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April 24, 2023

Luly E. Massaro, Clerk
Public Utilities Commission
89 Jefferson Boulevard
Warwick, RI 02888

Re: Block Island Utility District d/b/a Block Island Power Company
Demand Side Management 2023

Dear Luly,

As you know, our office represents Block Island Utility District ("BIUD").

Enclosed for filing please find BIUD's Demand Side Management 2023 Plan with supporting documentation.

This submission includes an original and five (5) copies of the following:

- Direct Testimony of Jeffery M. Wright, with supporting schedules
- Joint Direct Testimony of Noel M. Chambers and Sarah Doherty of Energy New England
  - Attachment ENE-1: BIUD's Demand Side Management 2023 Plan
  - Attachment ENE-2: Resume of Noel M. Chambers
  - Attachment ENE-3: Resume of Sarah Doherty

If you need any further information, please do not hesitate to contact me.

Very truly yours,

Leah J. Donaldson

Cc: Service List for PUC 5244 (via electronic mail)

Docket No. 5244 – Block Island Utility District - Demand Side Mgmt.
Service List as of 3/31/2022

Name/Address	Email	Phone
Block Island Utility District (BIUD) Michael McElroy, Esq. Leah J. Donaldson, Esq. McElroy & Donaldson 3 Cedar Meadows Drive Smithfield, RI 02917	Michael@McElroyLawOffice.com; leah@mcelroylawoffice.com;	401-351-4100
David Bebyn	dbebyn@beconsulting.biz;	
Katherine Johnson	kjohnson@johnsonconsults.com;	
Jake Millette	JBMillette@michaelsenergy.com;	
Jeffery Wright, President Barbara MacMullan	jwright@blockislandutilitydistrict.com; bamacmullan@gmail.com;	401-466-5851
Division of Public Utilities (Division) Mark A. Simpkins, Esq.	Mark.A.Simpkins@dpuc.ri.gov; Margaret.L.Hogan@dpuc.ri.gov; Christy.Hetherington@dpuc.ri.gov; egolde@riag.ri.gov;	401-274-4400 Ext. 2425
John Bell, Chief Accountant	John.bell@dpuc.ri.gov; Joel.munoz@dpuc.ri.gov;	
File an original & nine (9) copies w/: Luly E. Massaro, Commission Clerk Cynthia Wilson Frias, Counsel **Public Utilities Commission** 89 Jefferson Blvd. Warwick, RI 02888	Luly.massaro@puc.ri.gov; Cynthia.WilsonFrias@puc.ri.gov; Christopher.M.Smith@puc.ri.gov; Alan.nault@puc.ri.gov; emma.rodvien@puc.ri.gov;	401-780-2107
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Kathleen Merolla, Esq.	KAMLAW2344@aol.com;	
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Direct Testimony

of

Jeffery M. Wright

_____

for

Block Island Utility District DBA Block Island Power Company

Docket No. _____

April 22, 2023

Q. Please state your name and business address for the record.

A. My name is Jeffery M. Wright. My principal business address is 100 Ocean Avenue, Block Island, Rhode Island 02807.

Q. By whom are you employed and in what capacity?

A. I am the President of the Block Island Utility District DBA Block Island Power Company ("BIUD").

Q. Can you please describe your education and experience?

A. I have an Associate Degree in Accounting and have worked for electric utilities since 1984 in various roles.

Prior to working for the Block Island Power Company, I was the Chief Operating Officer at the Vermont Electric Cooperative ("VEC") from 2008-2016. VEC is the state's second-largest utility and largest electric cooperative which serves approximately 40,000 electric meters across the northern third of the state of Vermont. I was responsible for all of the company's operations including transmission and distribution operations, substations and system operations, and engineering. I worked closely with the company's CFO in developing long capital plans, long-range financial forecasting, and supported several rate cases.

Prior to working for VEC, I worked at the Vermont Electric Power Company from 1996-2008. I was a member of the company's Senior Leadership Team and was responsible for managing the company's assets which included over 35 high-voltage transmission substations, more than 700 miles of high-voltage transmission lines, all rights of way, and the company's facilities and fleet assets. I also managed the assets of the Vermont Electric Transmission Company which owns and maintains Vermont's portion of the 450 kV DC "Phase One" line.

I am also a member of the National Rural Electric Cooperatives Association Board of Directors representing Rhode Island. I serve on the Business Technologies and Strategies sub-committee.

NRECA represents more than 900 consumer-owned, not-for-profit electric cooperatives, public power districts, and public utility districts in the United States. The Arlington, Va.-based national service organization oversees cooperative employee benefits plans; carries out federal government relations activities like lobbying; conducts management and director training; and spearheads communications, advocacy, and public relations initiatives. In addition, it coordinates national and regional conferences and seminars; offers member cooperatives advice on tax, legal, environmental, and engineering matters; and performs economic and technical research.

Q. What is the purpose of your testimony?

A. The purpose of my testimony is to provide information in support of BIUD's efficiency plan filing for the plan year 2023/24.

Q. How much did BIUD spend during the 2022/23 plan year?

A. During the period of June 1, 2022 through March 2023, BIUD spent $31,453.56 in the following categories:

- Program Administration – Johnson Consulting, $15,789.56
- Direct Installs, Audits and Admin – Energy New England, $12,414.00
- Consumer Rebates, $3,250.00
- Member Outreach, all outreach efforts were done at no expense. They included annual meeting demos, community bulletin board posts, and word of mouth.

Q. Is BIUD seeking rate funding for the 2023/24 plan?

A. No.

Q. Has BIUD invoiced the Rhode Island Office of Energy Resources ("RI-OER") for reimbursement from the RGGI fund?

A. Yes. BIUD invoiced RI-OER $12,596 for activity in Q3 and Q4 2022, and $4,808 for activity in Q1 2023. The activities included member rebates, direct installs, audits, travel expenses, and admin fees. The only program expenses that are not being reimbursed by RI-OER are the administration expenses billed by Johnson Consulting.

Q. Has BIUD provided a detailed schedule of program expenses and revenues?

A. Yes. David Bebyn, CPA prepared a schedule of expenses and revenue which included the remaining balance of funding collected in rates in previous years. Schedules 1 and 2 are attached.

Q. Has BIUD made any changes to the administration of the 2023/34 plan?

A. Yes. The most significant change has been the termination of our contract with Johnson Consulting in November 2022. BIUD has since contracted with Energy New England ("ENE") to administer the program in its entirety. BIUD and ENE will continue to work closely with RI-OER.

Q. Has BIUD made any changes to the programs, services, and offerings within the 2023/34 plan?

A. There are some subtle changes that ENE is recommending which have been included in the 2023/324 plan. Pre-filed testimony from the ENE team is included in this filing.

Q. Do you feel that the program is providing value to BIUD's members and are those who are utilizing it finding value in it?

A. Yes. Without a doubt, those who have taken advantage of the audits and direct installations have found value in the program. This feedback has been given to me directly by those who have benefitted from the program. There was one commercial audit performed this past year as well and the business owner also provided positive feedback.

Q. BIUD has previously testified that finding qualified contractors to perform work recommended in the audits is problematic. Has that improved at all?

A. No. The island is very busy with new construction and finding labor resources to do weatherization and HVAC installations continues to be a challenge.

Q. Is the Block Island Solar Initiative still performing HVAC installations?

A. Yes, but at a very slow rate. It is my understanding that they installed less than 10 systems last summer.

Q. Has BIUD performed any analysis of the effects on annual electric usage and peak demands after installation of a mini-split heat pump?

A. BIUD has recently transitioned from oil furnace heating and window/floor mount air conditioning to all mini-split heat pump heating/cooling in the office building. We now rely entirely on four condensers and seven distribution heads to heat and cool all three floors of the office building. The summer-time peak demand at the BIUD office building has not increased at all due to the change. It was 10.084 kW in 2019 and 10.226 kW in 2022. BIUD's winter-time peak has increased however, from 7.675 kW in 2019 to 13.422 kW in 2023.

We also analyzed winter usage and summer usage. During the winter period (January-March), BIUD used 3,703 kWh of energy in 2023 compared to 1,570 kWh in 2019. Not taking into consideration changing power supply and transmission rates, the electric bills for this period totaled $1,729.98 in 2023 compared to $885.99 for the same period in 2019; an increase of $843.99. BIUD's fuel oil expense for these three months in 2019 was $950.92 spent on 375.4 gallons compared to $0 in 2023. The price of fuel in 2019 ranged between $2.39 and $3.08 per gallon.

During the summer period (June-August), BIUD used 2,094 kWh of energy in 2022 compared to 3,966 kWh in 2019; a reduction of approximately half. Not taking into consideration changing power supply and transmission rates, the electric bills for this

period total $1,164.80 in 2023 compared to $2,497.99 for the same period in 2019; a reduction of more than half.

I realize this analysis is not comprehensive or scientific but I believe it does validate two patterns of usage and demand; 1) clearly, mini-split heat pumps are far more efficient in the summertime than their counterpart window and floor mount air conditions, and 2) while they do lead to increased electric usage and demand in the winter months, they are cost-effective to heat within the winter months.

Q. Does BIUD plan to further analyze the effects of HVAC on its distribution system?

A. No. BIUD is not seeing any significant increase in winter or summer peaks despite nearly 100 recent installations of mini-split heat pumps in our system.

In 2019, BIUD's winter peak was 1.864 kW compared to 2.256 kW in 2023. Although there is a small increase due to what we believe is an increase in mini-split heat pump load it is not significant in terms of distribution capacity.

BIUD's summertime peaks have also increased only slightly over the past six years. The matrix shown on the following page shows the summertime peak trend.

ISO-NE PEAKS AND BIPCO COINCIDENTAL PEAKS					BIPCO NON-COINCIDENTAL PEAKS			
Date	Day	Hour	System Peak Load (MW)	BIUD Coincidental Load (MW)	BIUD Peak Day/Date	Day	Hour	BIUD Summer Peak (MW)
6/13/2017	Tue	17	23,508	2.314	7/20/2017	Thu	21	4.193
8/29/2018	Wed	17	25,528	3.867	8/17/2018	Thu	20	4.831
7/30/2019	Tue	19	23,973	4.647	7/20/2019	Sat	19	5.082
7/27/2020	Mon	18	24,695	4.435	7/30/2020	Thu	19	4.749
7/16/2021	Fri	18	22,365	4.753	7/17/2021	Sat	19	5.280
7/20/2022	Wed	19	24,290	4.643	7/22/2022	Fri	19	5.294

Based on our analysis of mini-split heat demand during the summer months, I believe that they have helped mitigate what could have been a higher increase in peak summer loads from increased air conditioning load in general. Undisputedly, improved power quality and stable electric prices on the island have increased electric usage in general on

the island. Using BIUD's office as an example, the replacement of window and floor mount air conditioning units has reduced our summertime peak demand and cut our usage nearly in half during June, July, and August.

At this point in time, we are more concerned with an increase in electric vehicle ("EV") charging loads during our summertime peak than any small effects from summertime air conditioning load.

Q. What is BIUD planning to do to mitigate a sudden increase in EV charging load, especially during summertime peak hours?

A. BIUD is aware of four Level II chargers that have been installed on residential services. We are also in the process of connecting a Level III charger owned and operated by the Block Island Solar Initiative ("BISI").

In terms of managing Level II charging loads, we are contemplating the implementation of an incentive for allowing BIUD to control the charger during peak times. I am aware of some cooperatives that have implemented a monthly bill credit (based on avoided capacity and transmission costs) in exchange for allowing the cooperative to control the charge using Wi-Fi. Block Island recently finished an $8M fiber-to-the-home project so Wi-Fi should be a reliable way to communicate with chargers. This is an advantage Block Island has over other rural distribution providers.

ENE currently offers a demand response program that Block Island could use to manage Level II EV charging loads in addition to other appliances. We are in discussions with ENE now.

Although managing the Levell III loads may also be difficult to manage, we are working with the BISI to consider time-of-use rates for charging to help us avoid use during peak periods. They will fall into our General Service Demand tariff but have the flexibility to implement rates to meet their costs and to discourage charging during peak hours.

Q. Does this complete your pre-filed direct testimony?

A. Yes, it does.

Proposed Efficiency Rates for FY 23/24
Block Island Power Company

Schedule-1

Efficiency Program Rates

Total Program Costs	32,400	
Less Over Collections		
2023 Reconciliation	28,464	A (See Schedule 2)
Subtotal	3,936	

Proposed Rates

May, June, Sept & Oct Rate	$ -
July & Aug Rate	$ -

	Starting Balance		Revenue	Expense	Monthly Change	Cumulative	
Jul-23	$ 28,464	**A**	$ -	$ 2,700	$ (2,700)	$ 25,764	
Aug-23	$ 25,764		$ -	$ 2,700	$ (2,700)	$ 23,064	
Sep-23	$ 23,064		$ -	$ 2,700	$ (2,700)	$ 20,364	
Oct-23	$ 20,364		$ -	$ 2,700	$ (2,700)	$ 17,664	
Nov-23	$ 17,664		$ -	$ 2,700	$ (2,700)	$ 14,964	
Dec-23	$ 14,964		$ -	$ 2,700	$ (2,700)	$ 12,264	
Jan-24	$ 12,264		$ -	$ 2,700	$ (2,700)	$ 9,564	
Feb-24	$ 9,564		$ -	$ 2,700	$ (2,700)	$ 6,864	
Mar-24	$ 6,864		$ -	$ 2,700	$ (2,700)	$ 4,164	
Apr-24	$ 4,164		$ -	$ 2,700	$ (2,700)	$ 1,464	
May-24	$ 1,464		$ -	$ 2,700	$ (2,700)	$ (1,236)	
Jun-24	$ (1,236)		$ -	$ 2,700	$ (2,700)	$ (3,936)	Undercollection expected to be covered by OER riemb
	Period Cumulative Over/(Under) Collection				$ (32,400)		

	Forecast KWH	Efficiency Rate	Efficiency Revenue	Total Expense
Jul-23	2,197,292	$ -	$ -	$ 2,700
Aug-23	2,295,284	$ -	$ -	$ 2,700
Sep-23	1,493,611	$ -	$ -	$ 2,700
Oct-23	932,116	$ -	$ -	$ 2,700
Nov-23	738,189	$ -	$ -	$ 2,700
Dec-23	789,801	$ -	$ -	$ 2,700
Jan-24	901,187	$ -	$ -	$ 2,700
Feb-24	803,752	$ -	$ -	$ 2,700
Mar-24	776,433	$ -	$ -	$ 2,700
Apr-24	757,451	$ -	$ -	$ 2,700
May-24	962,376	$ -	$ -	$ 2,700
Jun-24	1,360,200	$ -	$ -	$ 2,700
	14,007,691		$ -	$ 32,400

Forecast KWH from 2022 Purchase Power/Transmission rate filing

Efficiency Rates for FY 22/23 Reconciliation
Block Island Power Company

Schedule-2

Efficiency Program Rates

2023 Reconciliation

Beginning	48,649
21 Actual Rev Adj	(20)
21 Actual Exp Adj	(1,991)
	46,638 A

Current Rates

May, June, Sept & Oct Rate	$ -
July & Aug Rate	$ -

	Starting Balance		Revenue	Expense	Monthly Change	Cumulative	
Jul-22	$ 46,638	**A**	$ -	$ -	$ -	$ 46,638	
Aug-22	$ 46,638		$ -	$ 3,600	$ (3,600)	$ 43,038	
Sep-22	$ 43,038		$ -	$ 6,639	$ (6,639)	$ 36,399	
Oct-22	$ 36,399		$ -	$ -	$ -	$ 36,399	
Nov-22	$ 36,399		$ -	$ 160	$ (160)	$ 36,239	
Dec-22	$ 36,239		$ -	$ -	$ -	$ 36,239	
Jan-23	$ 36,239		$ -	$ 1,275	$ (1,275)	$ 34,964	
Feb-23	$ 34,964		$ -	$ 1,300	$ (1,300)	$ 33,664	
Mar-23	$ 33,664		$ -	$ 1,300	$ (1,300)	$ 32,364	
Apr-23	$ 32,364		$ -	$ 1,300	$ (1,300)	$ 31,064	
May-23	$ 31,064		$ -	$ 1,300	$ (1,300)	$ 29,764	
Jun-23	$ 29,764		$ -	$ 1,300	$ (1,300)	$ 28,464	2023 Reconciliation Overcollection
			Period Cumulative Over/(Under) Collection		$ (18,174)		

	Actual KWH	Efficiency Rate	Efficiency Revenue	Total Expense	2023 OER Reimb	Net Expense	
Jul-22	2,239,426	$ -	$ -	$ 300	$ 300	$ -	
Aug-22	2,392,958	$ -	$ -	$ 4,967	$ 1,367	$ 3,600	
Sep-22	1,476,389	$ -	$ -	$ 8,104	$ 1,465	$ 6,639	
Oct-22	954,467	$ -	$ -	$ 5,000	$ 5,000	$ -	
Nov-22	727,948	$ -	$ -	$ 2,592	$ 2,432	$ 160	
Dec-22	789,801	$ -	$ -	$ -	$ -	$ -	
Jan-23	923,494	$ -	$ -	$ 1,575	$ 300	$ 1,275	
Feb-23	768,270	$ -	$ -	$ 2,493	$ 1,193	$ 1,300	Est
Mar-23	775,904	$ -	$ -	$ 1,600	$ 300	$ 1,300	Est
Apr-23	756,036	$ -	$ -	$ 4,315	$ 3,015	$ 1,300	Est
May-23	969,895	$ -	$ -	$ 1,300	$ -	$ 1,300	Est
Jun-23	1,348,806	$ -	$ -	$ 1,300	$ -	$ 1,300	Est
	14,123,394		$ -	$ 33,546	$ 15,372	$ 18,174	

Estimate from Prior filing								
May-22	969,895	$	0.00132	$ 1,280	$ 1,700		$ 1,700	Est
Jun-22	1,348,806	$	-	$ -	$ 1,700		$ 1,700	Est
Actual								
May-22	954,857	$	0.00132	$ 1,260	$ 1,031	$ 1,031	$ -	actual
Jun-22	1,371,593	$	-	$ -	$ 6,392	$ 1,001	$ 5,391	actual
			Variance	$ (20)			$ (1,991)	

Total since last filing $ 17,404

Joint Direct Testimony

of

Noel M. Chambers and Sarah Doherty

Energy New England, LLC

Docket No. _____

April 21, 2023

Noel Chambers

Q. Please state your name and business address for the record.

A. My name is Noel M. Chambers. My principal business address is 5 Hampshire Street, Suite 100, Mansfield, MA 02048.

Q. By whom are you employed and in what capacity?

A. I am the Director of Energy Efficiency and Electrification for Energy New England, LLC (ENE). In this role, I am responsible for the design, development, and implementation of energy efficiency, electrification, demand response and transportation electrification programs for more than two dozen municipal light plants across the Northeast.

Q. Can you please describe your education and experience?

A. I have a Bachelor of Science degree in Mechanical Engineering from the University of Rhode Island and have been working for utilities or organizations which support utility efficiency programs since 2009. I have been certified by the Department of Energy as a Qualified Steam System Specialist, and by the Association of Energy Engineers as: Certified Energy Manager; Certified Demand Side Manager; and Certified Measurement and Verification Professional.

Prior to working for ENE, I was a supervisor of energy efficiency at Eversource Energy where I was responsible for a team which managed strategic initiatives and workforce development activities which were leveraged to help meet the ever-increasing three state (CT, MA, NH) energy efficiency goals. As part of this role, I helped to develop both short-, mid-, and long-term strategies for the energy efficiency team, including helping the Massachusetts Program Administrators write their three-year energy efficiency plans.

Prior to working at Eversource Energy I was a senior engineer at RISE Engineering where I performed commercial and industrial energy audits supporting National Grid's natural gas efficiency program in MA, NH, NY, and RI. As part of this role, I also worked closely with the Rhode Island Housing Authority to audit, propose, and

implement efficiency upgrades for public housing authorities throughout Rhode Island under the American Recovery and Reinvestment Act (ARRA).

Noel's resume is attached hereto as ENE-2.

Q. Have you previously testified before the Rhode Island Public Utilities Commission?

A. No.

Sarah Doherty

Q. Please state your name and business address for the record.

A. My name is Sarah D. Doherty. My principal business address is 5 Hampshire Street, Suite 100, Mansfield, MA 02048.

Q. By whom are you employed and in what capacity?

A. I am the Operations Manager of the Conservation Department at Energy New England, LLC (ENE). In this role, I oversee daily operations for ENE's residential energy audit services for more than two dozen municipal light plants in Massachusetts and Rhode Island; supervise residential rebate processing for ten municipal light plants in Massachusetts; run the residential and commercial solar rebate program for six municipal light plants and the commercial audit and rebate programs for nine municipal light plants.

Q. Can you please describe your education and experience?

A. I have a Master's Degree in Educational Psychology from CUNY-Hunter College in New York City and a Bachelor's Degree in Journalism from New York University. I joined ENE in mid-2018 as a Conservation Coordinator for the Conservation Department to document the department's policies and procedures, conduct a process analyses, and update customer communication and messaging, and launch a dedicated website. I was permanently hired in the fall of 2018 as the Operations Administrator, where I migrated the rebate processing system from paper-based to online and handled all rebate processing, reporting, and program updates.

In 2020, I was promoted to Operations Manager and oversaw operations and processing for the $3.2 million Massachusetts' Department of Energy Resources Solar program; managed ENE's field staff for all residential Conservation Services, expanded the Commercial and Industrial audit and rebate programs, and provided support to Department Director, Noel Chambers.

Sarah's resume is attached hereto as ENE-3.

Q. Have you previously testified before the Rhode Island Public Utilities Commission?

A. No.

Joint Testimony

Q. What is the purpose of your joint testimony?

A. The purpose of our testimony is to sponsor the Block Island Utility District's ("BIUD") Demand Side Management (DSM) 2023 Plan, which is attached hereto as ENE-1.

Q. Please summarize any significant changes from BIUD's Demand Side Management 2022 Plan.

A. While the general framework of the plan is similar to that of previous years, this plan takes a different approach. Compared to previous years, this plan is budgeting ~20% less overall, while increasing the incentives available to Block Island residents to implement solutions in their home. The plan focuses on three key areas: (1) customer outreach, (2) vendor engagement, and (3) enhanced incentives.

Key Area #1 - Customer Outreach: There is a renewed focus on how do BIUD and their auditing partner best get the word out to the island residents. Beyond this, and not funded through the DSM program, is to survey the co-op members to further determine what else the community is looking for from the programs, which will help influence the 2024-2025 plan.

Key Area #2 - Vendor Engagement: There is a real need for both HVAC and Weatherization companies who are willing to travel to the island. ENE in partnership with BIUD is beginning the outreach process to mainland firms to find organizations who would be willing to work in a cohort model where groups of 3-5 customers would be sent to these vendor partners for proposal development, and if the customer accepts, the implementation of the work.

Key Area #3 - Enhanced Incentives: These are necessary to help offset the real costs of installing heat pumps on the island. On the mainland, heat pumps generally cost between $6,000 - $8,000 per ton, depending on the complexity of install. The plan revises BIUDs incentives to better account for the costs, in the ultimate goal of helping the state meet is climate targets.

Q. How is the program being funded?

A. BIUD and the Rhode Island Office of Energy Resources (RI OER) have a multi-year agreement (through 2025) to utilize $180,000 of Regional Greenhouse Gas Initiative (RGGI) funding to help fund the efficiency program offerings. As the BIUD program has not met its participation goals in its two previous plans spanning 2020-21 and 2021-22, it has reduced its energy efficiency member surcharge to $0. BIUD will utilize OER RGGI funding to operate its plan for the 2023 plan year (June 1, 2023 through May 31, 2024). The previously collected surcharge in 2020-21 will be used to pay for any expenses that are not eligible for OER funding.

In the future, as BIUD finds the right balance of program offerings to demand, and as the OER RGGI funding depletes, BIUD will need to reassess having an energy efficiency surcharge to fund the program offerings for its members.

Q. How was the budget developed for the 2023 plan year?

A. The proposed budget is sized with three considerations in mind. First, BIUD needs to propose a budget it is confident it can execute, and one which will mitigate a risk of over- or under-spend. The proposed budget was developed based on our evaluation of prior

plans as well as BIUD's unique needs and limitations. We believe this plan contains more realistic expectations in program uptake, costs, and incentive levels. Second, BIUD recognizes the challenging economic conditions of serving an island, and how developing a budget which allows for increased adoption, but lower overall costs is beneficial to customers. Third, BIUD recognizes there are complementary funding streams (e.g., Block Island Solar Initiative; Inflation Reduction Act) which may provide additional resources for its members to leverage.

Q. What is the 2023 Plan expected to accomplish?

A. The plan is expected to create $0.626 million in total benefits over the life of the installed measures. As proposed, the plan will save 568 MWh over the lifetime of the installed measures. It is projected to save 59 net annual MWh, and 9 net annual kW. The projected annual energy savings from this plan will avoid 516 short tons of carbon.

Q. Does this complete your pre-filed direct testimony?

A. Yes.

Block Island UtilityDistrict
dba Block Island Power Company

DEMAND SIDE MANAGEMENT

2023 PLAN

Block Island Utility District
100 Ocean Avenue
Block Island, New Shoreham, RI 02807
(401) 466-5851

Table of Contents

Section A – Proposed Budget for Demand Side Management Plan

A.1 – 2023 Budget Proposal

Block Island Utility District			
Demand Side Management Programs - 2023 Proposed Budget			
Estimated carry over from 2022	$	28,464.00	
RGGI Funds	$	60,000.00	
Estimated RGGI Fund Carry over 2022	$	44,628.00	
Net 2023 Budget	$	39,932.00	
Budget Category	**Proposed Budget**		**Notes**
Residential Programs			
Home Energy Audits & Direct Install	$	13,300.00	(20) Energy Audits with direct install measures
Weatherization	$	12,500.00	(5) homes insulated and air sealed
HVAC and Water Heating	$	16,100.00	Thermostats; Heat Pump Water Heaters; Mini-Split and Central Heat Pumps; Weatherization Bonus
Sub Total Residential	**$**	**41,900.00**	
Business Programs			
Commercial Assessments	$	11,200.00	(3) Small Business Audits, (1) Professional Energy Audit
DI Lighting & LED Fixtures	$	5,360.00	~30 DI screw in LED, DLC Commercial LED fixtures
Weatherization	$	4,600.00	(1) business insulated and air sealed
HVAC and Water Heating	$	11,100.00	Thermostats; Heat Pump Water Heaters; Mini-Split and Central Heat Pumps; Weatherization Bonus
Sub Total Business	**$**	**32,260.00**	
Administrative			
Program Adiministration	$	4,200.00	Admin Labor, travel expenses, and supples
Inspection Services	$	2,800.00	Inspections for Residential Weatherization; Business Lighting, and Weatherization
Energy Consultant	$	10,000.00	Energy Consultant to provide guideance and recommendations on DSM Program
Sub Total Administrative	**$**	**17,000.00**	
Customer Outreach			
Outreach and Education	$	2,000.00	
Sub Total Customer Outreach	**$**	**2,000.00**	
Estimated DSM 2023 Budget	**$**	**93,160.00**	

A.2 – 2022/2023 Comparison

Block Island Utility District				
Demand Side Management Programs - 2022/2023 Comparison				
	2022	**2023**		
Estimated carry over	$ 46,638.00	$ 28,464.00		
RGGI Funds	$ 60,000.00	$ 60,000.00		
Estimated RGGI Fund Carry over	$ -	$ 44,628.00		
Net Budget	$ (12,902.00)	$ 39,932.00		
Budget Category	2022 Proposed Budget	2023 Proposed Budget	Change in $	% Change
Residential Programs				
Home Energy Audits & Direct Install	$ 31,725.00	$ 13,300.00	$ (18,425.00)	-58%
Weatherization	$ 19,700.00	$ 12,500.00	$ (7,200.00)	-37%
HVAC and Water Heating	$ 5,675.00	$ 16,100.00	$ 10,425.00	184%
Sub Total Residential	**$ 57,100.00**	**$ 41,900.00**	**$ (15,200.00)**	**-27%**
Business Programs				
Commercial Assessments	$ 14,400.00	$ 11,200.00	$ (3,200.00)	-22%
DI Lighting & LED Fixtures	$ 4,000.00	$ 5,360.00	$ 1,360.00	34%
Weatherization	$ 9,200.00	$ 4,600.00	$ (4,600.00)	-50%
HVAC and Water Heating	$ 4,900.00	$ 11,100.00	$ 6,200.00	127%
Sub Total Business	**$ 32,500.00**	**$ 32,260.00**	**$ (240.00)**	**-1%**
Administrative				
Program Adiministration	$ 3,600.00	$ 4,200.00	$ 600.00	17%
Inspection Services	$ 8,100.00	$ 2,800.00	$ (5,300.00)	-65%
Energy Consultant	$ 16,240.00	$ 10,000.00	$ (6,240.00)	-38%
Sub Total Administrative	**$ 27,940.00**	**$ 17,000.00**	**$ (10,940.00)**	**-39%**
Customer Outreach				
Outreach & Education	$ 2,000.00	$ 2,000.00	$ -	0%
Sub Total Customer Outreach	**$ 2,000.00**	**$ 2,000.00**	**$ -**	**0%**
Estimated DSM 2023 Budget	**$ 119,540.00**	**$ 93,160.00**	**$ (26,380.00)**	**-22%**

Section B – Executive Summary

Block Island Utility District's (BIUD) 2023 Demand Side Management Plan reflects an opportunity to rethink the program from its previous two filings. Working in partnership with the Rhode Island Office of Energy Resources (OER) and with their energy consultant and auditing partner, Energy New England, LLC (ENE), BIUD is committed to implementing a series of strategies that will enhance and expand ratepayer access to critical energy-cost savings measures, with the added benefit of helping the State of Rhode Island meet its carbon neutrality goals. A significant part of re-thinking the BIUD DSM Plan is to ensure that we are right sizing the program and its approach to the actual needs of the island residents which will help to drive program adoption.

B.1 – Customer Outreach

A key component of overall program success on Block Island is the personal engagement of BIUD staff with their customers. As their local utility representatives, in a small community, there is a significant trust factor that what is recommended by BIUD will in fact be a benefit. This can be clearly seen through the uptake of audits after the October 18, 2021 outreach day where BIUD and ENE traveled to various customer sites to speak on the program and its benefits. There are two outreach days tentatively planned (one each in Q2 2023 and Q3 2023) to continue the prior success.

Beyond the personal engagement of BIUD staff with their customers to drive program participation, ENE has also been working separately to identify and work with local businesses to educate residents about the programs. When ENE staff is on the island and not actively working, they typically go to either the hardware store or supermarket to speak with residents about the program, and work to get new sign ups. This typically translates into an increase in audits requested, as residents will review the program and then sign up for an energy assessment.

B.2 – Vendor Engagement

BIUD and ENE have been working on developing vendor relationships with mainland contractors who may be willing to work on the island. The primary goal of this relationship development is to translate home energy audits (HEA) into completed projects. The vendors being engaged with typically work with investor-owned utility (IOU) efficiency programs and have familiarity with combining measure types for streamlined implementation. The primary conversations to date have been with a firm with the capability to propose and install both weatherization and heat pump measures at a customer's home.

ENE will review each HEA to then follow up with the customer to determine their appetite to implement the recommendations (i.e., weatherization, heat pumps). ENE would then refer cohorts of 3 to 5 customers to the above referenced vendor, and the vendor would then travel to the island to develop a proposal for each customer. By performing the work in cohorts, vendors may be more willing to travel to the island, because it will be more cost effective for them to do so. Further, BIUD and ENE have discussed covering part or all of the vendor's time to travel to the island to compile the proposals, to ensure the fewest hurdles in getting projects implemented.

B.3 – Enhance Incentives for Heat Pump Technologies

BIUD wants to promote the adoption of high-efficiency electric heat pumps through an incentive structure that considers the real costs to install heat pumps on the island, and what long term savings potential for customers can be. One major consideration that is influencing this change is that mainland customers can expect to pay between $6,000 to $8,000 per ton installed for heat pumps (depending on

system complexity). As mechanical contractors would need to get to the island, the actual install price for BIUD members could be even higher. As such BIUD has been working with ENE to review the incentives for both residential and commercial customers to determine how to most appropriately increase incentives to drive adoption of the technology.

In combination with enhancing incentives, BIUD is still working with Block Island Solar Initiative and its funding philanthropist to understand how the two offerings can be integrated to create the biggest benefits for the island residents. BIUD believes that the programs can be complimentary to each other, helping to eliminate the use of fossil fuels on the island.

B.4 – Program Wide Cost-Effectiveness Testing

BIUD recognizes the importance of program participation including cost and energy savings as well as accounting for all benefits of demand side management.

If the plan as written is successful, it will achieve the following benefits to members of BIUD.

2023 DSM Plan	
Program Expenses	$ 93,160.00
Annual kWh Electric Savings	59,857
Lifetime kWh Electric Savings	568,980
Summer Peak kW Savings	9.0
Participants	76
Lifetime kWh Electric Savings per Participant	7,487
Cost/Lifetime kWh Electric Savings	$ 0.16
Lifetime Carbon Reduction (Short Tons)	516

While this plan is more right sized for the needs of the island residents and will produce significant societal benefits (>500 short tons of carbon savings), it would not be deemed as being cost effective. As written the plan claims $54,767 in benefits, with $93,160 in costs, resulting in a cost benefit of 0.59. However, it should be noted that on a net lifetime savings basis, the cost of this plan is less than the average kWh that either a residential or commercial meter would pay for supply on the island (plan: $0.16/kWh vs average supply: $0.17/kWh for residential and $0.21/kWh for commercial).

Section C – Program Details

C.1 – Residential Programs

The following represent BIUD's proposed 2023 program for residential home energy assessments, direct install measures, weatherization, HVAC and water heating.

Overall, the core program offerings remain unchanged, however incentives for weatherizing and installing heat pumps have been updated to better reflect the increased costs of working on the island. This summary details the programs proposed for 2023 and reviews the 2022 programs.

Home Energy Assessments with Direct Install Measures

Budgeted - $13,300

Residential energy assessments with no-cost direct install measures are critical for households to reduce energy use, lower their energy costs, and identify opportunities for additional, deeper savings. BUID has utilized ENE as its audit partner from its first plan in 2020 and has averaged 10-20 assessments per program year on the island (PY 2020 – 7 audits; PY 2021 – 22 audits).

To date in PY 2022, ENE has performed 12 HEA's on the island, with an additional three rescheduled from December 2022 into late spring 2023. BIUD and ENE are looking to continue to increase the number of audit requests. To date in PY 2022 ENE has installed 148 LEDs and 12 power strips with no uptake on shower heads or faucet aerators. Performing 15 energy assessments per plan year would put BIUD on par with ENE's Massachusetts Municipal Light Plant clients who typically see ~0.75% of their accounts request energy assessments per year.

The 2023 DSM Plan proposes that 20 BIUD customers (~1.05%) receive HEAs per year. Each customer would be eligible for direct install measures inclusive of LED lightbulbs, smart power strips, low-flow shower heads, and faucet aerators. The proposed budget breakdown is as follows:

Budget Item	**Budget**
20 - Home Energy Assessments	$9,500
Direct Install Costs	$3,800

The estimated number of direct install products based on the number of audits follows:

Measure	**Estimated Quantities**	**Notes**
LED Lightbulbs	240	No limit; expect 12 per assessment
Smart Power Strips	40	Maximum of 2 per assessment
Low-Flow Shower Heads	20	Expect 1 per assessment
Aerator Faucets	30	Expect 1.5 per assessment

Weatherization

Budgeted - $12,500

One of the outcomes BIUD expects to achieve with its proposed DSM Plan is to educate customers about the benefits of weatherization and to properly incentivize them to undertake these measures.

Residential customers with weatherization opportunities will learn of these opportunities through the home energy action plan provided at the conclusion of the assessment and given information about potential costs and incentive levels that BIUD offers.

To date in PY 2022, there has been 1 application paid for weatherization. While this is forward progress, the program for PY 2022 had budgeted for ~8 homes to receive up to the cap of $2,000 per home. In light of this BIUD is proposing to scale back the carried budget for weatherization incentives to only include 5 homes for PY 2023.

As mentioned in B.2 – Vendor engagement, BIUD and its partners are looking to leverage the information coming from the home energy assessments to help identify customers for further outreach regarding weatherization. If a customer requests further follow up or a visit to develop a proposal for weatherization work, they will be grouped into a cohort of 3-5 customers that a weatherization vendor will be able to see at one time. In creating cohorts of customers for proposal development and work completion at, we believe we can help drive adoption of the measure, while helping members get a lower overall price.

Budget Item	**Budget**
5 - Weatherization Incentives	$12,000
2 - Heat Pump Adders	$500

The weatherization offering is summarized below:

Measure	**Incentive Level**	**Notes**
Air Sealing	100% of costs, with a cap of $2,000 in total weatherization costs	Based on pilot rebate levels and expected home energy assessment numbers
Duct Sealing		
Insulation		
Pipe Insulation		
Weatherization Bonus	$250	For customers who insulate and install a heat pump system

HVAC and Water Heating

Budgeted - $16,100

As mentioned in Strategy B.3, BIUD has been working to understand how to revise its rebates to better address the costs of installing mechanical systems on the island. The two major changes in BIUD's approach for the 2023 plan are to increase the per ton rebate values for heat pumps, and to increase the maximum rebate per meter. By increasing both the incentive per ton and the cap per home, BIUD will provide more incentive to those products which offer more savings potential. For year-round island residents, BIUD's rate structure should also make heat pumps more cost effective for those who switch from oil.

To date in PY 2022 there have been 2 applications for heat pumps. There have not been any applications for heat pump water heaters or thermostats over the course of the 2022 program year. The 2023 program is budgeting for 8 heat pumps across three categories, 2 heat pump water heaters (under 55 gallons), and 20 programable thermostats being installed.

Budget Item	**Budget**
2 - Central Heat Pump	$5,000
2 - Ducted / Mix Ducted Mini-Split Heat Pumps	$5,000
4 - Ductless Mini-Split Heat Pumps	$5,000
2 - Heat Pump Water Heaters <55 Gallon	$600
20 - Programable Thermostats	$500

The HVAC and water heater offerings are summarized below:

Equipment	**Rating**	**Proposed Rebate**
Central Heat Pump	SEER >15; HSPF >9	$500 per ton
Ducted or Mixed Ducted Mini-Split Heat Pump	SEER >15; HSPF >9	$500 per ton
Ductless Mini- Split Heat Pump	SEER >15; HSPF >10	$250 per ton
Heat Pump Water Heaters	ENERGY STAR < 55 gallon; minimum UEF of 2.00	$300 rebate
	ENERGY STAR >55 gallon; minimum UEF of 2.70	$150 rebate
Programmable Thermostats		$25 rebate
*Rebate not to exceed $3,000 per customer for this program (excluding thermostats).		

Block Island Solar Initiative

While the Block Island Solar Initiative (BISI) is still operating and has a significant complementary benefit to the BIUD program, BIUD is unsure of how much longer it will continue to provide funding. The philanthropist who established BISI passed away in August 2022. As of the last update from BISI, there was a backlog of over 80 heat pumps to be installed. The BISI installer currently does 3-8 installs per year. BIUD believes there may be an opportunity to work with BISI to shorten the timelines of these installs with new vendor partnerships.

As of February 2022, BISI and the philanthropist had helped support 52 heat pump installations via a cash payment of up to $6,000 per installation. With closer collaboration moving forward, BIUD anticipates being able to provide energy audits, inspection services, and rebates to future beneficiaries of this service. The program expects to be able to claim savings from this collaboration through these support services as well as encouraging trade allies that there is a critical mass of heat pump installation projects on the island to make trips cost-effective.

C.2 – Commercial Programs

The following represent BIUD's proposed 2023 program for commercial energy assessments, direct install measures, weatherization, HVAC and water heating.

BIUD would like to maintain the same overall program structure for the commercial programs that were approved in 2022, with some updates to better reflect program uptake in PY 2022. The HVAC program has been updated, like the residential program, however all other programs have been reduced in size.

Commercial Energy Assessments

Budgeted - $11,200

As with the residential offerings, the initial no-cost energy assessment for business and commercial customers is a foundational focus of the proposed business DSM programs. Business assessments can fall into one of two categories: Small Business Audits (facilities less than 10,000 square feet) or Professional Energy Audits (facilities greater than 10,000 square feet and have complex mechanical systems). In both cases the audits are performed by qualified auditors and are fuel blind comprehensive assessments of the commercial metered facilities on the island. In either case the customer will receive a comprehensive energy action plan containing recommendations for energy saving measures.

To date in PY 2022, there has been one commercial assessment performed. This is down from a high of six performed over the course of PY 2021. BIUD estimates four commercial assessments will be conducted in the upcoming program year and that from those assessments' customers will pursue some additional deeper efficiency measures, be that additional lighting, weatherization, or HVAC upgrades. BIUD has set a budget that anticipates that each customer will pursue additional measures of some kind.

Budget Item	**Budget**
3 - Small Business Audits	$6,200
1 - Professional Energy Audit	$5,000

Direct Install Lighting and LED Fixture Programs

Budgeted - $5,360

BIUD would like to continue to offer LED lighting incentives to commercial customers at similar incentive levels to those included in its 2022 Plan. However, there have been slight updates to the overall structure of the proposed rebates. Customers will now be rebated on a per fixture basis instead of a 75% of costs program. This should give both customers and vendors a better understanding of what BIUD's incentive will be and could help spur more program participation. Further any facility in which ENE performs a commercial assessment will be able to have their screw-in bulbs replaced with LEDs.

To date in PY 2022, there have been no applications for LED updates at commercial facilities on Block Island. Since the only completed commercial audit was done by non-ENE staff, that site did not receive any direct install screw-in LED bulbs.

Budget Item	**Budget**
30 – DI Screw-in LED Bulbs	$240

40 – LED Fixtures	$2,000
40 – LED Fixtures with onboard Controls	$3,000
8 – Room Occupancy Sensors	$120

The lighting offerings are summarized below:

Measure	Proposed Rebate	Notes
DI LED Lightbulbs	Free	No limit; expect 10 per assessment
LED Fixtures	$75 / fixture	Must be a DLC listed fixture
LED Fixtures with onboard Controls	$125 / fixture	
Room Occupancy Sensors	$25 / sensor	Expect 2 per assessment

Weatherization

Budgeted - $4,600

In a similar capacity to the residential program BIUD hopes to educate commercial customers about the benefits of weatherization and to properly incentivize them to undertake these measures. Commercial customers with weatherization opportunities will learn of these opportunities through their comprehensive energy plan provided at the conclusion of the assessment and will be given information about potential costs and incentives that BIUD offers.

To date in PY 2022, there have been no applications submitted or paid for commercial weatherization. However, a hotel on the island recently completed a professional energy audit and is interested in utilizing the BIUD weatherization incentives to offset their implementation costs. The PY 2022 had budgeted for 2 commercial customers to receive incentives for weatherizing their properties. The proposed 2023 budget incorporates funding for one commercial customer to weatherize their property.

Budget Item	Budget
1 - Weatherization Incentives	$4,600

The weatherization offering is summarized below:

Measure	Incentive Level	Notes
Air Sealing	100% of costs, with a cap of $4,200 in total weatherization costs	Based on pilot rebate levels and expected commercial energy assessment numbers
Duct Sealing		
Insulation		
Pipe Insulation		

HVAC and Water Heating

Budgeted - $11,100

As mentioned in Strategy B.3, BIUD has been working to understand how to revise its rebates to better address the costs of installing mechanical systems on the island. The two major changes in how BIUD is approaching the 2023 plan are to increase the per ton rebate values for heat pumps, and to increase the maximum rebate per meter. By increasing both the incentive per ton and the cap per business, we are going to be able to provide more incentive to those products which offer more savings potential.

To date in PY 2022, there have been no applications for heat pumps with the program being budgeted for 3 heat pumps. There have not been any applications for heat pump water heaters, or thermostats in the program over the course of the 2022 program year. The 2023 program is budgeting for 4 heat pumps across three categories, 4 heat pump water heaters, and 8 programable thermostats being installed.

Budget Item	**Budget**
1 - Central Heat Pump	$5,000
1 - Ducted / Mix Ducted Mini-Split Heat Pumps	$5,000
2 - Ductless Mini-Split Heat Pumps	$5,000
2 - Heat Pump Water Heaters <55 Gallon	$600
2 - Heat Pump Water Heaters >55 Gallon	$300
8 - Programable Thermostats	$200

The HVAC and water heater offerings are summarized below:

Equipment	**Rating**	**Proposed Rebate**
Central Heat Pump	SEER >15; HSPF >9	$500 per ton
Ducted or Mixed Ducted Mini-Split Heat Pump	SEER >15; HSPF >9	$500 per ton
Ductless Mini- Split Heat Pump	SEER >15; HSPF >10	$250 per ton
Heat Pump Water Heaters	ENERGY STAR < 55 gallon; minimum UEF of 2.00	$300 rebate
	ENERGY STAR >55 gallon; minimum UEF of 2.70	$150 rebate
Programmable Thermostats		$25 rebate
*Rebate not to exceed $4,000 per customer for this program (excluding thermostats).		

C.3 – Customer Outreach

BIUD, outside of the scope of this energy efficiency plan, is working with a partner to survey its members. The overall intent of the survey is to better understand how the members perceive BIUD and to determine what improvements need to be made to help the community. There will also be a section of the survey devoted to energy efficiency, where the members will be able to identify ways in which the program could be updated and improved for future years.

Customer Outreach and Engagement

Budgeted - $2,000

BIUD will continue to strategically engage customers to promote the efficiency programs to Block Island residents and businesses. To ensure customers are aware of the program and its offerings, as well as provide instructions on how to participate, BIUD will promote the DSM programs through the following channels:

- BIUD staff will work with ENE staff to tour the island and engage with the community to develop leads on both residential and commercial audits. One of the three opportunities for this will also be at BIUD's annual meeting, where ENE has a table with various program materials to speak with and educate the community on the programs.
- Bill inserts will be included with customer bills at four different times during the year to advertise the DSM programs, provide information about how customers can participate, and highlight incentive opportunities.
- BIUD will take out quarter page advertisements in the local publications for multiple weeks during both peak and off-peak seasons to reach as many customers as possible. These advertisements will provide information on the programs and have seasonal calls to action to encourage customer participation.
- BIUD will also utilize several no-cost engagement channels, like the community bulletin and BIUD's Facebook page to spread the word about the DSM program to customers.
- BIUD office staff will be trained on the programs, available offerings, and ways customers can engage with energy efficiency to provide accurate information to customers coming into and/or calling the office with questions.

If other outreach opportunities arise, BIUD may pursue other channels of communication with customers if budget allows.

C.4- Administrative

Program Administration

Budgeted - $4,200

The funds from this line item will be used to pay for staff time, supplies, and reimbursement of travel expenses for when ENE staff is supporting BIUD on non-audit days. As noted in Schedule B.2, ENE is going to be on island with BIUD staff to engage with the community to develop audit leads for both residential and commercial customers. This line item also helps ENE to maintain relevant staffing for Customer Service Representatives to answer any inquiries that come in via phone or email regarding the BIUD program.

Inspection Services

Budgeted - $2,800

To ensure the appropriate use of rate payer funds, BIUD proposes that a certain number of implemented projects are inspected for completion each year. Inspections will be carried out on the following application types: residential weatherization, commercial lighting, and commercial weatherization. The inspections will be carried out in person, using a copy of the scope of work to ensure that everything was completed to scope, and that the incentive was paid appropriately. Based on current projections of submitted applications, BIUD is budgeting to inspect 8 buildings in the 2023 program.

Heat pump projects are not included in the inspection protocol because of the requirement to pull both an electrical and mechanical permit to complete the installation of the job.

Energy Efficiency Consultant

Budgeted - $10,000

BIUD recognizes the importance of program participation including cost and energy savings as well as accounting for all benefits of demand side management. Historically BIUD has provided these as a year-end summary, but with their change in energy consultants is looking to provide updates on both a mid-year and year-end report. Their new energy consultant, Energy New England, will be working with BIUD staff to collect data, perform cost-benefit analysis and help with program development moving forward. These reports will include metrics such as annual and lifetime savings, peak savings, participants, cost to achieve and carbon reductions.

Budgeting and Budget Transfers

As BIUD's DSM plan continues to evolve, participation rates will help inform budget setting to ensure funds are allocated as accurately as possible to meet customer demand. Every effort will be made through careful planning, oversight, and budget tracking to ensure that there are no budget overages in a given year. In the event that a budget overage becomes a possibility within a given year, BIUD will close specific program(s) prior to an overage until the following year when funds become available again. If there is an overcollection of ratepayer funds that are not spent on DSM programs in a given year, BIUD will roll those funds over into the next year. The subsequent DSM plan will indicate the amount being rolled over and the way in which those funds are being utilized to support the DSM program.

BIUD is proposing that budget transfers during the program year may occur as follows.

Transfers within a Sector:

For transfers of less than 20% of the originating program's budget, BIUD can transfer funds from one program to another program in the same sector.

For transfers of 20% or more of the originating program's budget, BIUD can transfer funds from one program to another program in the same sector with the Division's prior approval. Upon seeking the Division's approval, BIUD shall simultaneously notify OER.

For all transfers in a sector, BIUD will reflect changes in any applicable report (mid-year or year-end) following the transfer.

For any transfers involving Regional Greenhouse Gas Inventory (RGGI) funds, BIUD may do so within the above limits and with prior written approval from OER.

Transfers between Sectors:

BIUD can transfer funds from one sector to another sector with the Division's prior approval. Upon seeking the Division's approval, the Company shall simultaneously notify OER. If a transfer reduces the originating sector's budget by more than 20% in aggregate over the course of the program year, the transfer will also require PUC approval.

For all transfers between sectors, BIUD will reflect changes in any applicable report (mid-year or year-end) following the transfer.

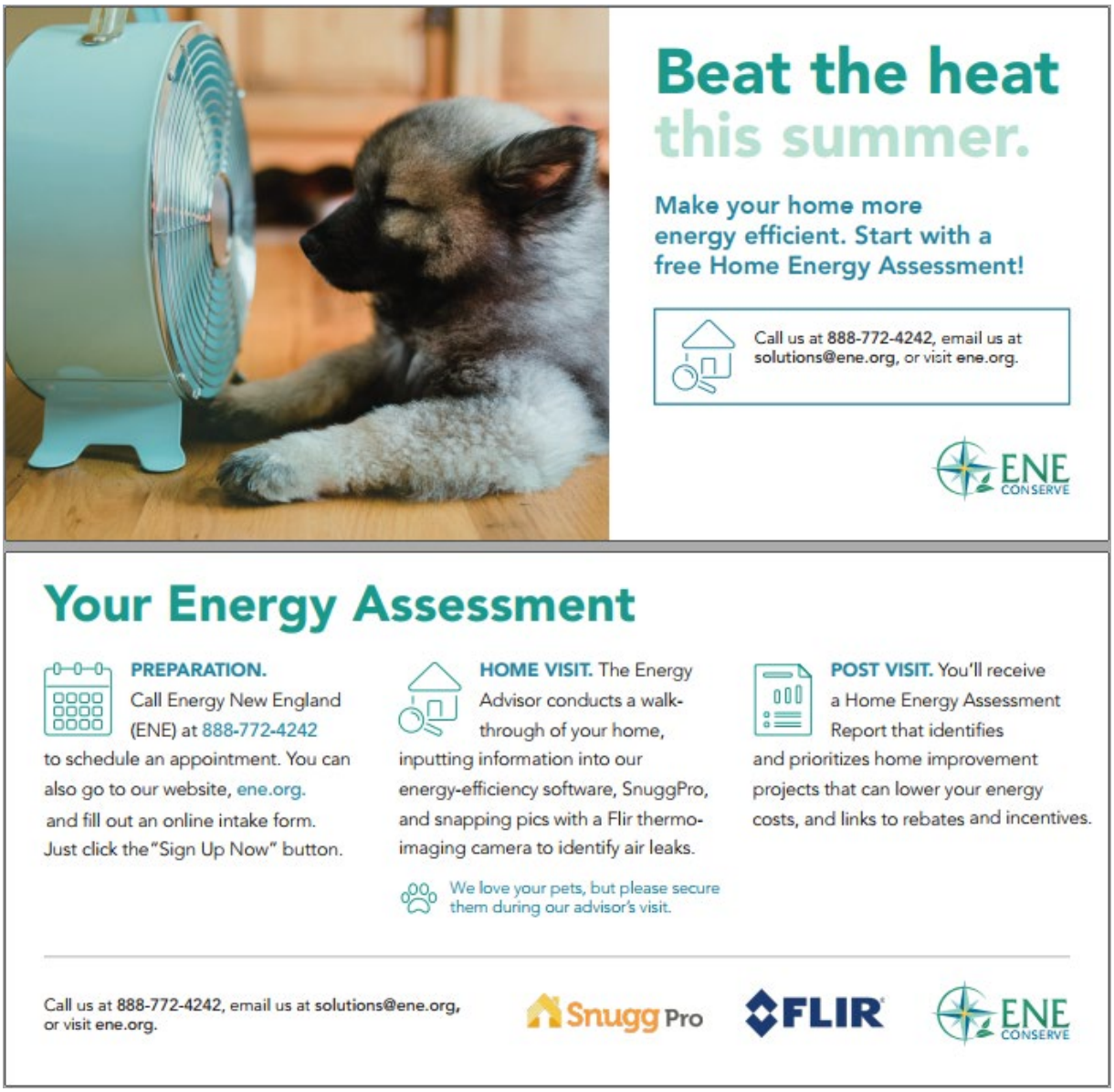
For any transfers involving Regional Greenhouse Gas Inventory (RGGI) funds, BIUD may do so within the above limits and with prior written approval from the Office of Energy Resources (OER).

Section D – Marketing Samples

D.1- Home Energy Assessment Flyers

General Flyer

Summer Bill Stuffer



Fall Marketing

NOEL CHAMBERS

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E-mail: nchambers@ene.org

EDUCATION

University of Massachusetts Boston, Boston, MA: Fellow, Emerging Leader Program, Center for Collaborative Leadership

University of Rhode Island, Kingston, RI: Bachelor of Science: Mechanical Engineering

SUMMARY OF PROFESSIONAL EXPERIENCE

2021 - Present **Energy New England, Mansfield, MA**
Director, Energy Efficiency and Electrification

- Communicates sustainability strategy with clients, engaging leadership in defining the case for change
- Develops and maintains relationship with The Massachusetts Department of Energy Resources (DOER), coordinates DOER reporting, helps to develop and respond to DOER grant opportunities
- Managing the ENE sustainability programs to meet client statutory spending; understanding and translating market changes to new program developments; performing employee reviews; setting, and distributing workloads; engaging with employees to identify career growth opportunities
- Create budgets and implementation plans under which to operate the programs: monitors performance against budgets and acts to meet budget requirements; implements technology and procedures within the Conservation business line to best serve client and customer needs, and optimize work processes; and actively performs business development to expand utility participation in program offerings and increase revenue

2014 - 2021 **Eversource Energy, Westwood, MA**
Supervisor, Energy Efficiency – Core Initiatives Team MA and NH

- Collaborated with State of Massachusetts regulators and stakeholders to define statewide Energy Efficiency Workforce Development strategy, key performance indicators, and methodology to ensure diversity, equity, and inclusion across all communities
- Managed the Core Initiatives team to deliver on portfolio obligations; understanding and translating senior leaderships vision to actionable items; performing employee reviews; setting, and distributing workloads; engaging with employees to identify career growth opportunities
- Reviewed and approved spending for the Core Initiatives budget of $12 million annually and the Workforce Development budgets of $5 million annually
- Lead author in re-writing the Energy Efficiency Implementation Manual including developing sections on conflict of interest, and enhanced incentive approvals
- Engaged with procurement on the management of RFPs and contracted vendors thus ensuring accurate and timely payments of invoices, and compliance with the contractual language

Senior Consultant, Energy Efficiency – Core Initiatives Team

- Collaborated with State of Massachusetts regulators and stakeholders to define statewide Energy Efficiency Workforce Development strategy, key performance indicators, and methodology to ensure diversity, inclusion, and equity across all communities
- Managed the Onsite Operators Training program to influence long term behavioral changes at customer facilities by partnering with operations staff
- Spearheaded the creation of an energy efficiency implementation platform for Chain and Franchise customers, utilizing Dunkin Brands as the flagship trial
- Strategized with team members to bring innovative gas and electric technologies to program offerings to meet ever increasing efficiency goals
- Guided and supported associate members of the team on their initiatives

2009 - 2014 RISE Engineering, Cranston, RI
Senior Engineer – Natural Gas Efficiency

- Performed turnkey energy efficiency services for more than 50 Brown University buildings including savings calculations, bid specification, and post installation verification
- Developed methodologies to efficiently and accurately model insulation and domestic hot water equipment savings through an 8760 hourly analysis
- Formulated best practices that have been adopted by National Grid and have been implemented throughout RISE as a calculation standard
- Performed ARRA funded energy audits meeting ASHRAE Level 3 and HUD standards, working alongside Rhode Island Housing Authority

CERTIFICATIONS

Department of Energy (DOE)

- Qualified Steam System Specialist

Member of The Association of Energy Engineers (AEE)

- Certified Energy Manager (CEM)
- Certified Demand-Side Management Professional (CDSM)
- Certified Measurement and Verification Professional (CMVP)

Northwest Energy Efficiency Council: Building Operator Certification

- Training Certificate of Completion (Level 1)

PUBLICATIONS AND AWARDS

- "Top-Down Engagement: How Utilities Can Better Engage Hard-to-Reach C&I Customers," Association of Energy Engineers (AEE): 2019 AEE East Proceedings, March 2019
- "Certificate of Recognition Exemplary Program to Franchise Business Customer Initiative," American Council for an Energy Efficient Economy (ACEEE), Jan 2019
- "Outstanding Achievement in Non-Residential Program Design and Implementation: Dunkin' Donuts Energy Management Program," Association of Energy Service Processionals (AESP), Feb 2017

US Department of Energy,
Office of Energy Efficiency and Renewable Energy

BestPractices

Certificate of Qualification

awarded to

Industrial Technologies Program

Noel Chambers

of Thielsch Engineering

Is recognized as a

Qualified Steam System Specialist

In the use of the

Steam System Survey Guide,
Steam System Scoping Tool, and the
Steam System Assessment Tool

September 24, 2009
Certificate Number 268

James Quinn
Technology Delivery Team Leader

Qualified Steam Instructors:
Greg Harrell
Riyaz Papar

17 Hours of Instruction Technology
Completed in: Waltham, MA

aee® CEM®

The Association of Energy Engineers

certifies that

Noel M. Chambers

has completed the prescribed standards for certification,
has demonstrated a high level of competence and ethical fitness
for energy management, and is hereby granted the title of

CERTIFIED ENERGY MANAGER®

Valid

January 1, 2022 to December 31, 2024
CEM
19104

AEE Certified Energy Manager SEAL GEORGIA

AEE Board Chairman

AEE Certification Director

Better Buildings U.S. DEPARTMENT OF ENERGY
RECOGNIZED PROGRAM
MEETS U.S. DEPARTMENT OF ENERGY GUIDELINES

ANSI ACCREDITED
An ANSI-Accredited Personnel Certification Program #1088

aee

CDSM™

The Association of Energy Engineers

certifies that

Noel M. Chambers

has completed the prescribed standards for certification, has demonstrated a high level of competence and ethical fitness for demand-side management, and is hereby granted the title of

CERTIFIED DEMAND-SIDE MANAGEMENT PROFESSIONAL

Certification Expiration Date:

December 31, 2025

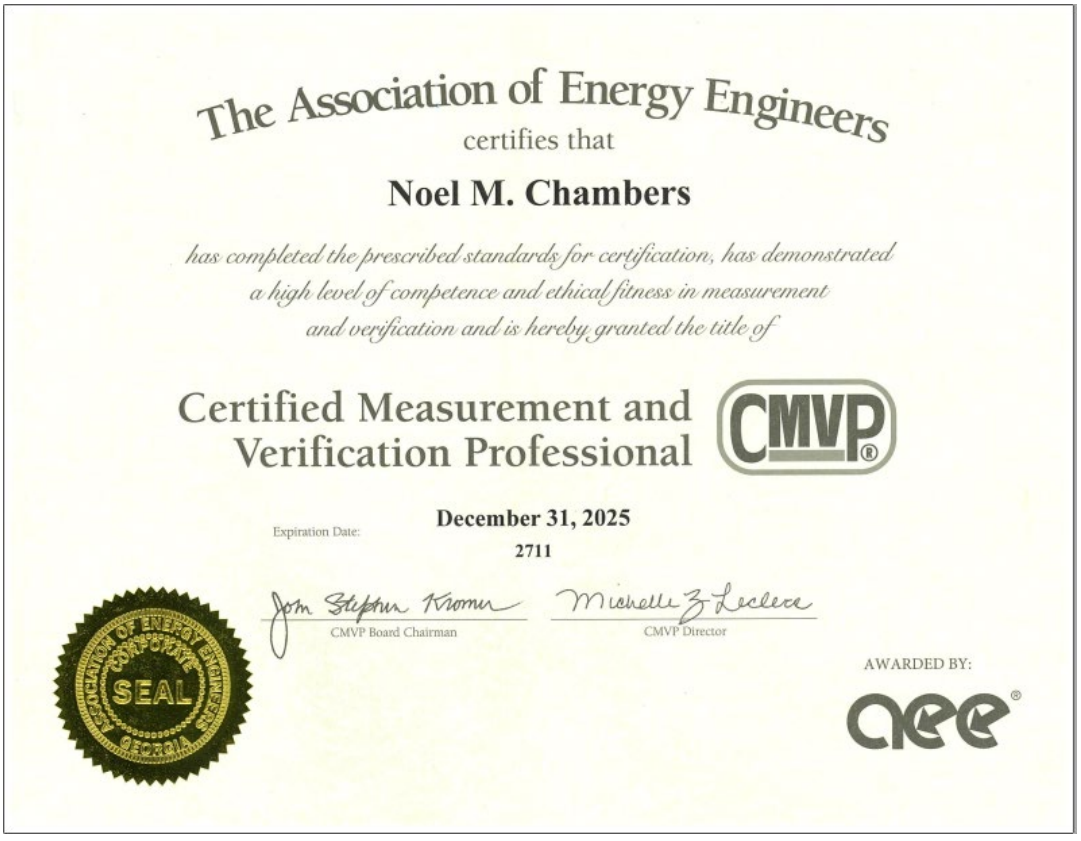
1495

SEAL

CDSM Board Chairman

Francine Desdin

CDSM Certification Director



The Association of Energy Engineers

certifies that

Noel M. Chambers

has completed the prescribed standards for certification, has demonstrated a high level of competence and ethical fitness in measurement and verification and is hereby granted the title of

Certified Measurement and Verification Professional

CMVP®

Expiration Date: **December 31, 2025**

2711

SEAL

CMVP Board Chairman

Michelle Z Leclerc

CMVP Director

AWARDED BY:

aee®

SARAH DOHERTY

5 Hampshire St, Suite 100
Mansfield, MA 02048
Telephone: (508)-698-1224
E-mail: sdoherty@ene.org

SUMMARY OF PROFESSIONAL EXPERIENCE

Energy New England, 5 Hampshire St., Ste. 100, Mansfield, MA 02048
2020 – Present - Operations Manager, Conservation Department

- Monitored $3.2 million solar program, tracking expenditures from 20 participating utilities
- Launched and administered an ongoing solar program with 6 participating utilities
- Supervised ongoing maintenance of two online application portals
- Provided quarterly & monthly reports to MLP customers
- Supervised all residential conservation services & field staff
- Provided support to Department Director for new program research and analysis of past programs and services.

2018-2020 - Operations Administrator, Conservation

- Executed transition to automated rebate processing system by serving as subject matter expert for software company; process mapped all rebate program workflows and eliminated inefficiencies, project-managed delivery timelines, and conducted all QA/QT testing.
- Managed operational set up and administration for the DOER's Residential Municipal Solar Program
- Project-managed set up of the solar program portal
- Hired and trained all new rebate processors
- Verified all rebate application data for accuracy and program eligibility
- Maintained monthly rebate tracking reports for customers
- Managed operational set up for new rebate programs
- Maintained energy efficiency website pages

2018-2018 - Program Coordinator, Conservation

- Reorganized rebate processing workflow & procedures & transitioned rebate application collection to digital formats for ratepayers
- Wrote departmental operational procedures for residential conservation services via staff interview and document review
- Clarified and wrote rebate program requirements for 10 municipal light plants
- Managed multi-family retrofitting project: conducted project outreach to property management and residents, scheduled direct installs, ordered, tracked, and reconciled inventory, and wrote project summary reports for distribution among stakeholders.
- Supported launch of energy efficiency website

2006-2017 - Sam Brocato Salon, 42 Wooster St., NY, NY 10013:
Director of Education, Co-Director of Education, Educator, Apprentice

- Designed & implemented a two-year employee training program
- Supervised staff performance, conducted performance evaluations, provided remedial coaching and career mentoring, and oversaw termination processes.

TECHNICAL SKILLS

Programs*:* MS Office, Zoho CRM, Word Press, QuickBooks, Snugg Pro, Survey Monkey, eTrack+
Written Communication: Business Training Guides, Technical Reports, Marketing

EDUCATION

Master of Arts (M.A) Educational Psychology, Hunter College, City University of New York, 2018
Bachelor of Arts (B.A), Journalism, New York University, 2001