

MEMO

CONSULTANT TEAM

TO: Energy Efficiency Council
FROM: EEC Consultant Team
DATE: January 15, 2026
RE: Proposed 2026 Scope of Work and Budget



I. INTRODUCTION

Optimal Energy, LLC. and its partners (collectively the Consultant Team or C-Team) appreciate the opportunity to continue serving Rhode Island’s Energy Efficiency Council¹ (the Council) with high quality policy and program consultant services. The Consultant Team provides the following proposed Scope of Work (SOW) for its services to the Council in ~~2026~~2025. The proposed SOW retains a clear focus on the key activities delivered in ~~2025~~2024 in service of the Council’s statutory obligations, including program implementation oversight and program planning activities. We have developed this SOW with an emphasis on delivering the key activities at the budget level the Council initially approved for Consultant services in 2026~~a similar budget to what was utilized in 2024.~~² During implementation of our work plan, coordination with other stakeholders, including Rhode Island Energy (the Company), OER, the Division of Public Utilities and Carriers (DPUC), the Public Utilities Commission (PUC), among others, will be critical to continue to align efforts; build consistent approaches to planning; streamline delivery; and foster effective collaboration and partnership to drive progress toward greater equity in program design, implementation, workforce, and outcomes, as the clean energy industry rapidly evolves. The C-Team also recognizes the need to be efficient with how it represents the Council in all meetings and events covered in this SOW and committed to an approach that aligns staffing levels with need.

In 2022, the C-Team revised our organizational schema to align our work plan with the organization of our invoices. The C-Team proposes to continue with the outcome of that process in our ~~2026~~2025 SOW, which is detailed in Section II of this document.

The primary changes reflected in our proposed ~~2026~~2025 SOW compared to the approved ~~2025~~2024 SOW are as follows:

- Section II

¹ All materials associated with the Energy Efficiency Council are the work of the “Energy Efficiency and Resource Management Council” and any public meeting materials posted on the Rhode Island Secretary of State website should be searched using that title.

² The \$700,000 amount allocated to consultant services is approximately 5% lower than what the consultant services required for delivering its 2025 work. The Consultant Team as it always has will strive to deliver its services as cost-effectively as possible and within the Council approved budget. Throughout the year, the Consultant Team will keep the Council apprised of its spending and work to flag any budget concerns it may have as early in the year as possible.

- Updated content throughout to include references to work streams that are specific to this calendar year, including those related to the development of the Council’s proposed 2027-2029 Energy Efficiency Targets, updates to the Least Cost Procurement Standards, and 2027-2029 Three-Year EE and SRP plans.
- Reflected potential for transition from binding annual to binding three-year energy efficiency plans
- Updated education initiative support to reflect expected workstreams in 2026
- Expected increase in SRP support given that 2026 is a planning year
- Enhanced support for regulatory matters, in particular those tied to supporting direct Councilor involvement
- Updated description related to Council support on OER’s RFP for the administration of ratepayer funded energy efficiency programs
- ~~○ Added references to workstreams related to Council’s work on Act on Climate initiatives~~
- ~~○ Updated list of potential technical session topics to support based on outcomes of 2025 Plan Docket~~
- ~~○ Removed work to support Energy Training for K-12 Educators as the Council does not have a dedicated budget item for this work stream~~
- ~~○ Removed work to support the Council’s Branding and Communications, as this work was completed in 2024~~
- ~~○ Updated planned support for the Council’s Public Education Event Planning and Outreach to align with the updated work proposal from the University of Rhode Island~~
- ~~○ Updated work streams supporting the Council’s Energy Efficiency and Climate Awareness Campaign~~
- ~~○ Added a workstream as part of the Councilor Handbook updates to document the history of the Council and its key decisions~~
- ~~○ Updated Task 2 to reflect Demand Side Management (DSM) support in addition to System Reliability Procurement (SRP)~~
- ~~○ Updated SRP and DSM implementation and oversight activities to reflect nature of expected work in 2025, including for the Company’s targeted demand response, energy efficiency, and electric heating conversion program (“Old Mill Lane Plan”)~~
- ~~○ Added workstreams for supporting participation of individual Councilor(s) in the 2026 Plan Docket, including testimony development, data request responses, and hearing preparation~~
- ~~○ Updated support for the Council’s Annual Report development, including for developing, printing, and distribution of easily digestible pamphlets~~
- ~~○ Added workstream for supporting the Council’s engagement and interests in the Executive Climate Change Coordinating Council’s (EC4) meetings and its development of the 2025 Climate Action Strategy~~
- Added commitment to make a concerted effort to monitor agendas for the Energy Efficiency and SRP TWG and Equity Working Group (EWG) meetings and inform Councilors when their attendance might be beneficial

- Section III
 - Updated organizational chart
 - Updated ~~rates and~~ staffing tables
 - Updated planned hours and budget table

Section II of this memo, ~~2026~~2025 Work Plan, summarizes the Consultant Team’s work plan organized by task and subtask. Section III, Staffing and Budget, provides information on the Consultant Team’s staffing and includes an estimate of the budget that would be necessary to support our proposed ~~2026~~2025 SOW.

II. ~~2026~~2025 WORK PLAN

As noted above, this section of our SOW showcases the improved organizational schema we developed in 2022. The list of Tasks below reflects the Council’s legislated responsibilities and obligations and is the same set of Tasks that was approved in our ~~2025~~2024 SOW.

- Task 1 – Energy Efficiency Program Planning and Implementation Oversight
- Task 2 – System Reliability Procurement and Demand Side Management
- Task 3 – Regulatory Proceedings
- Task 4 – Council Sponsored Meetings and Materials
- Task 5 – Research, Analysis, and Other Council Support
- Task 6 – Administrative
- Task 7 – Council Intern

To ensure clarity and transparency, we have organized our work plan with sub-tasks under several of the Tasks, which break out work streams that are relatively discrete within the overall Task. In the remainder of this section, we present the tasks and sub-tasks and describe associated responsibilities and deliverables.

TASK 1 – ENERGY EFFICIENCY PROGRAM PLANNING AND IMPLEMENTATION OVERSIGHT

Task 1 includes activities necessary to meet the Council’s fundamental objectives, which are to oversee the design and successful delivery of energy efficiency programs and services that maximize the resulting benefits for all Rhode Islanders. Our approach will ensure that the Council continues to achieve the clearly documented objectives for energy efficiency plan development and delivery codified by the PUC in the Least Cost Procurement (LCP) Standards, including detailed review of energy efficiency plans to ensure that proposed costs are reasonable and justified to assure cost-efficiency as well as cost-effectiveness. We will also continue to keep climate change at the forefront of our work to ensure that the Council is also meeting its responsibilities under Rhode Island’s Act on Climate. Our proposed work under Task 1, which is described in further detail below, is comprised of Council representation, implementation oversight and plan development, and education initiatives.

Task 1.1 – Council Representation

Under Task 1, the C-Team will represent the Council at a variety of meetings related to program planning and oversight. First, the C-Team will represent the Council and participate along with other stakeholders at all Energy Efficiency Technical Working Group (EE TWG) meetings. Second, we propose to staff C-Team members as active participants in all Equity Working Group (EWG) proceedings in ~~2026~~~~2025~~ so that we may convey Council input to the EWG, report back to the Council regarding commitments made in the ~~2026~~~~2025~~ Annual Energy Efficiency Plan (~~2025~~~~2026~~ EE Plan), as well as proposed commitments for the 2027-2029 Three Year ~~2026 Annual~~ Energy Efficiency Plan, inclusive of the 2027 Annual Energy Efficiency Plan (the 2027 Plan) should it continue to be delivered separately and alongside the Three-Year Plan ~~(the 2026 Plan)~~. The C-Team is proposing to continue leveraging its experience from similar equity working group activities in other jurisdictions and to continue to play an active role in partnering with OER and the Company to guide the EWG. The C-Team is also proposing to continue representing the Council on the EWG and partner with OER and RIE to ensure EWG activities appropriately complement the Council's oversight of energy efficiency program planning and implementation. Finally the C-Team will represent the Council in all necessary meetings with OER and the Company to fully support Council-related activities and responsibilities, ensure all deliverables meet deadlines that allow for adequate Council review and feedback, and to prepare for upcoming Council meetings.

Task 1.2 – Implementation Oversight and Plan Development

Under this subtask, the C-Team will engage in a variety of activities that are at the core of ensuring energy efficiency programs are developed and implemented in a manner consistent with LCP and with the Council's and stakeholders' interests in mind. The activities include sector strategy and program oversight, evaluation, measurement and verification (EM&V), annual plan development, and stakeholder engagement.

With respect to the first activity noted above, the sector strategy and program oversight team is primarily responsible for ensuring that the ~~2026~~~~2025~~ programs are delivered according to the PUC approved ~~2026~~~~2025~~ EE Plan. The C-Team uses a two-pronged approach which includes ongoing monthly data review and monthly strategy calls with the Company, OER, and the DPUC at their discretion. On a monthly basis, the C-Team reviews raw program data received from the Company and incorporates it into a monthly data report which it reviews and shares with the Company, OER, and DPUC. In its review, the C-Team will flag areas of concern and needed improvement, and where appropriate make recommendations for optimizing and improving program performance. In addition to the more technical data report described above, the C-Team will continue plans to develop and distribute monthly data snapshots intended to give Councilors, interested stakeholders, and members of the general public a quick and easy way to understand the year-to-date progress of the ~~2026~~~~2025~~ EE Plan.³ The C-Team also

³~~The C-Team developed and initially began distributing these early in 2024, however, work on these was paused during the Company's transition of data systems. We anticipate that the issues that arose with the transition will be resolved and that the snapshot will be provided regularly in 2025.~~

coordinates monthly sector strategy meetings for each of the Residential and Income Eligible and Commercial and Industrial sectors, for a total of twenty-four regularly scheduled meetings. Monthly meeting topics generally include, but are not limited to, review of ~~2026~~2025 EE Plan commitments, program performance data review, and special topics on an as-needed basis.

The second activity, EM&V, includes reviewing and providing technical feedback on in-progress studies as well as the scopes of work for upcoming studies. The C-Team meets with the Company, OER, and DPUC at their discretion, twice per month to check-in on these items, once each for studies addressing the Residential and Income Eligible and Commercial and Industrial sectors. On an as-needed basis, the C-Team will also hold or participate in meetings with study vendors to address any concerns identified in the review of study design and results materials. One of the key goals of the EM&V work stream is to ensure consistency of study development, review, and approval so that results of each study can be actionable to help in guiding ~~future~~annual plan development and implementation. To support this goal, the C-Team and the Company developed EM&V study trackers to ensure full transparency around the sharing of deliverables and expected timelines for stakeholder review of study materials. Another key goal of the C-Team's EM&V efforts is to leverage studies from other jurisdictions that can be applied to Rhode Island in order to benefit from evaluation study results without incurring additional costs to ratepayers.

Third, the C-Team will support the Council in its development of proposed targets and priorities for the 2027-2029 period~~2026 Plan~~. For the 2027-2029 Targets ("the Targets"), the C-Team will develop proposed targets for energy efficiency and active demand response and will assist in developing all aspects of the Targets report to be filed with the PUC as required by the LCP Standards. For the Council's ~~2027-2029~~2026 Plan priorities, the C-Team will work~~anticipates a process~~ to ensure that Council priorities identified early in 2026 are ~~around equity, workforce development, carbon pricing, savings goals, and any other items the Council identifies are fully~~adequately addressed in the energy efficiency plan(s)~~Plan~~. As a reminder, there have been recent discussions amongst parties about the potential to shift from developing non-binding three-year plans with binding individual annual plans to just developing binding three-year plans. If that were to happen, it would likely result in a binding 2027-2029 plan that would not include a separate 2027 annual plan. Regardless of whether or not that happens, the C-Team will work to ensure the Council's priorities are conveyed and captured at the appropriate level within any and all versions of energy efficiency plans to be developed and filed with the PUC.

Fourth, to ensure the 2027-2029 Three-Year Plan (and 2027 Annual Plan if necessary)~~2026 Plan~~ is developed in a manner consistent with LCP and reflects the Council's and other stakeholders' priorities, the C-Team will review and provide feedback on all plan materials, including the main text and all attachments of the plan(s)~~2026 Plan~~ narrative, benefit cost models, the Technical Reference Manual (TRM), as well as all relevant updates. During the development of the plan(s)~~2026 Plan~~, the C-Team will meet regularly with members of the Company either through the sector strategy teams or through dedicate deep dive meetings on a variety of key topics crucial to the advancement of energy efficiency. The C-Team will also engage with the Company, OER, and DPUC on other planning topics on an as-needed basis. Finally, the C-Team will ensure that relevant outcomes and rulings by the PUC in the ~~2026~~2025 Plan Docket are considered in program design for the future plan(s) to be developed in the

2026 Plan. These may include topics such as carbon accounting methodology, coordination between the Company and the State's program offerings, and considerations for transitioning from annual to three-year energy efficiency plans.

Task 1.3 – Education Initiatives

To fulfill the Council's legislated public education objectives, the C-Team proposes to support an array of Council education activities in 2025 by continuing its coordination and facilitation of the Education Committee meetings and activities. The C-Team will continue to oversee, manage, and assist OER and/or the Company in organizing and promoting the following efforts:

- **URI Cooperative Extension Education Initiatives**~~Public Education Event Planning and Outreach:~~ This includes supporting events such as the Efficient Housing for All Community of Practice and the Plugged into Energy Research Lecture Series, that are scheduled to be delivered by the University of Rhode Island. These events are designed to promote public understanding and stakeholder dialog around key energy efficiency and related issues that impact Rhode Islanders today. The C-Team will oversee, guide, and support implementation of URI Cooperative Extension's education-focused scope of work as funded by the Council. The 2026 scope is expected to center around the design and delivery of a bilingual Home Energy Navigator training pilot for a selected community, aimed at equipping trusted community health workers with foundational energy efficiency and weatherization knowledge. A key component of this work will include development of a digital Rhode Island Home Weatherization Roadmap, a user-friendly decision tree tool that can be used as a step-by-step guide by Energy Navigators and ratepayers. The C-Team would also coordinate a multi-organizational partnership supported by ACEEE's Energy Equity for Renters program. If awarded, this would offer no-cost technical assistance to strengthen the Energy Navigator program design, including curriculum and tools as well as metrics, evaluation, and replicability.
- **Energy Expo at the Rhode Island Home Show:** The C-Team will participate as needed in planning and coordination meetings, provide oversight and logistics, and ensure Council priorities and input are reflected, maintaining energy as a focal point of this major public-facing event. This effort ensures that energy is a focal point of this major show, allowing Rhode Islanders to connect face-to-face with local energy vendors who can help them learn about and implement clean energy measures in their homes.
- ~~**Energy Efficiency and Climate Awareness Campaign:**~~ As the least cost clean energy resource, energy efficiency plays a foundational role in addressing climate change and achieving Rhode Island's Act on Climate mandates. It is, therefore, crucial that the public continue to see investments in energy efficiency as a necessity for combating climate change. In its 2025 budget proposal, the Council allocated funds that may be utilized to build on the work that it started in 2024 to develop and deliver a public awareness campaign that promotes the benefits of energy efficiency in the context of mitigating the impacts of climate change. This may include activities such as: 1) evaluating key performance indicators, assess tactics to date, and adapt strategy as needed, 2) continue implementation of comprehensive marketing campaign, potentially

~~expanding into additional media platforms, and 3) integrating campaign with other relevant Council sponsored events.~~

- ~~**Council Member Handbook:** The Council member handbook serves as a reference guide to Councilors and is intended to provide helpful background information on topics such as energy, energy efficiency, the Council’s history and makeup, and the evaluation of programs. The C-Team typically reviews the Handbook every couple of years to ensure that existing content is still relevant, and that new content can be added to keep the Handbook up-to-date. The last formal update to the Handbook was in 2022 and there have been many notable updates in the energy landscape in the time since. Given the likelihood of new Councilors joining this year, the C-Team believes 2026 is the right time to formally update this document so that new Councilors have an up-to-date resource. ,and the C-Team began work in 2024 to review and update it gain. In 2025, the C-Team will continue this work with the goal of publishing an updated version in the calendar year. Some areas that we intend to update include:~~
- ~~Council Member Responsibilities section to reflect feedback received at the Council’s 2023 Fall Learning, Education, and Advancement Discussion (LEAD) meeting related to job descriptions and estimated time commitments~~
- ~~Content related to energy efficiency’s role in meeting the Act on Climate mandates~~
- ~~Information on outcomes from the Future of Gas Docket~~
- ~~Background on various sources of recently established federal funding that may support energy efficiency and the Council’s objectives~~
- ~~The State of Rhode Island’s CleanHeatRI program~~
- ~~History of Council and Key Decisions~~
- **EERMC Newsletter:** In 2023, with support from the inaugural Mike Guerard Energy Fellow, the C-Team began delivering a Newsletter to Councilors that covers a wide variety of topics such as updates on Future of Gas Docket proceedings, Equity Working Group and Executive Climate Change Coordinating Council (EC4) meetings, relevant regional energy news, and upcoming energy events. The purpose of these Newsletters is to keep Councilors apprised of activities and developments that are relevant to the Council’s interest and obligations, but that may not be able to be covered as topics on Council meeting agendas. The C-Team continued this work by developing and distributing these Newsletters in ~~2024~~20224 on a bi-monthly cadence. In 2025, the C-Team proposes to continue with this cadence, with the Councilors servingservice as the primary target audience. The C-Team is always open to discussing feedback on these Newsletters, including shifting to, or supplementing with, a public-facing resource.

TASK 2 – SYSTEM RELIABILITY PROCUREMENT AND DEMAND SIDE MANAGEMENT

Task 2 is focused on the Council’s responsibilities related to System Reliability Procurement (SRP) and Demand Side Management (DSM). This work is related to, but separate from, the Council’s core work around energy efficiency program planning and implementation oversight (See Task 1). This includes representing the Council at up to twelve SRP Technical Working Group (SRP TWG) meetings as well as providing technical support in the development and oversight of SRP Plans and related investment proposals.

Task 2.1 – Council Representation

The C-Team will represent the Council and participate along with a number of core stakeholders at monthly SRP TWG meetings and other meetings as may be scheduled from time to time regarding SRP Plans and SRP and DSM investment proposals.

Task 2.2 – Implementation Oversight and Plan Development

The C-Team will continue its work to support and oversee the implementation of the 2024-2026 SRP Plan. The C-Team anticipates continued efforts around initiatives for a variety of Company projects related to Non-Wires Alternatives (NWA), Non-Pipes Alternatives (NPA), and demand response (DR) investment proposals. This will include supporting review of plan designs and benefit cost analyses (BCA) for any SRP and DSM investment proposal that the Company seeks to explore in 2026~~2025~~. One notable item that the C-Team anticipates providing support for is review and input on the development and filing of the Company's 2027-2029 SRP plan which is expected to merit significant attention throughout 2026. This will come in the form of reviewing draft plans, providing input through the SRP TWG, and any other ad hoc deep dive meetings on various plan elements throughout the year.~~targeted demand response, energy efficiency, and electric heating conversion program ("Old Mill Lane Plan") that the Company is required to file with the PUC by June 1, 2025.~~

TASK 3 – REGULATORY PROCEEDINGS

Task 3 represents the C-Team's focus on ensuring that the Council meets its statutory obligations with respect to the 2027-2029 EE Targets, updates to the LCP Standards, the 2027-2029~~2026~~ EE and SRP Plan filings, SRP and DSM investment proposals, The C-Team will also monitor and engage in as needed and any other dockets that may take place in 2025~~2026~~ that are relevant to the Council's work. Examples include,~~such as~~ continued work on the Future of Gas Docket and Rhode Island Energy's rate case~~representing the Council in a docket related to the RFP for EE Implementation Services recently released by the Office of Energy Resources~~. The C-Team will continue to make sure that the Council's views are represented in all relevant regulatory proceedings. To achieve this, the C-Team will represent the Council at a variety of regulatory proceedings and develop and review relevant technical material, each of which is described in more detail below.

Task 3.1 – Council Representation

The C-Team will represent the Council at all relevant PUC technical sessions, hearings, and open meetings. For PUC technical sessions, the C-Team anticipates representing the Council in at least four meetings on an as needed basis, which.~~Such meetings~~ are typically geared toward clarifying questions and discussions related to the intent and processes that result in filed materials (for pre-filing meetings) and review of said filed materials (for post-filing meetings) in EE, SRP, and DSM Plan and Investment Proposal Dockets. In addition, there have at times been technical sessions to engage in more detail with questions that arise during hearings. Once a plan or investment proposal~~n-EE Plan~~ has been filed with the PUC, the PUC will conduct a series of hearings in which intervening parties may be cross-examined. As it has in years past, the C-Team plans to represent the Council during ~~EE Plan~~ hearings, up to and

including providing direct testimony in front of the PUC. When not providing direct testimony, the C-Team will monitor the hearings and report back relevant information to the Council. Between and/or at the conclusion of ~~plan~~ hearings, the PUC regularly holds open meetings where the Commissioners will discuss and potentially rule on certain aspects of the docket. The C-Team will monitor these meetings and will report back any relevant conclusions to the Council.

In addition to representing the Council at PUC proceedings related to the EE, SRP, and DSM Plans, the C-Team proposes to represent the Council where necessary in the Future of Gas Docket. This would include any support needed in directly representing Councilors who are on the Stakeholder Committee in that Docket, as well as continued support in any meetings that may be scheduled once the final report is filed in this Docket. ~~Finally, the C-Team would also support the Council in any Docket that may be opened related to OER's RFP for EE Implementation Services.~~

Task 3.2 – Develop and Review Technical Materials

To support the Council in development and review of technical materials related to the ~~2026 Plan~~2027-2029 EE Targets, updates to the LCP Standards, the 2027-2029 EE and SRP Plans, and any associated SRP and/or DSM investment proposals, the C-Team proposes ~~seven~~five key work streams. First, ~~in accordance with LCP Standards,~~ the C-Team will assist the Council in the development and submission of a report that makes recommendations for the 2027-2029 Targets to the PUC. Second, we plan to prepare materials and/or participate in meetings with stakeholders related to updates to the LCP Standards, including but not limited to those that might inform a shift from binding annual plans to binding three-year plans. Third, we will conduct a detailed analysis on the proposed 2027-2029 EE and SRP~~2026 Plan(s)~~ to determine cost-effectiveness and will work with ~~OER and~~ the Council's Attorney to submit a report on its findings to the PUC on behalf of the Council. ~~Fourth~~Second, the C-Team will ~~support~~prepare a report that documentation of documents the Council's reasons for not endorsing the ~~plan(s)~~2026 EE Plan (if necessary), and will submit comments on behalf of the Council in the form of pre-filed testimony to the PUC for its consideration during plan proceedings. ~~Over the past two years,~~in 2024, the C-Team also assisted in the development of pre-filed testimony of an individual Councilor as part of the energy efficiency plan Docket proceedings, and we would continue to do so in ~~2026~~2025 should one or more individual Councilors wish to submit testimony. ~~Fifth~~Third, the C-Team will assist the Council in preparing, submitting, and updating as necessary, its budget proposal for ~~2027~~2026 to the Company for inclusion in its ~~2026 Plan~~plan filing(s). The C-Team will also assist in developing~~provide~~ testimony to the PUC ~~on behalf of the Council~~ which documents and justifies its budget proposal. ~~Sixth~~Fourth, the C-Team will coordinate with ~~OER and~~ the Council's Attorney to review and respond to any information or data requests directed to the Council as part of ~~the~~ plan proceedings. Finally, the C-Team will track and review responses to information requests of other intervening parties where appropriate as it relates to Council interests.

The C-Team will also prepare and/or review technical materials on the Council's behalf related to the other dockets anticipated to occur in ~~2026~~2025, including Future of Gas, Energy Efficiency Implementation, and the Company's targeted demand response, energy efficiency, and electric heating conversion program ("Old Mill Lane Filing"). ~~The C-Team will also be prepared to prepare materials~~

~~and/or participate in meetings with stakeholders related to potential future updates to the LCP Standards, such as work that might inform shifting from binding annual plans to binding three-year plans.~~

TASK 4 – COUNCIL SPONSORED MEETINGS AND MATERIALS

Task 4 is centered around providing technical support for Council sponsored meetings. This includes appropriately staffing Council sponsored meetings, developing materials, and supporting other Council responsibilities.

Task 4.1 – Meeting Attendance

The C-Team will appropriately staff all Council sponsored meetings, including up to thirteen scheduled Council meetings, four scheduled meetings of the Executive Committee, up to twelve meetings of the Council’s Education Committee, and up to two additional meetings to support Councilor Learning, Education and Advancement (LEAD) as they perform their assigned roles and responsibilities. In addition to staffing meetings, the C-Team will be prepared to present and provide input on critical topics and key points for Council deliberation.

Task 4.2 – Develop Materials

In advance of all Council sponsored meetings, the C-Team will work with the Council and OER on developing the agenda to identify what materials may be needed to support Councilors’ engagement with and understanding of meeting content, or to ensure the Council’s legislated objectives are met. The C-Team will also support OER in the development of a “month-ahead” draft agenda for the following month’s Council meeting as well as an annual calendar that highlights all upcoming meetings and potential meeting topics. This will help ensure Councilors and Stakeholders alike have a clearer picture of what to expect beyond just the upcoming meeting. The C-Team will then develop all required meeting materials and work with OER to ensure that materials are distributed to the Council and other meeting attendees in a timely manner in advance of each meeting. In order to assist the Council’s ability to digest the many materials and decisions it may need to make on a month-to-month basis, the C-Team will continue providing a short briefing material that will follow a similar format to the meeting agenda and will highlight key considerations for each item for the Council in 2026~~2025~~.

Task 4.3 – Other Council Responsibilities

Beyond the items described in Tasks 4.1 and 4.2, the Council has some responsibilities that fall outside of the other Task areas described in more detail throughout this work plan. One of these responsibilities is the development of the statutorily required Annual Report to the General Assembly. The C-Team will continue to take the lead on coordinating and assembling content of the Annual Report and will work with OER and the Council to ensure that the Annual Report is submitted in accordance with legislation. In 2024, the Council elected to not print full copies of the Annual Report, instead opting for a smaller pamphlet summary. In 2026~~2025~~, the C-Team will work with the Council to develop, print, and distribute the accompanying pamphlets.

This subtask also includes the C-Team’s support for the Combined Heat and Power (CHP) Annual Public Meeting. As required by legislation⁴, the Council is to gather stakeholders to discuss opportunities and strategies around CHP in Rhode Island. As it has done in years past, the C-Team will coordinate with OER and the Company in scheduling and hosting the meeting on behalf of the Council.

TASK 5 – RESEARCH, ANALYSIS, AND OTHER COUNCIL SUPPORT

The C-Team has been an early voice in many jurisdictions highlighting the imperative to work across areas of energy policy and programs that have historically existed in silos. The process of developing and managing plans that address the integration of cross-cutting solutions and approaches requires a team able to draw on experts across the spectrum of clean energy resources and policies. We will support Rhode Island’s continuing leadership in the evolving energy landscape by applying our engagement in a range of jurisdictions on issues including workforce development, heating decarbonization, equity in efficiency programs, Non-Wires and Non-Pipes Alternatives, and distributed energy resources. Our proposed approach to this includes representing the Council in meetings with the General Assembly, Executive branch agencies, ISO-NE, the Avoided Energy Supply Cost Group, as well as regional initiatives coordinated by groups such as NEEP. The C-Team will pair this representation with subject matter research on an as needed basis as requested by the Council.

Over the past couple years, the~~The C-Team has also proposes to supported~~ the Council in all matters related to OER’s ~~ongoing work issuing an RFP for, and potentially selecting a vendor for~~ the administration of ratepayer funded energy efficiency programs in Rhode Island. Towards the end of 2025, it was announced that the procurement had been cancelled. The C-Team, along with two members of the Council, have played an important advisory role during this process and plan to share its perspectives on the outcomes of the procurement in 2026. The C-Team plans to support any processes necessary for closing the loop on this process in 2026.~~More specifically, the C-Team proposes to continue coordination with OER regarding evaluation of proposals received, representing the Council at any relevant PUC proceedings, and onboarding (as needed) a potentially new program administrator. The C-Team proposes to work with OER on behalf of and with Council input given the Council’s legislative requirement to coordinate with OER on this matter.~~

Over the ~~past coming~~ year, the EC4 ~~will be engaged~~ing in a process to develop the State’s 2025 Climate Action Strategy as a key ~~element of next step in~~ implementing the Act on Climate. Given that energy efficiency is a key element of Rhode Island’s Climate Action Strategy, the C-Team will work to review and understand how energy efficiency is considered and how it should apply to the work of the Council~~it will be important that the Council support the development of the Climate Action Strategy.~~ The C-Team will continue to monitor the EC4’s activities and will provide input on behalf of the Council during the development of any future outcomes from the Climate Action Strategy, especially those related to energy efficiency in 2026.

⁴ See Section d.6.iv in R.I. General Laws § 39-1-27.7, available online at: webserver.rilegislature.gov/Statutes/TITLE39/39-1/39-1-27.7.HTM

Council leadership believes that well-informed and educated Councilors are an integral component of the Council delivering on its stated mandates. To ensure this, the C-Team is available to brief each voting Councilor and the non-voting representative for delivered fuels individually or in small groups⁵, as directed. When requested or necessary, the C-Team will work to ensure that briefings are conducted as efficiently as possible and are focused on the Council’s core deliverables. Additionally, the C-Team acknowledges the Council’s potential interest in a set of standardized “office hours” for pre-Council meeting briefings that was communicated at its 2023 Fall LEAD Session. In 2024, the C-Team established recurring meeting series with several Councilors and proposes to continue doing so in 2026~~work with any other individual Councilors, or the Council as a whole, in the first quarter of 2025 to better understand how we might support a more open “office hours” approach if there remains interest~~. The C-Team will also monitor agendas for meetings such as the EE and SRP TWG and EWG and advise Councilors when relevant and important topics are to be discussed.

Given that there is the potential for vacant seats on the Council to be filled in 2026~~2025~~, the C-Team also proposes to meet with, educate, and orient new Councilor(s) to cover roles, responsibilities, and evolving efficiency issues.

Finally, the C-Team will meet individually with active energy efficiency stakeholders on behalf of the Council on a regular or as-needed basis throughout the year to ensure their priorities and thoughts on program design and strategies are given due consideration in the development and implementation of annual energy efficiency plans.

TASK 6 – ADMINISTRATIVE

The C-Team proposes to continue utilizing a reduced billing rate to cover a variety of administrative work streams. The C-Team expects that these hours will be fairly minimal as they will be used only in instances where staff are needed in a non-technical capacity. The following work streams will be billed under the administrative rate:

- **Meeting coordination and logistics:** Event planning work such as venue research and booking, food and drink planning, and venue setup.
- **Council website:** C-Team assistance to OER in maintaining the Council’s website on an as-needed basis.
- **Quarterly Preview Reports:** Develop and provide the Council with quarterly written reports covering deliverables, activities, and events expected in the upcoming quarter.

TASK 7 – COUNCIL INTERN

The C-Team proposes to engage an intern for the calendar year 2026~~2025~~ to fill the Mike Guerard Energy Fellow Internship. The internship provides workforce development opportunities for Rhode Island based college students. The intern will assist the Council and its C-Team in support of the

⁵ The C-Team will ensure that a quorum is not met when meeting with small groups of Councilors.

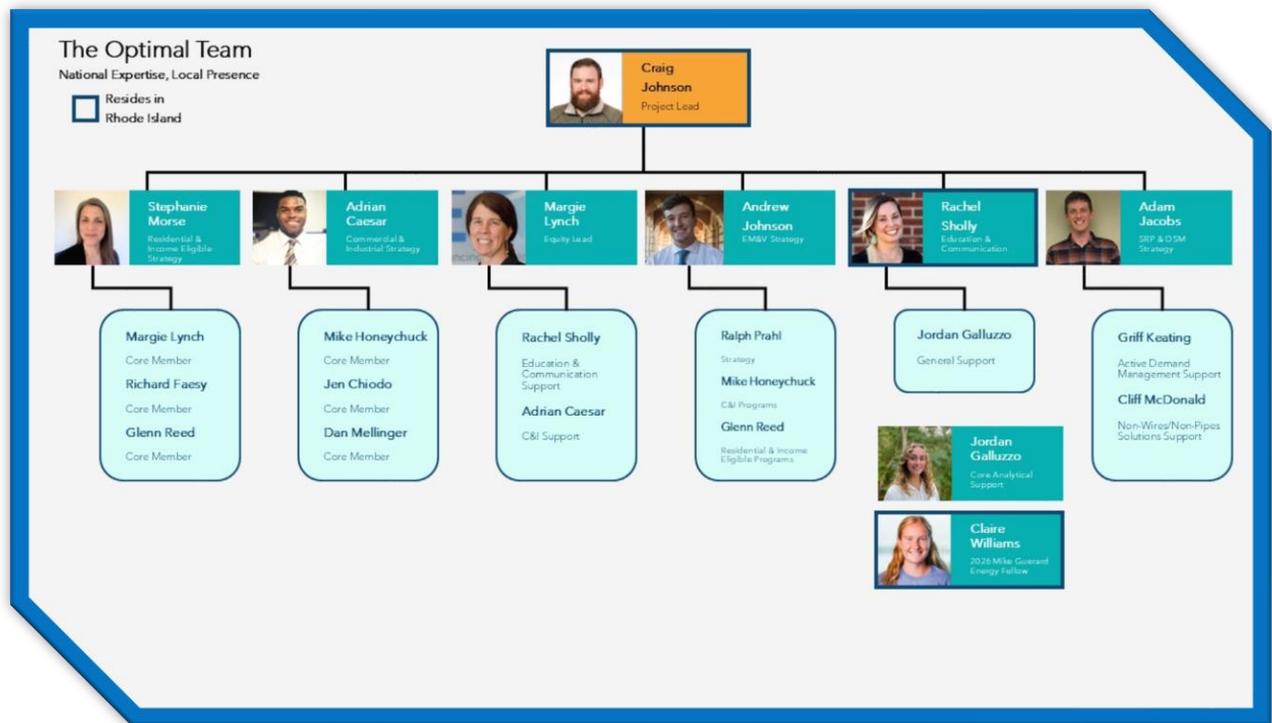
Council’s objectives and activities. For ~~2026~~2025, the C-Team has identified a candidate through the URI Energy Fellows Program.

III. STAFFING AND BUDGET

The Consultant Team will fully and effectively deliver all elements of this SOW. Work assignments and roles will remain flexible to ensure that the right staff, skillset, and availability are in place on all tasks, as well as to address evolving issues.

ORGANIZATIONAL CHART

Our staffing plan balances a core of members with proven track records, institutional knowledge, and well-established relationships while also enhancing and expanding the team to assure that evolving challenges and needs are addressed⁶. We organize our team into six groups covering the core roles and areas of focus, as shown in our organizational chart below. While each member may only be listed once or twice in their primary areas of concentration, many team members actively participate in multiple groups.



⁶ As in the past, Optimal may identify staff from our subcontractor firms and/or industry experts uniquely suited to support this scope of work, and will seek OER approval before adding resources not specifically named in the organizational chart.

BUDGET

In accordance with Article 3 of our existing contract with the Council, the C-Team agreed to holding hourly pricing firm through December 31, ~~2025~~2024, and is permitted to propose changes to said pricing after December 31, 2024. Since 2021, the C-Team has not updated its base billing rate aside from minor adjustments for inflation. ~~For~~In 2025, the C-Team proposed ~~s~~ and the Council approved ~~to~~ updates to its billing rates for the first time since 2021 (see table below) according to the table below⁷. Given pressure on the Council's overall budget and that this is the last year of the Council's contract with our team, we are proposing to maintain our rates from 2025 for 2026. ~~While the updated rates represent an increase compared to past years, we remain confident in our ability to be efficient and effective with our time while delivering on all tasks and deliverables contemplated in this SOW. Notably, our proposed hours that go along with these updated rates are approximately equal to the number of hours that were billed in 2024.~~

Title	Rate
Associate I / Project Coordinator I	\$166
Associate II / Project Coordinator II	\$182
Analyst I / Consultant I	\$201
Analyst II / Consultant II	\$214
Senior Analyst I / Senior Consultant I	\$230
Senior Analyst II / Consultant II	\$246
Analytics Lead / Senior Consultant III	\$262
Associate Director	\$278
Director	\$294
Senior Director	\$311

The C-Team also provides a list of rates by staff below. This list represents all known potential staff that the C-Team anticipates working on tasks included in this SOW. As noted in footnote 5, Optimal may identify additional staff from our team, subcontractor firms and/or industry experts uniquely suited to support this scope of work. The C-Team will share billing rates and seek approval from OER prior to adding these additional resources.

⁷ Note, this table only covers rate by title for the Optimal Energy team. Rates for our partner firms are provided in the staff table below.

Organization	Staff	Title	Rate
Optimal Energy, an NV5 Company	Craig Johnson	Senior Consultant I	\$230
	Gretchen Calcagni	Senior Director	\$311
	Matt Socks	Senior Director	\$311
	Cliff McDonald	Senior Consultant III	\$262
	Stephanie Morse	Senior Consultant I	\$230
	Adam Jacobs	Senior Consultant I	\$230
	Griff Keating	Consultant II	\$214
	Adrian Caesar	Consultant I	\$201
	Andrew Johnson	Analyst I	\$201
	Annalise Stein	Associate II	\$182
	Jordan Galluzzo	Associate I	\$166
	Melissa Persechini	Project Coordinator I	\$166
Energy Futures Group	Richard Faesy	Principal	\$275
	Dan Mellinger	Principal	\$275
EcoMetric Consulting	Salil Gogte	Partner	\$240
	Michael Honeychuck	Senior Managing Consultant	\$220
	Bitul Sinha	Managing Consultant	\$210
GDR Consulting	Glenn Reed	Consultant	\$235
JLC Consulting	Jennifer Chiodo	Consultant	\$215
Core Energy Insights	Margie Lynch	Consultant	\$225
Independent	Rachel Sholly	Consultant	\$170
	Ralph Prah	Consultant	\$236

The table below represents the C-Team’s proposed hours and budget for the work contained in this SOW. The C-Team’s budget is on a time-and-materials basis⁸ with a not-to-exceed maximum of \$700,000~~717,025~~⁹. If the C-Team is directed to conduct work that is considered out of scope, or that will lead to an overrun of the not-to-exceed amount, the C-Team will communicate this need and request Council approval before such work is started.

⁸ This is true with the exception of Task 7 – Council Intern. This line item, which will be billed as a fixed-fee item in even increments throughout the year, covers compensation paid to the intern, coordination fees charged by the University of Rhode Island’s Cooperative Extension as part of its Energy Fellows Program, and ongoing staff management and oversight of the intern by Optimal Energy staff.

⁹ The budget associated with this SOW does not include any external cost items (e.g. facility and catering costs for Council-sponsored events, website payments, etc.). Should the C-Team be required to cover such costs, it will coordinate with OER before incurring expenses. Pending OER’s approval, the C-Team will submit receipts and request reimbursement for such costs in its monthly invoice.

Tasks and Sub-Tasks	Hours	Budget
Task 1: Energy Efficiency Program Planning and Implementation Oversight	2,065	\$420,104
<i>Task 1.1: Council Representation</i>	60	\$13,087
<i>Task 1.2: Implementation Oversight and Plan Development</i>	1,800	\$371,512
<i>Task 1.3: Education Initiatives</i>	205	\$35,506
Task 2: System Reliability Procurement and Demand Side Management	105	\$24,225
<i>Task 2.1: Council Representation</i>	20	\$4,639
<i>Task 2.2: Implementation Oversight and Plan Development</i>	85	\$19,586
Task 3: Regulatory Proceedings	300	\$65,478
<i>Task 3.1: Council Representation</i>	50	\$10,815
<i>Task 3.2: Develop and Review Technical Materials</i>	250	\$54,663
Task 4: Council Sponsored Meetings and Materials	595	\$121,211
<i>Task 4.1: Meeting Attendance</i>	100	\$20,859
<i>Task 4.2: Develop Technical Materials</i>	375	\$78,996
<i>Task 4.3: Other Council Responsibilities</i>	120	\$21,356
Task 5: Research, Analysis, and Other Council Support	155	\$35,541
Task 6: Administrative	40	\$3,440
Task 7: Council Intern	600	\$30,000
Totals	3,860	\$700,000

Note: The Consultant Team only bills for hours actually worked up to the total approved budget.