repayments	\$608,485
(6)	<u>Available 12/31/22</u>	<u>\$442,729</u>
(7)	Outstanding loan volume	\$1,553,098
(8)	Loan defaults during period (\$)	\$0
(9)	Arrears over 120 days at period end (\$)	\$11,882
<u>Program Impact</u>		
(10)	Number of loans	38
(10b)	Participants	27
(11)	Annual Savings (Gross MMBtu)	38,951
(12)	Annual Savings (Net MMBtu)	35,922
(13)	Lifetime Savings (Gross MMBtu)	471,928
(14)	Lifetime Savings (Net MMBtu)	441,629
(15)	Total associated incentive volume (\$)	\$1,888,505
(16)	Total annual estimated energy cost savings (\$)	\$736,536

Notes

- 1 Amount available as of January 1, 2022. Includes line (6) "Available 12/31/21" plus line (3) "Committed" in Table E-6 and G-6 of the 2021 Year End Report.
- 2 Budget adopted by Sales Team for 2022 operations. Budget includes projections of repayments made during 2022.
- 3 As of December 31, 2022. Includes jobs paid in December that are not yet reflected in the loan fund balance, plus commitments for 2023.
- 4 As of November 30, 2022. This includes all project paid through November 30, 2022 and the OBR associated with those projects. OBR payment are processed once the associated incentive has been paid usually in batches.
- 5 As of November 30, 2022
- 6 Fund balance as of November 30, 2022. 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 November 30, 2022.
- 10 As of November 30, 2022
- 10b Unique customer names for large business (one customer name can have multiple sub accounts as is in the case of a franchise).
- 11 As of November 30, 2022
- 12 As of November 30, 2022
- 13 As of November 30, 2022
- 14 As of November 30, 2022
- 15 Incentives paid out with loans.
- 16 Estimated energy cost savings to loan fund participants.
 Loan fund balance data available at the time of this report was only current through November 30, 2022. Full 2022 numbers will be provided in the Year-End Report.
 Values in quarterly reports are preliminary and subject to change. Data is finalized in the Year-End Report.

**Table 5
Rhode Island Energy
2022 Test Metrics**

Carbon Reduction¹

	CO2 (Electricity)	CO2 (Natural Gas)	CO2 (Oil)	CO2 (Propane)	CO2 (Total)
Residential	16,522	9,742	18,701	15,603	60,568
Income Eligible	1,448	894	493	23	2,857
C&I	21,672	11,524	(1,064)	-	32,132
Total	39,641	22,160	18,130	15,626	95,557

NOTES

¹ Carbon emissions values are from AESC 2021, Appendix G Table 159.

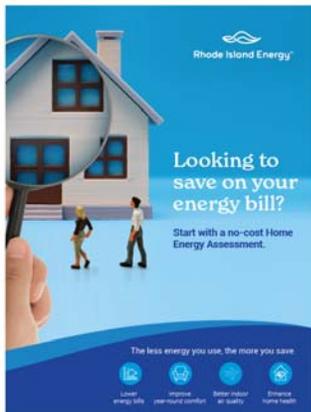
Values in quarterly reports are preliminary and subject to change. Data is finalized in the Year-End Report.

Attachment 1 – Rhode Island Energy Efficiency Fourth Quarter Equity Update

Rhode Island Energy Efficiency – Equity Update

Fourth Quarter Equity Update
2/7/2023

- 1.1 All Residential and Income Eligible (IE) email and direct mail will more consistently be translated into both English and Spanish.
- 1.1 A New Flyer for EE Outreach with a focus on the home energy assessments and more in-depth information on how to identify which program customers qualify for as well as clear direction on where & how to participate has been created in English, Spanish and Portuguese.



What is a Home Energy Assessment?
A Home Energy Assessment from Rhode Island Energy is a complimentary orientation of your home by an Energy Specialist to identify where you may be losing energy. Your Energy Specialist will explain steps to save energy and money and improve the health and comfort of your home.

What program do you qualify for?

- Residential EnergyWise Program**
For residential residential customers (homeowners, renters and landlords) who live in a one- to four-unit building with a Rhode Island Energy gas and/or electric account.
- Multifamily Program**
Rhode Island apartment buildings and condominium complexes with Renewable Energy qualify for the Multifamily Program.

Income-Eligible Program

Enhanced offers are available for discount rate customers (Discount Rate and Smart) living in a one- to four-unit building with a Rhode Island Energy gas and/or electric account.

Income-Eligible Program

Household Size	Annual Household Income
1 person	\$14,000 or less
2 people	\$18,912 or less
3 people	\$23,824 or less
4 people	\$28,736 or less
5 people	\$33,648 or less
6 people	\$38,560 or less
7 people	\$43,472 or less
8 people	\$48,384 or less

Are you enrolled in the Home Energy Assistance Program (HEAP)?

Community Action Programs (CAP)

Wachusett Valley Community Action Program
Serving Orange Falls, Cumberland, Lincoln and Peachcroft.

East Bay Community Action Program
Serving Jamestown, Littleton, Middleboro, New Bedford, Taunton, Wareham, Ware, East Providence and Warren.



¿Qué es una evaluación de energía?

Programa Multifamiliar

Programa de tarifas especiales para clientes de tarifa reducida



¿Está buscando ahorrar en su factura de energía?

Programa multifamiliar

Programa de tarifas especiais para clientes de tarifa reduzida

1.1.b. Sample emails that have been sent out this year on behalf of the CAPS for customers on



Rhode Island Energy Efficiency – Equity Update

the income eligible rate and a market rate home energy assessment email.



Rhode Island Energy™

a PPL company



Savings start with a no-cost home energy assessment.

*Haz click aquí para leer este mensaje en español
Clique aqui para ler esta mensagem em português*

We know that a safe, comfortable, healthy, affordable home is important to you. A no-cost home energy assessment can help you save energy and money. Because after all, using less energy is good for you, and our environment.

As a thank you for completing the assessment, you will receive no-cost energy savings products such as:

- LED light bulbs
- Low-flow showerheads
- Faucet aerators

Plus, potential no-cost upgrades installed at follow-up appointments could include:

- Home insulation
 - Air sealing of leaks
 - Weather stripping
 - Heating system replacement
-



Rhode Island Energy Efficiency – Equity Update

- Refrigerator or freezer replacement
- Dehumidifier replacement
- Clothes washer replacement
- Window air conditioner replacement

To schedule your no-cost Home Energy Assessment, please call Eastbay Community Action Program at 1-401-437-1000.

[Visit our website](#)

Rhode Island Energy



This program is designed for income-eligible Rhode Island one- to four-unit homes. If you live in a building with five or more units in which at least half of the residents meet income-eligibility requirements, you may be eligible to be served by our multifamily program. Please have your landlord or condo association call 1-888-633-7947 to learn more. These programs are funded by the energy-efficiency charge on all customers' gas and electric bills, in accordance with Rhode Island law.

1.1.c Mailing to Income Eligible Customers



Rhode Island Energy Efficiency – Equity Update



100% no-cost energy upgrades for you.

Dear Valued Customer,

As a Rhode Island Energy customer on our discount rate, there are a number of no-cost energy efficiency upgrades you can take advantage of to increase comfort and reduce energy cost. The process is easy and we'll take care of the details. One of our Energy Operators will assess your home and tell you about the upgrades you are qualified to receive. As a thank you for completing the assessment, you may receive products such as LED light bulbs, thermostat, fan, new thermostat and smart or programmable thermostats.

100% no-cost upgrades installed at follow-up appointments could include:

- smart thermostat
- air sealing of leaks
- weather stripping
- A new high-efficiency heating system – such as an electric heat pump or a gas furnace or boiler
- Replacement of inefficient appliances such as refrigerators, dishwashers, clothes washers, freezers and window air conditioners

To schedule your Home Energy Assessment, call **Just Stay Community Action Program** at 1-401-437-1000 extension 1135.



Actualizaciones de energía 100% sin costo para usted.

Estimado cliente valioso,

Como cliente con tarifa de descuento de Rhode Island Energy, usted tiene disponible una serie de actualizaciones de eficiencia energética sin costo que puede aprovechar para aumentar la comodidad y reducir el uso de energía.

El proceso es fácil. Seremos para solicitar una evaluación de energía de su hogar sin costo. Uno de nuestros especialistas en energía evaluará su hogar y le informará las actualizaciones que puede recibir.

Como agradecimiento por completar la evaluación, puede recibir productos como bombillas de luz LED, termostatos de grado, cables de clima de bajo flujo y termostatos inteligentes y programables.

Las actualizaciones 100% gratuitas instaladas en las citas de seguimiento pueden incluir los siguientes:

- Reemplazo del termostato
- Sellado de fugas de aire
- Bombas
- Un nuevo sistema de calefacción de alta eficiencia, como una bomba de calor eléctrica o un horno o calentador de gas
- Reemplazo de electrodomésticos ineficientes, como refrigeradores, lavadoras, lavavajillas, secadoras de ropa, computadoras y acondicionadores de aire de ventana

Para programar tu evaluación de energía del hogar, llame a **PROGRAMA ACCIÓN** al 7-401-437-1000 extensión 1135.



Actualizações de energia a 100% sem custos para si.

Estimado Cliente,

Como cliente de Rhode Island Energy que recibe un precio base de descuento, ha una serie de mejoras de eficiencia energética sin costo que puede aprovechar para aumentar su confort y reducir el consumo de energía.

El proceso es fácil. Seremos para solicitar una Evaluación de Energía Doméstica sin costo. Uno de nuestros especialistas en Energía evaluará a su casa e informará lo que usted es elegible para recibir.

Puede recibir productos como, agregamiento por completar la evaluación, los como bombillas LED, termostatos de grado, bombas de flujo bajo y termostatos inteligentes y programables.

Las actualizaciones 100% sin costo instaladas en las citas de seguimiento pueden incluir:

- Reemplazo de termostato
- Sellado de fugas de aire
- Bombas
- Un nuevo sistema de calefacción de alta eficiencia, como una bomba de calor eléctrica, un horno o un calentador de gas
- Reemplazo de electrodomésticos ineficientes, como refrigeradores, lavadoras, lavavajillas, secadoras de ropa, computadoras y aparatos de aire acondicionado para ventanas

Para marcar a tu Avaliação Energética Doméstica, ligue para **PROGRAMA ACCÃO** al 7-401-437-1000 extensão 1135.



An energy-efficient home is a healthier, more comfortable home.



Rhode Island Energy™
a PPL company

Rhode Island Energy Efficiency – Equity Update



[Haga click aquí para leer este mensaie en español](#)
[Clique aqui para ler esta mensagem em português](#)

Hey Providence, save 50% or more off approved insulation and air sealing up to \$4,000.

It all starts with a no-cost in-person [Home Energy Assessment](#). Our Energy Specialists will show you how to reduce energy usage and save money. Plus, get direct access to generous rebates on qualifying energy-efficient heating, cooling and water-heating equipment. You can even apply for 0% financing.

Join thousands of your Rhode Island neighbors already seeing the savings, comfort and convenience that start with a no-cost Home Energy Assessment:



Rhode Island Energy Efficiency – Equity Update

In-person assessment

Lower energy usage
year after year



Keep drafts, pollen
and dust out



Lessen your
environmental impact

Schedule your in-person Home Energy Assessment.

Schedule today

or

Call 1-888-633-7947



Follow us!



- Home Energy Assessment Email: 50.3% open rate
 - Home Energy Assessment: 105 customers clicked to read in Spanish or Portuguese, which is 0.52% of customers who opened the e-mail
- Income Eligible Energy Efficiency Email: 47.3% open rate
 - Income Eligible EE: 8 customers clicked to read in Spanish or Portuguese, which is 0.45% of customers who opened the e-mail

Rhode Island Energy Efficiency – Equity Update

2.1 Provide additional energy efficiency program training to the Company's existing Customer Advocates so they can more effectively speak to the benefits of the programs.

Completed & ongoing. Existing consumer advocates were provided with more information and training on energy efficiency offerings. As the company continues to hire new advocates this training will continue.

2.2 Hire an additional Customer Advocate that will focus on promoting the energy efficiency programs. The new Customer Advocate will have community organizing experience and will be multi-lingual. The Advocate will deliver energy efficiency program information at community centers, faith-based organizations, multi-family housing, and other community gathering places. The Customer Advocate will leverage the expertise of existing community organizations that serve diverse households. The new hire will occur by mid-2022, before summer events begin.

Completed. Welcomed Valerie Chase, our new Energy Efficiency Customer Advocate. Valerie joins us from the Jurisdiction team where she oversaw the Community Giving Program and worked with organizations such as the Good Neighbor Energy Fund.

3.1 Provide vendor call centers with scripts to help answer any customer/landlord inquiries on this subject. Following is the messaging provided to intake for single family and multifamily scheduling of EnergyWise.

The role of the energy efficiency program vendor is to both educate and inform on qualitative efficiency measure opportunities. If conditions are safe, operable, and habitable for the customer, energy efficiency recommendations can be shared with the respective party. The energy efficiency program vendor should not be recommending any suggestions with respect to code violations they may encounter outside of severe safety concerns while in the customer's home as they are not trained, nor qualified to enforce code.

3.2 Consider adding the language to landlord outreach, as appropriate.

Rhode Island Energy Efficiency – Equity Update

Consideration taken, but the Company is not yet comfortable with putting this understanding in print to landlords.

4. Develop age-appropriate marketing strategies to connect with various age groups that live in a household such as utilizing social media, apps, and text.

Following is a sampling of social media postings for energy efficiency. The spirit of the EWG was to ensure that the Company would reach a younger demographic that may not be reading bill inserts and paper mailings.

Published by Jessica Rosato · Jun 11, 2022 at 12:30 PM



RIE Facebook

Jun 11

RIE Facebook · Update

Running a fan takes a lot less energy than an air conditioner. When using them together, you can set your AC's thermostat slightly higher, while you save energy and stay cool. 😊

More info on #EnergySavings:

<https://www.rienergy.com/RI-Home/Energy-Saving-Programs/rebate-programs>



👍 2 💬 2 ↻ 0 🌐 403 🔄 1

Rhode Island Energy Efficiency – Equity Update

Published by Jessica Rosato · Jun 29, 2022 at 10:20 AM



RIE Facebook

Jun 29

RIE Facebook · Update

Save energy and money with our no-cost Home Energy Assessment.

<https://www.rienergy.com/RI-Home/Energy-Saving-Programs/Home-Energy-Assessments>

#SaveEnergy #EnergyEfficiency



3 0 0 233 1.3

Published by Jessica Rosato · Jul 5, 2022 at 2:45 PM



RIE Facebook

Jul 05

RIE Facebook · Update

Use a smart thermostat to regulate your energy while you're away and still come back to a cool home. Check out our online marketplace for rebates:

<https://www.rienergy.com/RI-Home/Energy-Saving-Programs/rebate-programs>



2 0 0 235 0.9



Rhode Island Energy Efficiency – Equity Update

Published by Jessica Rosato · Jul 6, 2022 at 7:15 PM



RIE Facebook

Jul 06

RIE Facebook · Update

With inflation on the rise, everyone is looking for [#WaysToSave](#). The good news is- you're in control. Here are a few things you can do to save energy & money:

- 💡 Turn off the lights
- 🎮 Unplug small appliances and gaming consoles when they're not in use
- 🔥 Fire up the grill instead of heating the oven
- 📄 Track your energy use at RIEnergy.com
- ✅ Make a plan to save



👍 3 💬 0 ➦ 0 🌐 267 🔄 1.1

Rhode Island Energy Efficiency – Equity Update

Published by Jessica Rosato · Jul 11, 2022 at 12:30 PM



RIE Facebook

Jul 11

RIE Facebook · Update

ENERGY STAR® certified room air conditioners use 10% less energy on average, and cost less than \$75/year to run. Best yet- if you're in the market for a new one, we offer a \$40 instant rebate.

Check it out:

<https://www.rienergy.com/RI-Home/Energy-Saving-Programs/rebate-programs>



👍 1 💬 0 ➦ 0 🌐 269 🔄 0.4

Published by Jessica Rosato · Jul 13, 2022 at 3:10 PM



RIE Facebook

Jul 13

RIE Facebook · Update

#DYK? Ever wonder why your energy use increases if you're not changing the temperature on your thermostat? Even if your thermostat is constantly set to 68 degrees, when the temperature outside rises, your system is using more energy to bring the indoor temp to that cool 68.



👍 1 💬 0 ➦ 0 🌐 270 🔄 0.4



Rhode Island Energy Efficiency – Equity Update

Published by Jessica Rosato · Jul 16, 2022 at 12:35 PM



RIE Facebook

Jul 16

RIE Facebook · Update

Hotter temps are here, so what better time to upgrade your pool equipment? Find an **ENERGY STAR** certified pump and dive into savings.
<https://www.rienergy.com/RI-Home/Energy-Saving-Programs/rebate-programs>

#EnergySavings #SaveEnergy #SaveMoney



👍 1 💬 0 ↻ 0 🌐 259 🔄 0.4

Published by Jessica Rosato · Jul 26, 2022 at 10:15 AM



RIE Facebook

23d

RIE Facebook · Update

Save energy and money by making your home more efficient. Check out our low and no-cost ways to save.

<https://www.rienergy.com/RI-Home/Energy-Saving-Tips/Top-20-Tips>



👍 0 💬 5 ↻ 0 🌐 262 🔄 1.9



Rhode Island Energy Efficiency – Equity Update

Published by Jessica Rosato · Aug 1, 2022 at 4:15 PM



RIE Facebook

16d

RIE Facebook · Update

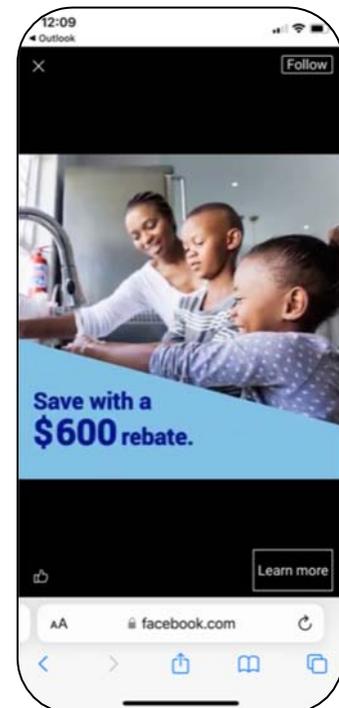
Smart power strips can help you control the amount of energy your electronics use and keep your at-home workspace nice and tidy. More tips:

<https://www.rienergy.com/RI-Home/Energy-Saving-Tips/>

#EnergySavings #SaveEnergy #SaveMoney



1 0 0 206 0.5





Rhode Island Energy Efficiency – Equity Update



 Rhode Island Energy

We all want to save energy at home. In our all-new Marketplace, you can conserve and stay comfortable all summer long. Shop Advanced Power Strips today!

Save energy like a pro.



Power strip offers from \$6

Welcome to our all-new Marketplace.

 Rhode Island Energy

Shop energy-saving products on our all-new Marketplace experience, for a more efficient home today.



Shop the all-new Marketplace.

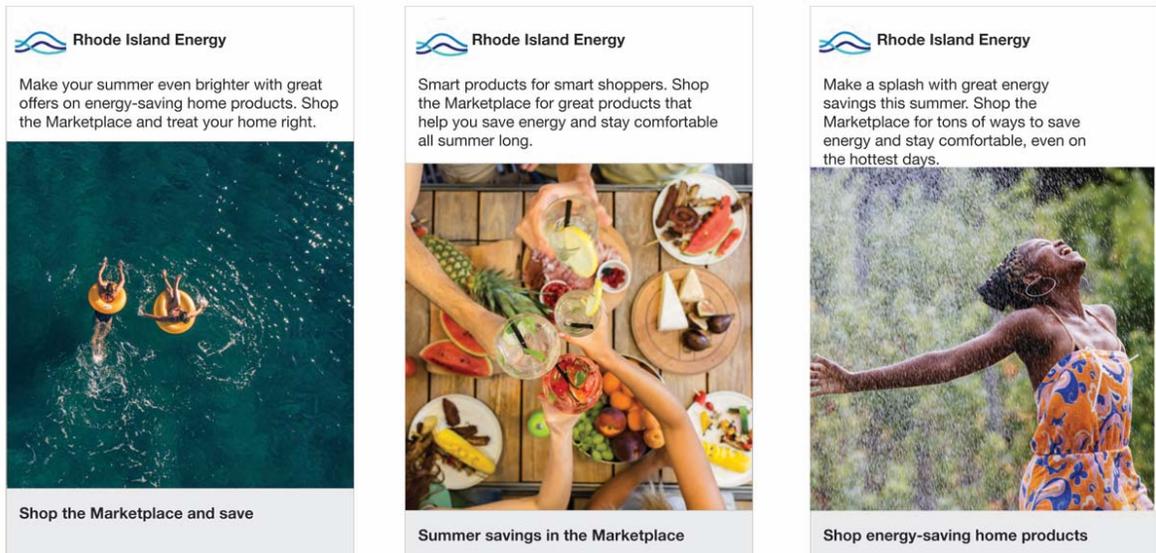
 Rhode Island Energy

An all-new Marketplace. All the products you need for a more efficient home. Shop products that help you save energy every day.



We've set up a new shop for you.

Rhode Island Energy Efficiency – Equity Update



5. By March 2022, establish a working group to explore how to more comprehensively leverage other home visiting programs for energy efficiency outreach and education. The working group will be facilitated by the Company and will include home visiting program representatives. The working group will make related recommendations for the 2023 Annual Energy Efficiency Plan.

The Equity Working Group stood up an Outreach and Engagement Subgroup. Following are the recommendations from this team of active stakeholders along with the commitments and metrics included by the company in the 2023 EE plan.

Recommendation 1: Promote energy efficiency at community gathering places and events	
Actions	Metrics
<ul style="list-style-type: none"> EE consumer advocate will frequent community gathering places for face-to-face interactions with customers and will also 	<p>Metric 1: Number of events hosted/attended by all consumer advocates (focus on underserved communities)</p>



Rhode Island Energy Efficiency – Equity Update

<ul style="list-style-type: none"> provide organizations with EE materials that can be distributed to customers All consumer advocates will be well versed in RIE’s EE program offerings so that they can also help promote the program and educate customers on the benefits of EE while they are out in the community Connect and coordinate with the City of Providence on the city’s efforts to develop Resilience Hubs throughout the city 	<p>Metric 2: Number of customers reached at events</p> <p>Metric 3: % of marketing & education interactions with customers broken down by customer group</p> <p>Metric 4: Number of coordinated events with the City of Providence at their Resilience Hubs</p>
<p>Recommendation 2: Provide enhanced outreach, promotion, and education of all energy efficiency offerings in underserved communities</p>	
Actions	Metrics
<ul style="list-style-type: none"> Rhode Island Energy will conduct enhanced outreach in 5 communities (Providence, East Providence, Pawtucket, Woonsocket, and Central Falls) with less than average participation and higher percentages of minority and renter populations Enhanced outreach includes a greater number of events and office hours hosted/attended in these areas and a focus on partnering with community organizations working within these areas with underserved customers Analyzing year-end spending on marketing and outreach to communities can ensure RIE can appropriately market programs to targeted communities to increase participation 	<p>Metric 1: Increase participation in targeted communities (reported quarterly by zip code and by program)</p> <p>Metric 2: Increase participation in programs disaggregated by all customer groups</p> <p>Metric 3: % of marketing & education interactions with customers broken down by customer group (e.g. number of requested translations, number of resources available in other languages – Portuguese, Creole, Hmong, etc.)</p> <p>Metric 4: Track year-end spending by zip code on investments in marketing material and outreach</p>

Rhode Island Energy Efficiency – Equity Update

Recommendation 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:	
Actions	Metrics
<ul style="list-style-type: none"> Establish and build relationships with community partners to better understand the needs of our customers and leverage their earned reputation as a trusted resource Provide energy efficiency training and collateral for community organizations, home visiting programs, state/municipal agencies, etc. 	Metric 1: Number of community partnerships established & organizations reached
	Metric 2: Number of trainings completed
	Metric 3: Number of referrals from community organizations (this could be expanded to include referral traffic to Rhode Island Energy’s website as well as to the RISE and CLEAResult sites)
	Metric 4: Development of a guiding resource for agencies and advocates to cross-train and support current and future staff

6.1. Continue to support municipality efforts to promote energy efficiency through the Community Initiative.

RIE is working with East Providence on a Community Initiative. The primary focus of East Providence is on Small Business and a main streets campaign will be run to meet that requested need. Residential will provide information that can be distributed with small businesses within East Providence and will also coordinate at customer facing events such as the Chamber of Commerce Touch a Truck event on 9/24/2022. RIE is also working to connect with the department of constituent affairs within the city to explore additional opportunities to reach residents.

7. The Company will expand collateral for more community groups that serve vulnerable populations.

Rhode Island Energy Efficiency – Equity Update

The company has created new energy efficiency flyers (see item 1.2) that have been translated into both Portuguese and Spanish and will be shared with community groups. The company is currently awaiting the new flyers to be delivered so distribution may begin. Flyers will be distributed to libraries, senior centers, community centers, etc.

8. Expand follow-up outreach for customers who receive a recommendation from the on-line home energy assessment, in-home/virtual home energy assessment, and/or home energy reports.

In the Q2 report, the response cited that follow-up outreach was completed for in-home and virtual assessments. Below is a sample follow-up email for those two pathways

Say YES to your insulation incentives!

Receive 50% or more off your insulation expense

Hi Susan

Thank you for taking the first step by participating in your home energy assessment. Now it's time to take the next step by completing the insulation recommendations we discussed.

Your offer is ready for you to review by clicking the button below. If you decide you'd like to move forward, simply sign.

[Review & Sign Your Insulation Contract](#)



Rhode Island Energy Efficiency – Equity Update

You Could Qualify for No-Cost Insulation

If your annual household income falls within the ranges listed below, you may qualify for an enhanced offer of **100% Incentivized Weatherization**.

Household Size	Pre-Tax Annual Household Income	Household Size	Pre-Tax Annual Household Income
1 person	\$33,646 - \$44,860	7 people	\$87,349 - \$116,464
2 people	\$43,998 - \$58,663	8 people	\$89,290 - \$119,052
3 people	\$54,351 - \$72,467	9 people	\$91,231 - \$121,640
4 people	\$64,703 - \$86,269	10 people	\$93,172 - \$124,228
5 people	\$85,408 - \$113,876	11 people	\$95,113 - \$126,816
6 people	\$87,349 - \$116,464	12 people	\$97,054 - \$129,404

[Apply for Enhanced Offer](#)

Weatherization Barriers

In addition, check out the **Special Incentives** linked below to help you address any barriers to installing the weatherization work. These are noted on your insulation contract.

[Special Barrier Incentives](#)



Rhode Island Energy™

a PPL company

Rhode Island Energy Efficiency – Equity Update

If you have any questions or would like to discuss your efficiency projects, please contact me or reply to this email.

For your convenience, your client number is #123456

Thank you in advance for your reply,

Eileen Barrett

Energy Specialist | RISE

ebarrett@RISEngineering.com

401-290-8444

The online assessment was noted as being a manual process.

A follow up email and postcard was sent to customers identified as good candidates for a heating or water heating upgrade, based on online home energy assessment and in-person home energy assessment data. The e-mail is shown below:



Rhode Island Energy Efficiency – Equity Update



Rhode Island Energy™
a PPL company

We all love our little creature comforts.



[Haga click aquí para leer este mensaje en español](#)
[Clique aqui para ler esta mensagem em português](#)

Big rebates to help make your home more comfortable and energy efficient.

If your gas boiler, furnace or water heater needs replacing soon, now is the perfect time to upgrade with generous rebates from Rhode Island Energy. After your licensed heating contractor or plumber completes the installation, you may qualify for one of the following rebates:

Bring your costs down with qualifying high-efficiency:



Combination Boiler-Water Heaters
Get up to \$1,200 rebate



Boilers
Get up to \$800 rebate



Water Heaters
Get up to \$600 rebate



Furnaces
Get up to \$500 rebate

[Apply now](#)

Rebates are available on qualifying equipment to Rhode Island Energy residential gas customers through 12/31/22. Rebate applications must be submitted within 90 days of completion of work and by 1/31/23. These programs are funded by the energy efficiency charge on all customers' gas and electric bills, in accordance with Rhode Island law.

Follow us!





Rhode Island Energy Efficiency – Equity Update

The postcard is shown below:



Replace your aging heating and water heating equipment with high-efficiency models.

If your gas boiler, furnace or water heater needs replacing soon, now is the perfect time to upgrade. Rhode Island Energy offers rebates of up to \$1,200.



We can help make your home more comfortable and energy efficient.

We can help you with rebates that will bring your costs down and efficiency up:

Combination Boiler-Water Heaters	Boilers	High-Efficiency Water Heaters	Furnaces
Get up to \$1,200 rebate	Get up to \$800 rebate	Get up to \$600 rebate	Get up to \$500 rebate

Once your licensed heating contractor or plumber installs the qualifying energy efficient equipment you can apply for a rebate online or through our mail-in rebate form.

To learn more, visit rienergy.com/riheat or call 1-800-292-2032.

Rebates are available on qualifying equipment to Rhode Island Energy residential gas customers through 12/31/22. Rebate applications must be submitted within 90 days of completion of work and by 1/31/23. Visit rienergy.com/riheat. These programs are funded by the energy-efficiency charge on all customers' gas and electric bills, in accordance with Rhode Island law.



280 Melrose Street
Providence, RI 02907-2152

Presort First Class
U.S. Postage Paid
N. Reading, MA
Permit #211

Rhode Island Energy Efficiency – Equity Update

9. Benchmark Energy Efficiency Program participation data for race, geography, socioeconomic status, language, age of home, age of owner, age of renter, heating fuel type, type and age of heating /hot water/cooling systems.

9. 1. Completion of the Participant, Nonparticipant, and MF Census studies. Yes

9. 2. Presentation of report results at a public meeting, such as the Energy Efficiency Resource Management Council (EERMC). Presented at EWG and EERMC.

9. 3. Creation of a regular, zip code level participation report by Q2 2022 to target outreach for the EnergyWise, MF, and Income Eligible Single-Family programs. Following is the EnergyWise information.

Municipality	2022 EnergyWise Number of Home Energy Assessments
Albion	1
Arcadia	1
Ashaway	11
Barrington	82
Bradford	9
Bristol	68
Burrillville	9
Carolina	4
Centerdale	1
Central Falls	23
Charlestown	22
Chepachet	17
Clayville	3
Coventry	103
Cranston	292
Cumberland	132
East Greenwich	87
East Providence	54
Esmond	17
Exeter	12
Forestdale	2
Foster	11
Glendale	5



Rhode Island Energy Efficiency – Equity Update

Glocester	18
Greene	3
Greeneville	1
Greenville	29
Harmony	2
Hope	16
Hope Valley	9
Hopkinton	6
Jamestown	37
Johnston	116
Kenyon	1
Kingston	3
L Compton	6
Lincoln	80
Little Compton	1
Manville	11
Mapleville	4
Middletown	46
Misquamicut	2
Narragansett	79
Newport	77
North Kingstown	124
North Providence	91
North Scituate	19
North Smithfield	42
Pawtucket	201
Peace Dale	8
Portsmouth	75
Providence	462
Prudence Island	1
Quonset	1
Richmond	3
Riverside	71
Rumford	36
Saunderstown	24
Scituate	12
Shannock	2
Slatersville	11
Slocum	1
Smithfield	11
South Kingstown	5



Rhode Island Energy Efficiency – Equity Update

Tiverton	73
Wakefield	89
Warren	45
Warwick	350
West Greenwich	22
West Kingston	13
West Warwick	104
Westerly	64
Woonsocket	119
Wyoming	3

Municipality	2022 Number of EnerGWise Weatherizations
Albion	2
Ashaway	13
Barrington	137
Bradford	13
Bristol	96
Burrillville	15
Carolina	7
Central Falls	8
Charlestown	50
Chepachet	18
Coventry	147
Cranston	394
Cumberland	155
East Greenwich	122
East Providence	85
Escoheag	1
Esmond	34
Exeter	29
Fiskeville	1
Forestdale	3
Foster	12
Glendale	9
Glocester	17
Greene	5
Greenville	40
Harmony	1
Harrisville	2
Hope	13



Rhode Island Energy Efficiency – Equity Update

Hope Valley	16
Hopkinton	1
Jamestown	37
Johnston	138
Kenyon	2
Kingston	10
L Compton	2
Lincoln	86
Little Compton	17
Manville	8
Mapleville	5
Middletown	76
Misquamicut	4
Narragansett	85
Newport	98
North Kingstown	150
North Providence	154
North Scituate	36
North Smithfield	57
Noth Providence	1
Oakland	4
Pascoag	1
Pawtucket	215
Peace Dale	14
Peacedale	1
Portsmouth	109
Providence	479
Prudence Island	2
Riverside	90
Rumford	65
Saunderstown	27
Scituate	14
Slatersville	9
Slocum	1
Smithfield	25
South Kingston	1
South Kingstown	11
Tiverton	81
Wakefield	127
Warren	53
Warwick	438



Rhode Island Energy Efficiency – Equity Update

West Greenwich	44
West Kingston	19
West Warwick	131
Westerly	99
Wood River Jt	1
Wood River Junction	1
Woonsocket	89
Wyoming	7

Municipality	IES SF Assessments
ASHAWAY	4
BARRINGTON	15
BRADFORD	11
BRISTOL	20
BURRILLVILLE	12
CAROLINA	2
CENTRAL FALLS	6
CHARLESTOWN	15
CHEPACHET	24
COVENTRY	85
CRANSTON	493
CUMBERLAND	7
EAST GREENWICH	12
EAST PROVIDENCE	50
ESMOND	52
EXETER	12
FISKEVILLE	1
FOSTER	6
GLENDALE	1
GLOCESTER	19
GREENE	7
GREENVILLE	28
HARMONY	2
HOPE	11
HOPE VALLEY	10
HOPKINTON	3
JAMESTOWN	8
JOHNSTON	269
KINGSTON	2
L COMPTON	4



Rhode Island Energy Efficiency – Equity Update

LINCOLN	14
MANVILLE	1
MAPLEVILLE	21
MIDDLETOWN	16
NARRAGANSETT	23
NEWPORT	17
NORTH KINGSTOWN	57
NORTH PROVIDENCE	334
NORTH SCITUATE	16
NORTH SMITHFIELD	9
OAKLAND	1
PAWTUCKET	91
PEACE DALE	1
PORTSMOUTH	17
PROVIDENCE	203
RIVERSIDE	39
RUMFORD	19
SAUNDERSTOWN	5
SCITUATE	5
SHANNOCK	3
SMITHFIELD	11
TIVERTON	51
WAKEFIELD	31
WARREN	20
WARWICK	235
WEST GREENWICH	11
WEST KINGSTON	12
WEST WARWICK	57
WESTERLY	70
WOOD RIVER JT	7
WOONSOCKET	5
WYOMING	2

Municipality	IES SF Weatherizations
ASHAWAY	3
BARRINGTON	1
BRADFORD	2
BRISTOL	5
BURRILLVILLE	3
CENTRAL FALLS	15



Rhode Island Energy Efficiency – Equity Update

CHARLESTOWN	4
CHEPACHET	8
COVENTRY	15
CRANSTON	134
CUMBERLAND	20
EAST GREENWICH	1
EAST PROVIDENCE	13
ESMOND	4
EXETER	8
FORESTDALE	2
FOSTER	5
GLOCESTER	2
GREENVILLE	2
HOPE	3
HOPE VALLEY	6
HOPKINTON	3
JAMESTOWN	1
JOHNSTON	36
L COMPTON	1
LINCOLN	16
MAPLEVILLE	6
MIDDLETOWN	5
NARRAGANSETT	6
NEWPORT	2
NORTH KINGSTOWN	18
NORTH PROVIDENCE	36
NORTH SCITUATE	3
NORTH SMITHFIELD	7
PAWTUCKET	91
PORTSMOUTH	7
PROVIDENCE	127
RIVERSIDE	17
ROCKVILLE	1
RUMFORD	8
SHANNOCK	1
SLATERSVILLE	1
SOUTH KINGSTOWN	1
TIVERTON	21

Rhode Island Energy Efficiency – Equity Update

WAKEFIELD	10
WARREN	7
WARWICK	54
WEST GREENWICH	1
WEST KINGSTON	2
WEST WARWICK	25
WESTERLY	15
WOONSOCKET	26
WYOMING	1

9. 4. Whether or not rental unit participation data continues to be gathered and reported quarterly at the "sector level meetings". Reported in Q2 report for EW. Through Q4, 12% of assessments and 11% of weatherization participants are renters/landlords.

For Income Eligible single family, 30% of the assessments are for renters and 15% of weatherization participants are renters/landlords.

10. Track late payments and shut offs.

National Grid currently tracks this information and submits it to the RI PUC. The report can be found at: <http://www.ripuc.ri.gov/eventsactions/docket/4770page.html>, under Other Compliance Reports, National Grid's Low-Income Monthly pursuant to Article II, Section C.22.f. of the Amended Settlement Agreement.

11. Align energy efficiency programs with healthcare and partner to achieve healthcare goals, promote further engagement, and sharing health outcome and impact data.

Partnered with RI Dept of Health to provide training and materials for their staff who provide in home services for clients so they could speak to additional health benefits of weatherizing their homes and refer clients to our home energy assessment vendors (CLEARResult and RISE).

12. Perform a full review of all HR policies and remove outdated policies that restrict hiring such as background checks.

The discussion with the Equity Working Group (EWG) centered around the Company's background check policies for contractors to the energy efficiency programs. Some EWG

Rhode Island Energy Efficiency – Equity Update

members that felt that a background check would be a disincentive for applicants to apply for open opportunities. A particular area of concern centered around the 5 panel drug screening which included marijuana as one of the drugs that was screened.

In review of the background check requirements, the Company felt that a level 2 background check was warranted particularly when contractors could be in a customer's home for several hours during a home energy assessment. After listening to the EWG concerns, in 2022 the background check has moved to a 4 panel drug screen which does not include marijuana.

13. Reduce barriers to professional development, as well as entry into the energy efficiency workforce.

13.1 The RI Workforce Needs Assessment has begun. Our vendor, BW Research, has created 3 surveys (potential workforce survey, current worker survey and employer survey) with input from RIE and OER which are set to go out by the end of this month. Results of the survey expected by March.

13. 2. Continue the lead vendor collaboration with the RI Builders Association, and their affiliate Residential Construction Workforce Partnership, to complete at least two additional Energy Efficiency Program related trainings in 2022. RI Builders Association will report participant demographic information to the Company from the September 2021 training. If necessary, the Company will assist in the targeted recruitment of more diverse trainees for 2022. During 2022, the Company and/or its vendors will also collaborate with the RI Dept of Human Services (DHS) on workforce development efforts from U.S. Department of Energy training funds. RI DHS will also report participant demographic information to the Company, so the Company can assist in the targeted recruitment of more diverse trainees, if necessary.

Completed first cohort. 6 hires EE partners with 2 more hires pending. Second cohort is being trained and EE education is included.

14. Collaborate with local diverse community organizations to train and certify potential workers (Progresso Latino, Hispanic chamber of commerce, Cape Verdean community development).

See recommendation 13. The new workforce development needs assessment, as well as demographic reporting from the new trainings, will help to determine new recruitment and upskilling efforts with a focus on diversity are necessary.