

# MEMO

## CONSULTANT TEAM

**TO:** Energy Efficiency Council  
**FROM:** EEC Consultant Team  
**CC:** Office of Energy Resources  
**DATE:** April 17, 2025  
**RE:** April 17<sup>th</sup> EEC Meeting Briefing Memo



### PURPOSE OF BRIEFING MEMO

The purpose of this briefing memo is to assist members of the Energy Efficiency Council<sup>1</sup> with digesting the many materials and decisions they may need to make at each meeting. It follows a similar format to the official meeting agenda so Councilors can follow along throughout the meeting. For each agenda item, this memo will highlight key considerations for the Council and clearly indicate what actions (if any) the Council needs to take. The Consultant Team (C-Team) has worked with the Office of Energy Resources (OER) to also incorporate the content that Councilors are used to seeing in the “Recommended Vote Language” document. This ensures the Council has a single point of reference during meetings. This memo will also note any supplemental materials that are provided, but not associated with, specific agenda items. The C-Team and OER welcome any feedback on the format and content.

## 6. PROGRAM OVERSIGHT

### 6A. RHODE ISLAND ENERGY PRESENTATION ON EFFICIENCY PROGRAM MARKETING

#### Key Considerations

- The presentation covers marketing campaign consistency and media strategies, including customer testimonials, branding materials, and media calendars
- Budget allocations for residential and commercial programs are provided with breakouts for in-house staff, vendors, paid media, and print/mailing
- Upcoming developments and efforts around addressing equity concerns through marketing efforts will also be discussed

#### Discussion Questions

- How does the Company measure the impact of its marketing efforts? Are there key metrics or performance indicators used to evaluate the success of marketing efforts?
- What are the main challenges that the Company faces in marketing its programs, and what improvements can be made to address those challenges?

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<sup>1</sup> All materials associated with the Energy Efficiency Council are the work of the “Energy Efficiency and Resource Management Council” and any public meetings materials posted on the RI Secretary of State website should be searched using that title.

- Are there any innovative marketing strategies that the Company is considering implementation to improve reach and impact of the programs, especially for customer segments that have been historically underserved?

#### **Council Actions**

Required Vote

Potential Vote

No Vote

### **6B. PRESENTATION OF 2026 ENERGY EFFICIENCY PROGRAM PLAN OUTLINE MEMO**

#### **Key Considerations**

- Rhode Island Energy has developed and shared an Outline Memorandum to provide stakeholders an early insight into changes and topics that will be addressed in the 2026 Plan
- The Plan Outline Memo is not intended to provide a preview of any quantitative elements of the Plan
- The Company will present several topic areas for each sector that are highlighted in the Plan Outline Memo, many of which hit on the themes of the Council's draft priorities.

#### **Discussion Questions**

- Does the memo meet the Council's expectations and provide sufficient understanding and preview of what is to come for the 2026 Plan?
- Does any of the content covered surprise you?
- Are there things that you would have expected to see in the memo but didn't?

#### **Council Actions**

Required Vote

Potential Vote

No Vote

### **6C. DISCUSSION AND POTENTIAL VOTE ON COUNCIL PRIORITIES FOR THE 2026 PROGRAM YEAR**

#### **Key Considerations**

- Over the past few months, the C-Team has worked with the Council to update its priorities for the 2026 EE Plan.
- The C-Team has prepared a memo and accompanying presentation with a third draft of the priorities for the Council to consider. This includes a version of the memo that is in redline compared to the second draft that was presented in March.
- Minor feedback (e.g. changing a word or moving sections around) can be incorporated and voted on at today's meeting, while additional substantive feedback would require updating the document between now and the May Council meeting.

#### **Discussion Questions**

- Do the updates made to the current draft address the Council’s vision for balancing the value and importance of energy efficiency programs with concerns about customer affordability?
- Do the introduction paragraphs for each of the four priorities align with the Council’s motivation for including the priority?
- Does the priority document convey the right level of detail? For example, do the bulleted lists in each priority area adequately convey actions that the Company could take to satisfy the Council’s priority?

#### Council Actions

Required Vote

Potential Vote

No Vote

#### Recommended Vote Language

- **Formal adoption of the Priorities for the 2026 Energy Efficiency Annual Plan:** A motion to adopt the Priorities for the 2026 Energy Efficiency Annual Plan as presented by the Consultant team on April 17<sup>th</sup>, 2025.
- **Adoption of the Priorities for the 2026 Energy Efficiency Annual with amendments:** A motion to adopt the Priorities for the 2026 Energy Efficiency Annual Plan as presented by the Consultant team on April 17<sup>th</sup>, 2025, with the following amendments {state amendments}.

### 6D. PRESENTATION AND DISCUSSION OF 2024 YEAR-END CONNECTED SOLUTIONS RESULTS

#### Key Considerations

- The Company will present on performance of its 2024 ConnectedSolutions Active Demand Response programs.
- Programs were provided to both residential and commercial customers, with multiple pathways for participation.
- Residential thermostat and battery pathways were largely successful, having achieved near or above target enrollments while achieving about 87% of planned demand reduction. The electric vehicle pathway was less successful in meeting enrollment and load shed goals due to program being launched too late in the season.
- Commercial pathways realized about 80% of planned demand reduction, with similar levels of load shed for each of the targeted and daily dispatch pathways.
- The cost-to-achieve a unit of demand reduction was slightly higher than plan for the residential pathways, and slightly lower than plan for the commercial pathways. Overall, the cost-to-achieve was approximately 4% higher than plan.

#### Discussion Questions

- What challenges does the Company face in enrolling new customers and retaining existing ones?

- What were the key drivers of the overspend on residential and the underspend on commercial programs?
- What changes or improvements is the Company considering for the ConnectedSolutions programs to optimize performance and participant engagement in 2025 and beyond?

#### Council Actions

Required Vote

Potential Vote

No Vote

## 7. COUNCIL BUSINESS

### 7A. DISCUSSION OF THE COUNCIL'S 2025 ANNUAL REPORT AND POLICY RECOMMENDATIONS

#### Key Considerations

- The Council has decided to take a new approach this year, streamlining content and using a more consistent Council voice and perspective.
- The C-Team took direction from the March Council meeting to emphasize energy affordability and align Policy Recommendations with Plan Priorities.
- Proposed Policy Recommendations take a more direct approach to informing state-level decision makers of current challenges and opportunities.
- This version is a first draft and will need additional updates, including final 2024 program results and some narrative pieces.

#### Discussion Questions

- What feedback does the Council have on the proposed new section "Energy Efficiency Essentials" (p. 10)?
- Do the Policy Recommendations accurately reflect messages that the Council wants to convey to the legislature, Governor's office, and other state-level decision makers (p. 16)?
- How would the Council like to introduce the 2024 program results section? Are there any key trends or considerations to call out (p. 21)?

#### Council Actions

Required Vote

Potential Vote

No Vote

### 7B. PLANNING DISCUSSION FOR SPRING 2025 LEAD SESSION

#### Key Considerations

- 2025 LEAD Sessions are scheduled for Monday, May 5th and Monday, October 27th at Rhode Island College. All Councilors are expected to participate.
- A list of topics has been proposed based on ongoing Council activities and current developments in Rhode Island's energy landscape.

- LEAD Session meetings are scheduled for three hours and can typically accommodate two or three topics.

#### **Discussion Questions**

- Which potential topics are the highest priority for the spring LEAD Session? Which items would make more sense to cover in the fall?
- Should multiple agenda items be combined where relevant?
- Are there any other topics not on this list that should be considered?

#### **Council Actions**

Required Vote

Potential Vote

No Vote

### **SUPPLEMENTAL MATERIALS**

#### **MONTHLY DATA SNAPSHOT**

The Company's process for transitioning from its legacy data-reporting systems to its new one is continuing to take longer than initially expected. The C-Team will begin distributing Monthly Data Snapshots to the Councilors again as soon as possible once the Company's data reporting system transition is complete.

#### **COUNCIL BUDGET TRACKER**

OER has provided an updated version of the Council's budget trackers for 2024 and 2025.

#### **COUNCIL CALENDAR OF EVENTS**

The Consultant Team has provided a 2025 version of the Council's Calendar of Events which includes meeting dates, topics, and proposed milestones for planning activities related to the 2026 EE Plan.

#### **INITIAL DRAFT OF MAY COUNCIL MEETING AGENDA**

An initial draft of the May Council meeting agenda is included. Councilors are welcome to share any feedback.

#### **COUNCIL NEWSLETTER**

The Consultant Team has provided its next iteration of the Newsletter to the Council. The purpose of the Newsletter is to keep Councilors apprised of activities and developments that are relevant to the Council's interests, but that may not be able to be covered as topics on Council meeting agendas. The Newsletter covers a wide variety of topics such as updates on Equity Working Group and Executive Climate Change Coordinating Council (EC4) meetings, relevant regional energy news, and upcoming energy events.

## **CONSULTANT TEAM QUARTERLY PREVIEW REPORT**

The Consultant Team has provided a brief memo that covers expected deliverables and workstreams for its work during the second quarter.