

2027-2029 EE and SRP Plan Priorities

Consultant Team Presentation

Date: May 28, 2026

Outline



Background & Context

Updated Framework

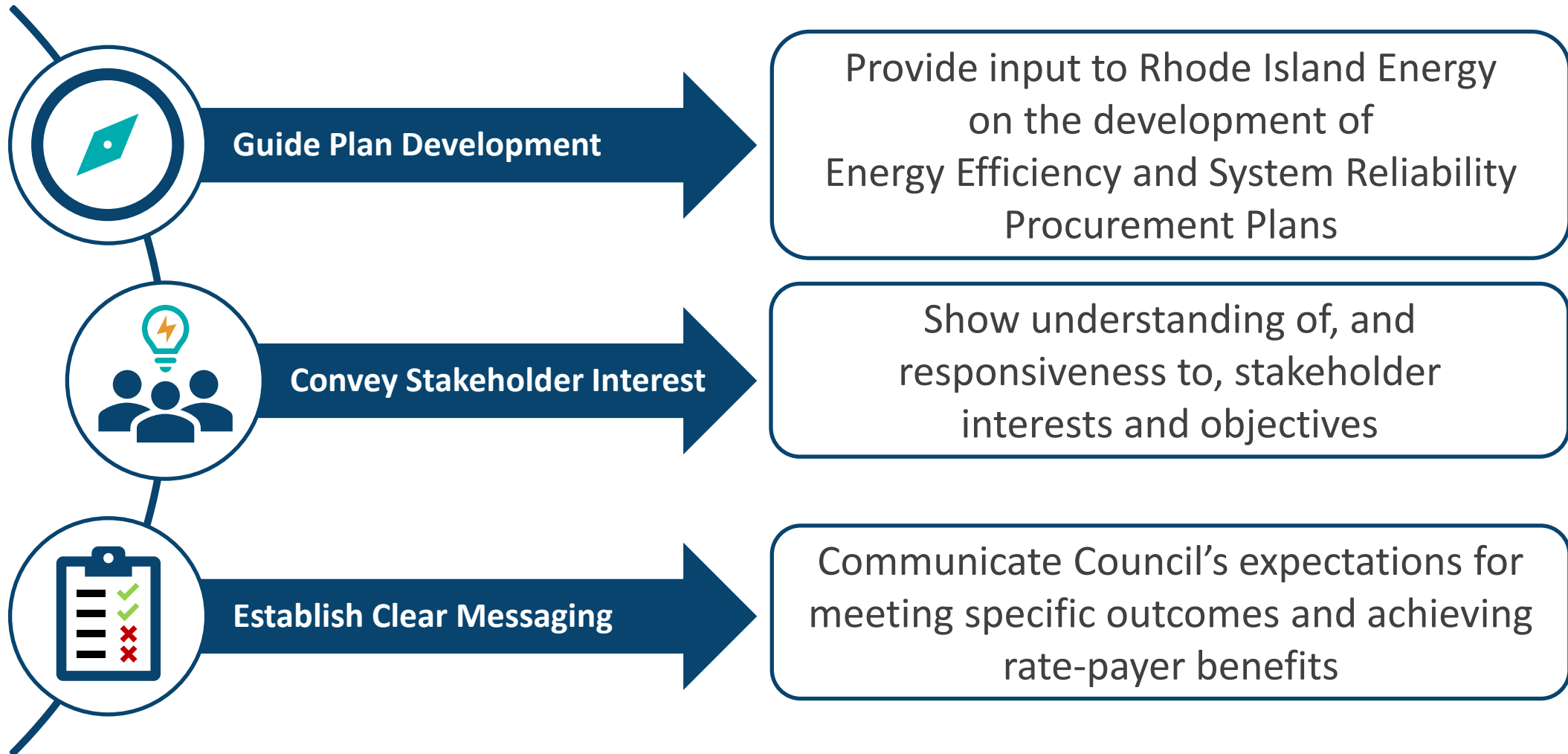
Proposed Priorities Content

Next Steps & Discussion



Background & Context

Why Set Plan Priorities?



How Are Priorities Used?



Stakeholder Communication

- Presented to Rhode Island Energy’s stakeholder engagement groups, known as Technical Working Groups

Plan Review

- Consistently referenced during C-Team review of Plan drafts and final versions

Regulatory Proceedings

- Often cited in regulatory proceedings in testimony and written comments

Discussion at April EEC Meeting



Binding Three-Year Plan presents opportunity for to rethink how Priorities are structured and utilized

Priorities should be more specific and targeted

- Specificity is actionable

Priorities should include a “Vision Statement”

- Importance of customer understanding EE charge on bill and value those funds provide



Updated Framework

Priorities Documents



50+ page full priorities document

- Three-Year Vision for EE & SRP Plans
- Core Strategic Principles
- Portfolio-Level & Cross-Cutting Priorities
- Program Design and Delivery
- Sector & Program Specific Priorities
- Evaluation, Measurement, and Verification
- System Reliability Procurement (SRP Plans, Investment Proposals, and Active Demand Response)

4 page executive summary memo

- Key themes and strategic direction
- Sample of focus areas
- How to use the full priorities document

Full Priorities Document



“This is too long, will anyone actually read this?”

“Do we really need this much detail?”

“How is RIE supposed to prioritize all of this?”

- First time developing priorities for a 3-year EE Plan
- Important to provide specificity at this stage
- Informed by detailed comments provided in prior plans
- Structured to support RIE teams responsible for developing Plan components

How Priorities are Communicated



Summary of section

- What it is
- why it is important

Key Priorities and Recommendations

- Numbered list
- Each numbered list includes specific set of expectations

Multifamily Programs

Multifamily buildings represent a significant and diverse segment of Rhode Island’s housing stock, including many income-eligible households and customers facing elevated energy burdens. As such, multifamily programs play an important role in advancing energy savings, affordability, and equity objectives across the portfolio.

The multifamily market includes a range of building types, ownership structures, and decision-making dynamics, which can influence how program strategies are designed and implemented.

The Council expects the 2027–2029 Plan to present a clear, cohesive, and data-informed strategy for the multifamily sector, including how programs are targeted, delivered, and evaluated across different segments of the market.

1. Develop a clear and integrated multifamily strategy

The Plan should provide a comprehensive and cohesive strategy for serving multifamily customers across both income-eligible and market-rate segments. This should include:

- Description of how the multifamily market is segmented (e.g., building size, ownership model, affordability status)
- Identification of priority segments based on opportunity and need
- Explanation of how different program offerings work together to serve these segments

Providing a clear strategic framework will support more coordinated and effective program delivery.

2. Strengthen use of existing data and targeting tools

The Council emphasizes the importance of leveraging existing data resources to support effective targeting in the multifamily sector. The Plan should:

- Describe how existing multifamily datasets (e.g., building databases or prior census efforts) are used to identify and prioritize buildings
- Identify any remaining gaps in data and the incremental value of proposed new data initiatives
- Avoid duplicative data collection efforts unless clearly justified



Proposed Priorities Content

Three-Year Vision for EE & SRP



Developed a vision statement that reflects both customer experience and system-level outcomes

“By the end of the 2027-2029 Plan period, the Council envisions a system in which customers can seamlessly move from understanding their energy use and costs to accessing and participating in programs that deliver clear, measurable, and sustained benefits.”

Core Strategic Principles



Data-driven decision making in support of ambition

Addressing the gap between climate objectives and investment

Increasing emphasis on SRP investments

Unique requirements of a first ever binding 3-year EE plan

Portfolio-Level & Cross-Cutting



[Equity and Access](#)

[Bill Impacts, value, and economic development benefits](#)

[Tradeoffs and constraints](#)

[Workforce development](#)

[Participation and outreach](#)

[Advanced metering infrastructure](#)

Program Design & Delivery



Overarching design and delivery

Residential & Income Eligible Programs

Commercial & Industrial Programs

Evaluation, Measurement, and Verification

System Reliability Procurement



[SRP Plans and Investment Proposals](#)

[Active Demand Response Programs](#)



Next Steps & Discussion

Next Steps



May: Council receives and discusses First Draft of 2027-2029 EE and SRP Plan Priorities with a potential to vote to adopt them

June: If necessary, Council discusses, refines and votes on 2027-2029 EE and SRP Plan Priorities

Council Discussion





Appendix

Core Strategic Principles

Core Strategic Principles



Data-driven decision making in support of ambition

Addressing the gap between climate objectives and investment

Increasing emphasis on SRP investments

Unique requirements of a first ever binding 3-year EE plan

Data-driven decision making in support of ambition



Council Expects:

- Savings goals will be ambitious and reflective of achievable potential, informed by historical performance, market conditions, and available opportunities
- The Plan will clearly document the basis for savings targets, including how data and assumptions were used to develop those targets
- Where savings or budgets are reduced relative to prior levels or demonstrated opportunity, the Plan will clearly explain the factors driving those changes, including any constraints or tradeoffs

Data should be used to identify:

- Opportunities to improve program design and delivery
- Untapped or underdeveloped market potential
- Strategies to increase participation and deepen savings

Core Strategic Principles



Data-driven decision making in support of ambition

Addressing the gap between climate objectives and investment

Increasing emphasis on SRP investments

Unique requirements of a first ever binding 3-year EE plan

Addressing the gap between climate objectives and investment



Plans should:

- Describe how energy efficiency and demand response programs are expected to contribute to emissions reductions over the Plan period, including the relationship between program savings and avoided emissions
- Provide an assessment of how proposed investments and anticipated outcomes compare to the level of effort and scale of impact identified in the Climate Action Plan for relevant sectors
- Identify any gaps between expected program impacts and the emissions reductions trajectory implied by the Climate Action Plan, and discuss the implications of those gaps

Where gaps are identified, Plans should:

- Describe potential pathways for addressing those gaps over time, including through increased investment, program design changes, or coordination with complementary initiatives
- Clearly articulate any constraints, tradeoffs, or external dependencies that limit the ability to fully align with the Climate Action Plan in the near term

Core Strategic Principles



Data-driven decision making in support of ambition

Addressing the gap between climate objectives and investment

Increasing emphasis on SRP investments

Unique requirements of a first ever binding 3-year EE plan

Increasing emphasis on SRP investments



Council expects evolution of SRP investments from largely demand response offerings to a strategic approach that:

- Identifies specific system needs and constraints and matches them with appropriately designed demand-side solutions
- Prioritizes customer segments, technologies, and locations that provide the greatest system value
- Leverages available data, including AMI and system planning information, to inform targeting and program design

Core Strategic Principles



Data-driven decision making in support of ambition

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Appendix

Portfolio-Level & Cross-Cutting

Portfolio-Level & Cross-Cutting



Equity and Access

Bill Impacts, value, and economic development benefits

Tradeoffs and constraints

Workforce development

Participation and outreach

Advanced metering infrastructure

Equity and Access



1. Strengthen measurement of equity outcomes
2. Embed equity considerations within program design
3. Incorporate equity into targeting and customer identification
4. Enhance transparency of equity-related data and findings
5. Strengthen integration of evaluation and advisory inputs
6. Evaluate and strengthen community partnerships
7. Incorporate workforce diversification considerations

Portfolio-Level & Cross-Cutting



Equity and Access

Bill Impacts, value, and economic development benefits

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Bill Impacts, value, and economic development benefits



1. Provide comprehensive, transparent, and well-communicated bill impact analysis
2. Connect bill impacts to customer experience and program outcomes
3. Clarify and consistently apply the concept of value
4. Re-evaluate the treatment of economic development benefits

Portfolio-Level & Cross-Cutting



Equity and Access

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Tradeoffs and constraints



1. Clearly describe constraints and decision drivers
2. Identify and characterize unrealized opportunities
3. Explain tradeoffs and their implications
4. Provide transparency to support informed decision-making

Portfolio-Level & Cross-Cutting



Equity and Access

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Workforce development



1. Define workforce needs and align with program requirements
2. Utilize measurable workforce metrics and track performance
3. Demonstrate evaluation and continuous improvement of workforce initiatives
4. Ensure training content remains relevant and comprehensive
5. Support workforce pipeline development and accessibility
6. Incorporate equity and diversity considerations in workforce development

Portfolio-Level & Cross-Cutting



Equity and Access

Bill Impacts, value, and economic development benefits

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Workforce development

Participation and outreach

Advanced metering infrastructure

Participation and outreach



1. Improve customer entry points and overall user experience
2. Develop targeted and proactive outreach strategies
3. Enhance transparency through public-facing tools and reporting

Portfolio-Level & Cross-Cutting



Equity and Access

Bill Impacts, value, and economic development benefits

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Participation and outreach

Advanced metering infrastructure

Advanced metering infrastructure



1. Provide a phased and practical roadmap for AMI integration
2. Prioritize high-value and near-term use cases
3. Integrate AMI into participation, program design, and delivery
4. Leverage AMI to support demand response and system objectives
5. Incorporate AMI into evaluation, measurement, and verification
6. Define expected outcomes and metrics associated with integrating AMI



Appendix

Program Design and Delivery

Program Design & Delivery



Overarching design and delivery

Residential & Income Eligible Programs

Commercial & Industrial Programs

Evaluation, Measurement, and Verification

Overarching design and delivery



1. Provide clear and consistent program descriptions
2. Define implementation pathways and key activities
3. Integrate performance metrics and success indicators
4. Incorporate evaluation findings and prior experience
5. Align program design with cross-cutting priorities
6. Ensure clarity on program evolution over the Plan period

Program Design & Delivery



Overarching design and delivery

Residential & Income Eligible Programs

Commercial & Industrial Programs

Evaluation, Measurement, and Verification

Residential & Income Eligible – Pre-Weatherization and Barrier Remediation



1. Establish a comprehensive and scalable strategy for addressing barriers
2. Leverage and align multiple funding sources
3. Provide a coordinated and seamless customer experience
4. Integrate barrier remediation into core program design
5. Improve data collection and tracking of barriers and outcomes
6. Align with broader housing and policy initiatives

Residential & Income Eligible – EnergyWise Single Family



1. Strengthen the role of EnergyWise as a primary entry point
2. Provide clarity on audit-to-installation pathways and outcomes
3. Address depth and comprehensiveness of interventions
4. Leverage data-driven targeting to reach high-impact customers
5. Integrate EnergyWise with electrification and HVAC programs
6. Enhance consistency and quality of program delivery
7. Strengthen use of data and feedback loops
8. Clarify relationship to other residential program pathways

Residential & Income Eligible – Income Eligible Single Family



1. Prioritize comprehensive treatment and meaningful bill impacts
2. Strengthen integration with pre-weatherization and barrier remediation
3. Improve targeting and prioritization of high-burden households
4. Incorporate outcome-based metrics and performance tracking
5. Enhance integration with electrification opportunities
6. Improve customer experience and accessibility
7. Ensure consistency and quality of program delivery
8. Align with broader affordability and housing initiatives

Residential & Income Eligible – Multifamily Programs



1. Develop a clear and integrated multifamily strategy
2. Strengthen use of existing data and targeting tools
3. Enhance outreach and engagement strategies for property owners and managers
4. Address split incentives and financial barriers
5. Provide clarity on scope and depth of interventions
6. Strengthen performance tracking and outcome-based metrics

Residential & Income Eligible – HVAC and Hot Water



1. Develop a clear and coordinated approach to electrification
2. Strengthen targeting of high-opportunity customers
3. Expand use of upstream and midstream delivery strategies
4. Improve integration with other program entry points
5. Address cost and affordability considerations
6. Align program design with long-term emissions reductions mandates
7. Expand emerging and underutilized technologies
8. Clarify program structure, delivery, and evolution

Residential & Income Eligible – Consumer Products



1. Expand the use of upstream and midstream delivery channels
2. Assess the effectiveness of the online marketplace
3. Support participation and customer engagement
4. Ensure alignment with other program offerings
5. Maintain relevance of product offerings

Residential & Income Eligible – New Construction



1. Align program design with State policy goals and establish a pathway toward an all-electric new construction program
2. Clarify relationship to building codes and evolving market baselines
3. Support market readiness for high-performance and net-zero buildings
4. Engage builders, developers, and design professionals

Residential & Income Eligible – Behavior Programs



1. Clarify the future role of behavioral programs
2. Define and implement a strategy for next-generation behavioral programs
3. Maintain a balanced approach between continuity and innovation
4. Strengthen integration with other program objectives

Program Design & Delivery



Overarching design and delivery

Residential & Income Eligible Programs

Commercial & Industrial Programs

Evaluation, Measurement, and Verification

C&I Programs – Custom Offerings



1. Address process complexity and reduce project development barriers
2. Improve project timelines and clarity for customers
3. Strengthen alignment with customer decision-making and capital cycles
4. Enhance delivery models and program management
5. Integrate evaluation findings into program design
6. Support deeper, system-level savings opportunities
7. Improve tracking of project pipeline and outcomes

C&I Programs – Lighting and Controls



1. Reframe lighting as a platform for controls and system optimization
2. Expand and prioritize advanced lighting controls
3. Ensure accurate characterization and valuation of controls savings
4. Address remaining LED-to-LED optimization opportunities
5. Integrate lighting with broader building systems and programs
6. Align lighting programs with demand response and system needs
7. Clarify program structure and evolution
8. Strengthen performance tracking and forward-looking planning

C&I Programs – Commissioning, Optimization, and EBCx



1. Establish a dedicated and comprehensive EBCx program
2. Strengthen program management, oversight, and delivery consistency
3. Clarify the customer journey and implementation pathway
4. Integrate EBCx with custom programs and other C&I offerings
5. Leverage data, analytics, and AMI capabilities
6. Support persistence of savings and continuous optimization
7. Align commissioning and optimization with system and demand response objectives

C&I Programs – Small Business



1. Shift from participation counts to participation rates and market reach
2. Improve targeting and outreach strategies
3. Strengthen coordination with external partners
4. Enhance delivery pathways and reduce customer friction
5. Increase depth and impact of interventions
6. Clarify program evolution and response to prior findings

Program Design & Delivery



Overarching design and delivery

Residential & Income Eligible Programs

Commercial & Industrial Programs

Evaluation, Measurement, and Verification

Evaluation, Measurement, and Verification



1. Strengthen the feedback loop between EM&V and program design
2. Establish a formal tracking framework for evaluation recommendations
3. Improve transparency in study selection and prioritization
4. Leverage AMI and advanced data capabilities in EM&V
5. Support adaptive management within a three-year plan structure



Appendix

System Reliability Procurement

Priorities for SRP Framework



Ensure that the SRP Plan establishes a clear, transparent, and analytically sound foundation for evaluating resources

Support the development of targeted, high-impact demand response programs as a core component of SRP activity

Promote alignment and integration between SRP investments and energy efficiency programs, recognizing that these resources are complementary components of a unified demand-side portfolio

System Reliability Procurement



SRP Plans and Investment Proposals

Active Demand Response Programs

SRP Plans and Investment Proposals



1. Ensure a clear linkage between SRP analysis and actionable investment pathways
2. Ensure robust consideration of non-wires and non-pipes alternatives
3. Address structural and process factors that influence investment decisions
4. Advance demand-side resources as system solutions
5. Support development of virtual power plants and aggregated resources
6. Provide transparency into analytical methods and assumptions
7. Track outcomes and refine approaches over time

System Reliability Procurement



SRP Plans and Investment Proposals

Active Demand Response Programs

Active Demand Response Programs



1. Adopt a targeted, segment-specific program design
2. Leverage AMI and interval data for targeting and performance
3. Integrate demand response with energy efficiency programs
4. Define clear performance expectations and accountability mechanisms
5. Balance incentives with cost-effectiveness and long-term sustainability
6. Expand the portfolio of demand response offerings