



# Executive Summary

RI Energy's retrofit program offers financial incentives to encourage large C&I customers to replace existing equipment with energy-efficient equipment. The retrofit program includes three distinct pathways for customers: Prescriptive, Upstream, and Custom. This evaluation study focused solely on the Retrofit Custom Pathway, which was intended to support projects that included energy-efficient upgrades beyond those included in the Prescriptive and Upstream pathways, and that generally required individualized energy savings calculations.

## Why Evaluation?

RI Energy uses evaluation to retrospectively assess the performance of its programs and estimate savings for future program years. As part of its 2024 Annual Plan, RI Energy identified Retrofit Custom Pathway program that would benefit from evaluation support. RI Energy requested that Cadeo conduct a process evaluation to assess program activities and performance and to identify opportunities for program enhancement. Overall, RI Energy's goal was to develop recommendations for custom measure process improvements that could lead to greater participation and energy savings.

## Key Process Findings

As part of the evaluation, Cadeo conducted a comprehensive analysis of program tracking data to summarize program activity, surveyed recent program participants, interviewed program staff and project implementation partners, and reviewed comparable programs in other states.



### Customer Engagement

Participants consistently reported high satisfaction, especially with personal interactions. RI Energy staff played a central role in project initiation and support, with 90% of survey respondents rating their experience at least 4 out of 5. Direct engagement—through inspections, on-site visits, and project coordination—was a key factor in customer satisfaction and program awareness.



### Financial Incentives

The availability and adequacy of financial incentives were pivotal in participants' decisions to pursue energy-efficiency upgrades. While some participants desired more funding, 81% were satisfied with current incentive levels. However, budget constraints remain the primary barrier to deeper or more comprehensive project implementation.



### Scoping Studies

Scoping studies proved highly effective: 75% of participants who received one implemented all recommended measures. Participants also found the application and documentation requirements manageable, with satisfaction ratings above 4.0. These findings highlight the value of structured guidance and streamlined administrative processes in achieving energy savings.

## Conclusions

The evaluation validates RI Energy's Retrofit Custom Pathway program as a well-regarded program that delivers tangible financial and operational benefits to participants. Continued focus on improving program tracking data, streamlining program access, and supporting deeper energy-saving projects could further enhance program performance and customer satisfaction.