

# MEMO

## CONSULTANT TEAM

**TO:** Energy Efficiency Council  
**FROM:** EEC Consultant Team  
**CC:** Office of Energy Resources  
**DATE:** August 21, 2025  
**RE:** August 21<sup>st</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 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. PRESENTATION AND DISCUSSION OF 2025 Q2 PROGRAM RESULTS

#### Key Considerations

- Materials for this agenda item include a presentation from Rhode Island Energy along with its formal Second Quarter report.
- The presentation includes select program highlights, performance updates, and equity metric updates.
- Through mid-year, the electric portfolio has achieved 19% of the lifetime savings goal with 25% of the budget spent while the gas portfolio has achieved 18% of the lifetime savings goal with 30% of the budget spent.

#### Discussion Questions

- Is the Company considering any new or different approaches to attempt to boost participation in the second half of the year, particularly for programs where the Company is currently forecasting significant underspend and/or underachievement?
- The presentation indicates that in the Income Eligible sector, the Company is reallocating some jobs to CAPs that are best equipped to take them on, but the 2<sup>nd</sup> draft of the Plan indicates that

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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.

the workforce at the CAPs is stable and dependable. These two points seem to be in conflict. Can the Company elaborate on the status of the CAP agency workforce capacity?

- What types of projects (building size, equipment type, location) does the Company have in the multifamily pipeline that will result in significant increases in savings between what is reported in the Q2 report and what the Company is projecting for year-end performance?
- Can the Company speak more about the C&I opportunities study referenced in the presentation? What is it, who is conducting it, what is the scope of the study, and when will it be completed?

#### **Council Actions**

Required Vote

Potential Vote

No Vote

### **6B. RHODE ISLAND ENERGY PRESENTATION ON 2026 PLAN SECOND DRAFT**

#### **Key Considerations**

- Materials for this agenda item include a presentation from the Company and 2<sup>nd</sup> draft attachments for the Plan (clean and redline to 1<sup>st</sup> draft).
- The presentation highlights portfolio-level changes in budgets by spending category between the first and second draft of the plan, additional detail on what makes up the Sales, Technical Assistance, and Training (STAT) spending category (largest of the non-incentive spending categories), and select updates on programs.
- The 2<sup>nd</sup> Draft Main Text includes a preamble on the Company's position on key elements of stakeholder feedback from the first draft, including (but not limited to) topics such as budgets, equity, Advanced Meter Functionality, and sector/program comments.

#### **Discussion Questions**

- Can the Company provide any insights as to what key elements of the Plan it is still working on as it works towards the final draft?
- Why did the Company's proposed performance incentive budget increase by over 60% between the first and second drafts when savings only increased by 14% for the electric portfolio and were relatively unchanged for the gas portfolio?
- With respect to the STAT budget detail, how much of the external costs are associated with work that the Company is unable to do internally versus that which it could do internally with the appropriate resources?

#### **Council Actions**

Required Vote

Potential Vote

No Vote

## 6C. PRESENTATION AND FACILITATED DISCUSSION ON THE 2026 PLAN SECOND DRAFT

### Key Considerations

- The C-Team will present on the outcomes of its review of the second draft of the 2026 Plan, including key drivers of change, plan narrative review and assessment of responsiveness to comments provided on the first draft, and key improvements and areas for improvement.
- C-Team finds that while there are some improvements in the 2<sup>nd</sup> draft of the Plan, there still exists significant room for improvement.
- Majority of C-Team recommendations on first draft either not responded to or responded to with an indication that no changes are expected.

### Discussion Questions

- Are there elements (micro or macro) of the Plan that the Council would like the Company to focus on in finalizing the Plan?
- Do Councilors feel like the Plan makes a good faith effort to address its priorities?
- What information does the Council feel like it still needs to better understand before considering its vote?

### Council Actions

Required Vote

Potential Vote

No Vote

## 6D. PRESENTATION AND DISCUSSION ON DOCKET 25-28-EL ON OPTIONS FOR MITIGATING WINTER PRICE VOLATILITY

### Key Considerations

- The PUC is exploring rate mitigation options to address recurring issues of higher electricity costs during winter months.
- Mitigation options being considered include deferring cost recovery for certain items (including the energy efficiency charge) during winter months to other months not impacted by winter peak period as well as alternative rate recovery periods.
- Notice for input was issued after the July Council meeting with comments due before the August Council meeting so the Council's legal representative requested and approved an extension to August 25<sup>th</sup>.
- If there is a hearing on this Docket, it would likely occur in mid-September
- Several stakeholders have already submitted comments, which will be described in the C-Team's presentation.

### Discussion Questions

- Does the Council wish to formally submit comments on the mitigation strategies considered?

- Are there elements of comments that other Stakeholders have already provided that the Council would like to support and/or oppose?
- Are there comments Councilors would like to share that have not been raised by other Stakeholders on this matter?

#### Council Actions

Required Vote

Potential Vote

No Vote

#### Recommended Vote Language

- **Formal submission of comments to the PUC:** A motion to direct the Council's Consultant Team to draft formal comments that reflect the nature of the conversation at today's meeting and to work with the Council's legal representatives to file said comments with the PUC by August 25<sup>th</sup>.

## 7. COUNCIL BUSINESS

### 7A. PRESENTATION AND DISCUSSION ON SETTING 2027-2029 ENERGY EFFICIENCY TARGETS

#### Key Considerations

- The Council is required to develop and submit to the PUC energy efficiency program targets for the period of 2027-2029
- The purpose of the targets is to help establish what is potentially available cost-effective efficiency and to guide establishment of savings goals
- Targets historically have utilized potential study results for the corresponding years. Since the most recent study only goes through 2026, the Council will need to identify resources and a potential approach for ensuring it is able to develop its proposed targets for 2027-2029.

#### Discussion Questions

- Of the report components that are optional, are there any that the Council would like to include as part of this work?
- How should the Council balance benefits of setting aggressive targets with risks of overestimating market readiness or budget capacity?
- How should other policy/priorities be considered (e.g., equity and access, integration with Act on Climate, etc.)?

#### Council Actions

Required Vote

Potential Vote

No Vote

## **SUPPLEMENTAL MATERIALS**

### **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.

### **COUNCIL BUDGET TRACKER**

OER has provided an updated version of the Council's budget tracker for 2025.

### **INITIAL DRAFT OF SEPTEMBER 11 COUNCIL MEETING AGENDA**

An initial draft of the September 11<sup>th</sup> 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.

### **MONTHLY DATA SNAPSHOT**

The Consultant Team has provided a monthly data snapshot which includes several visuals to display lifetime savings and spending achieved through the month of July, relative to plan goals.

### **CONSULTANT TEAM QUARTERLY BUDGET UPDATE**

This memo provides the Council with an update on the Consultant Team's budget after the close of the second quarter. The update provides a summary of year-to-date spending and hours compared to planned budgets and hours.

### **STAKEHOLDER COMMENTS ON THE SECOND DRAFT OF THE 2026 ANNUAL ENERGY EFFICIENCY PLAN**

Stakeholder comments received on the second draft of the 2026 Annual Energy Efficiency Plan are included as supplemental materials. These comments, as well as comments received on the first draft of the Plan, are also available for review on the [Data and Publications page](#) on the Council's website.

### **SECOND DRAFT OF THE 2026 ANNUAL ENERGY EFFICIENCY PLAN**

Copies of the main text and attachments of the plan have been provided. Redline copies are also provided. Attachments include:

- Attachment 1 – Residential and Income Eligible Programs

- Attachment 2 – Commercial & Industrial Programs
- Attachment 3 – Evaluation, Measurement, and Verification Plan
- Attachment 4 – Rhode Island Test Description
- Attachment 5 – Electric Budget and Savings Tables
- Attachment 6 – Gas Budget and Savings Tables
- Attachment 7 – Demonstrations, Pilots, and Assessments
- Attachment 8 – Definitions
- Attachment 9 – Equity Working Group Report