M E M O

CONSULTANT TEAM

TO: Energy Efficiency Council
FROM: EEC Consultant Team
CC: Office of Energy Resources
DATE: October 15, 2026
RE: October 15th EEC Meeting Briefing Memo

PURPOSE OF BRIEFING MEMO

The purpose of this briefing memo is to assist members of the Energy Efficiency Council[1] 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. PRESENTATIONS ON THE FINAL DRAFT OF THE 2027-2029 THREE-YEAR SYSTEM RELIABILITY PROCUREMENT (SRP) PLAN AND THE 2027-2029 THREE-YEAR CONNECTEDSOLUTIONS PLAN

Key Considerations

- Rhode Island Energy will present the final drafts of the 2027-2029 SRP Plan and 2027-2029 Three-Year ConnectedSolutions Investment Proposal
- The Council's C-Team will provide an assessment of the alignment of the final drafts of the plans with the Least Cost Procurement (LCP) Standards and Council's priorities
- C-Team's Overall Assessment of the SRP Plan:
    - Partially Responsive to the LCP Standards:
        - SRP needs identified in Plan largely align with the LCP standards, but;
        - No way to assess SRP opportunities that RIE deemed more costly than traditional Utility Reliability Procurement (URP)
    - Not responsive to Council Priorities:
        - Process relies on the Company self-identifying and bringing forward non-wire alternative (NWA) and non-pipeline alternative (NPA) projects with no

[1] 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.

opportunities earlier in process for stakeholder input in identification and initial screening for NWS opportunities
        - Less ambitious vision than 2024-2026 SRP plan for using AMI and grid mod investments to target grid constraints and avoid infrastructure investments through demand side resources
- C-Team's Overall Assessment of ConnectedSolutions
    - Largely Responsive to the Least Cost Procurement (LCP) Standards:
        - ConnectedSolutions is lower than the cost of additional capacity (URP) to meet peak demand and meets all other standards
    - Partially responsive to Council Priorities:
        - Increased savings and participation compared to 2024-2026 plan and current actuals across all pathways
        - Company is not proposing any targeted demand response offerings in constrained areas of the grid
        - Company is utilizing outdated avoided cost information as a key input to set incentive levels

Discussion Questions

- What information does the Council feel like it still needs to better understand before considering its vote?
- Do Councilors feel like the Plan and Proposal make good faith efforts to address Council priorities?
- Is there anything the Council would like to prioritize during regulatory review of the SRP Plan or Investment Proposal?

Intended Outcomes

- Vote on whether to endorse the Three-Year SRP Plan (see section 6B below for vote options)
- Vote on whether to endorse the Three-Year ConnectedSolutions Proposal (see section 6C below for vote options)

Council Actions

Required Vote | Potential Vote | No Vote

6B. COUNCIL VOTE ON THE FINAL DRAFT OF THE 2027-2029 THREE-YEAR SRP PROPSAL

Recommended Vote Language

1. Endorse the 2027-2029 Plan: A motion to endorse the 2027-2029 Three-Year SRP Plan as presented by the Rhode Island Energy to the Council on October 15, 2026, allowing for non-substantive changes (typos, etc.) to be done prior to filing.

2. Endorse the 2027-2029 Plan with conditions: A motion to endorse the 2027-2029 Three-Year SRP Plan as presented by the Rhode Island Energy to the Council on October 15, 2026 should it meet the following condition(s): *{state conditions(s)}*

3. Not endorse the 2027-2029 Plan: A motion to not endorse, at this time, the 2027-2029 Three-Year SRP Plan as presented by the Rhode Island Energy to the Council on October 15, 2026.

   Furthermore, the Council directs its Consultant Team and legal counsel to document the Council's reasons for not endorsing and to submit those to the PUC for its consideration in final review of the 2027-2029 Three-Year SRP Plan.

Council Actions

Required Vote	Potential Vote	No Vote

6C. COUNCIL VOTE ON THE FINAL DRAFT OF THE 2027-2029 THREE-YEAR CONNECTEDSOLUTIONS PROPOSAL

Recommended Vote Language

1. Endorse the 2027-2029 Proposal: A motion to endorse the 2027-2029 Three-Year ConnectedSolutions Proposal as presented by the Rhode Island Energy to the Council on October 15, 2026, allowing for non-substantive changes (typos, etc.) to be done prior to filing.

2. Endorse the 2027-2029 Proposal with conditions: A motion to endorse the 2027-2029 Three-Year ConnectedSolutions Proposal as presented by the Rhode Island Energy to the Council on October 15, 2026 should it meet the following condition(s): *{state conditions(s)}*

3. Not endorse the 2027-2029 Proposal: A motion to not endorse, at this time, the 2027-2029 Three-Year ConnectedSolutions Proposal as presented by the Rhode Island Energy to the Council on October 15, 2026. Furthermore, the Council directs its Consultant Team and legal counsel to document the Council's reasons for not endorsing and to submit those to the PUC for its consideration in final review of the 2027-2029 Three-Year ConnectedSolutions Proposal.

4. Abstain from taking a position in the 2027-2029 Proposal: A motion to abstain, at this time, from taking a position on the 2027-2029 Three-Year ConnectedSolutions Proposal as presented by the Rhode Island Energy to the Council on October 15, 2026.

Council Actions

Required Vote | Potential Vote | No Vote

6D. PRESENTATION AND DISCUSSION OF RHODE ISLAND ENERGY'S DEMAND SIDE MANAGEMENT ("DSM") INVESTMENT PROPOSAL

Key Considerations

- Rhode Island Energy and the Conservation Law Foundation will present on their DSM Investment Proposal
- The presentation will review the methodology, assumptions, and the proposed timeline for the 2026 DSM Proposal
- The Council's C-Team will provide comments on the alignment of the DSM Investment Proposal with the Council's priorities
- There is flexibility within DSM Proposals to reduce energy costs outside of traditional energy efficiency framework (e.g., decarbonization, discounted heat pump rates)
- Like EE plans, the Council shall vote whether to endorse/not endorse DSM Proposals

Discussion Questions

- Do you feel you understand the intent behind Chapter 7 and DSM Proposals overall?
- Does the Council need any clarification on the guidelines for DSM proposals or its responsibilities?
- Do Councilor's feel the DSM Investment Proposal aligns with the Council's priorities?

Intended Outcomes

- Understand the purpose of Chapter 7 of the LCP Standards and DSM Proposals
- Vet the methodology and assumptions behind the Company's DSM proposal for a bill credit for new heat pump users
- Discuss the alignment between the DSM Investment Proposal and the Council's priorities

Council Actions

Required Vote | Potential Vote | No Vote

7. COUNCIL BUSINESS

7A. DISCUSSION OF THE COUNCIL'S COMMENTS AND APPROACH FOR ENGAGEMENT IN THE ENERGY EFFICINCY PLAN DOCKET PROCEEDINGS

Key Considerations

- The Council's C-Team will lead a discussion to gather any comments or feedback on the 2027-2029 Energy Efficiency Plan that the Council would like to share during the docket proceedings and summarize any other filing requirements from the Council
- Opportunities for Council input include:
    - Data Requests
    - Pre-Filed Testimony
    - Recommendations/Requested Approvals
- The Council Budget Testimony is due October 20, 2026
- The Council Energy Efficiency Testimony is due November 3, 2026
- The Council's C-Team will work with Council leadership and the legal team to draft and submit pre-filed testimony in accordance with the Docket procedural schedule
- The Council's C-Team will also support individual Councilor testimony, as needed, and will issue and respond to any appropriate data requests

Discussion Questions

- Is there anything beyond avoided costs and mid-term modifications (MTMs) the Council would like to raise during regulatory review of the EE plan?
- Which Councilor(s) would like to provide testimony on the Council's behalf during the EE Plan hearings?

Intended Outcomes

- Discuss the various opportunities for Council input in the PUC Docket 26-37-EE 2027-2029 Energy Efficiency Plan Proceedings
- Understand the PUC Docket 26-37-EE 2027-2029 Energy Efficiency Plan Procedural Scheule
- Consider which Councilor(s) would like to provide testimony on the Council's behalf during the hearings
- Reach consensus on content included in Council testimony in Docket 26-37-EE

Council Actions

Required Vote | Potential Vote | **No Vote**

7B. DISCUSSION AND POTENTIAL VOTE ON UPDATES TO THE COUNCIL'S 2026 BUDGET AND 2027-2029 BUDGET PROPOSAL

Key Considerations

- The Council may vote to update its 2026 budget and budget proposal included in the 2027-2029 Plan

    - Recap: Council vote on the 2027-2029 budget proposal in September included language stating that the Council would update the proposal as it gets new information regarding the cost of third-party services in late 2026
- This discussion will inform OER's development of the Council's budget testimony, which will characterize the process through which the Council budgeted for 2027-2029

Discussion Questions

- Does the Council have any proposed modifications to the 2027-2029 budget proposal?

Intended Outcomes

- Discuss any adjustments to the 2026 budget or 2027-2029 budget proposal for inclusion in the 2027-2029 Plan
- Support OER's development of the Council's budget testimony, for inclusion in Docket 26-37-EE 2027-2029 Energy Efficiency Plan

Council Actions

Required Vote | Potential Vote | No Vote

7C. VOTE TO APPOINT COUNCIL MEMBERS TO THE CONSULTANT SERVICES RFP TECHNICAL REVIEW COMMITTEE

Key Considerations

- The Council will vote to appoint members to the Technical Review Committee for Consultant Service proposals

Council Actions

Required Vote | Potential Vote | No Vote

SUPPLEMENTAL MATERIALS

COUNCIL BUDGET TRACKER

OER has provided an update to the 2026 Council budget tracker, which includes spending through Q2 2026 and pending payments for October 2026.

DRAFT NOVEMBER COUNCIL MEETING AGENDA

OER has provided an initial draft of the meeting agenda for the Council's November 19, 2026 meeting. Councilors are welcome and encouraged to provide feedback.

COUNCIL CALENDAR OF EVENTS

The Consultant Team has provided a 2026 version of the Council's Calendar of Events which includes meeting dates, topics, and proposed milestones for planning activities related to the 2027-2029 EE Plan.

MONTHLY DATA SNAPSHOTS

The Consultant Team has provided monthly data snapshots which include several visuals to display lifetime savings and spending achieved through the month of September, relative to plan goals.

Residential Sector Takeaways

1. Through September, Residential electric and gas programs have achieved 46% and 59% of their lifetime savings goals. Income Eligible electric and gas programs have achieved 19% and 29% of their lifetime savings goals.
2. Electric Income Eligible spending is ahead of the pace necessary to meet budget. This is largely due to a steep increase in spending in the Income Eligible Multifamily (IEMF) Program, which has now spent 146% of its budget for the year.
3. While electric IEMF spending has steadily increased since May, savings are still lagging, with only 29% of the lifetime savings goal realized to date.
4. The EnergyWise Multifamily program continues to underperform in both electric and gas portfolios, with just 29% and 13% of the lifetime savings goals realized.
5. Residential New Construction continues to show strong performance, especially for electric savings, with 115% of the lifetime savings goal realized and 87% of the budget spent through September.

Commercial & Industrial (C&I) Sector Takeaways

1. Through September, C&I electric and gas programs have achieved 60% and 48% of their lifetime electric and gas savings goals, respectively.
2. C&I electric and gas programs have spent 61% and 56% of the budget to date.
3. C&I Retrofit shows strong performance in both electric and gas portfolios, with 69% and 85% of the lifetime savings goals realized.
4. The Small Business program in the electric portfolio has 63% of the budget spent with only 45% of the lifetime savings goal realized through August.
5. The C&I Multifamily program is underperforming in the gas portfolio with just 9% of the lifetime savings goal realized and only 16% of the budget spent through September. Performance in this program is typically dependent on the completion of larger projects toward the end of each year.