

December 13, 2023

VIA ELECTRONIC MAIL

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

**RE: Docket No. 22-33-EE – 2023 Annual Energy Efficiency Program Plan
Quarterly Report of EERMC Invoices – 2023 – Quarter 4**

Dear Ms. Massaro:

On behalf of The Narragansett Electric Company d/b/a Rhode Island Energy (the “Company”), attached please find the 2023 – quarter 4 report showing Energy Efficiency Resource Management Council (“EERMC”) expenses for work performed by EERMC vendors in connection with the 2023 energy efficiency program year that were paid by the Company between October 1, 2023 to December 31, 2023. For the remaining period of December, the expenses for work performed by EERMC vendors has been estimated.

This report is being filed in accordance with directives issued by the Public Utilities Commission (“PUC”) at an open meeting that occurred on January 25, 2022. Specifically, the PUC directed the Company to file copies of all invoices paid to cover EERMC’s expenses on a quarterly basis by the 15th of April, July, October, and December.

Please note that consistent with the directives issued by the PUC, the Company will also send a copy of this report to each member of the EERMC individually via e-mail.

Thank you for your attention to this filing. If you have any questions or concerns, please do not hesitate to contact me at 401-784-4263.

Sincerely,



Andrew S. Marcaccio

Enclosures

cc: Docket No. 22-33-EE Service List
Margaret Hogan, Esq.
Christy Hetherington, Esq.
John Bell, Division
Joel Munoz, Division

Vendor Name	Vendor Invoice #	Date Range for Time Worked	Invoice \$	Date Invoice Received	Date Approval by EERMC Executive Director Received	Date Invoice Paid
Optimal Energy	337798	May-23	\$ 63,117.00	8/24/2023	8/24/2023	10/4/2023
Optimal Energy	342763	Jun-23	\$ 56,952.25	9/7/2023	9/7/2023	10/13/2023
Marissa Desautel	59	Aug-23	\$ 825.00	10/5/2023	10/5/2023	10/20/2023
Marissa Desautel	89	23-Sep	\$ 1,237.50	10/5/2023	10/5/2023	10/20/2023
Advocacy Solutions	541	Aug-23	\$ 3,187.50	10/20/2023	10/20/2023	10/27/2023
Advocacy Solutions	558	Sep-23	\$ 150.00	10/20/2023	10/20/2023	10/27/2023
Optimal Energy	347157	Jul-23	\$ 59,567.74	11/1/2023	11/1/2023	11/8/2023
Advocacy Solutions	571	Oct-23	\$ 7,537.50	11/9/2023	11/9/2023	11/17/2023
Optimal Energy	350768	23-Aug	\$73,705.00	11/20/2023	11/20/2023	11/23/2023
Marissa Desautel	135	Oct-23	\$11,260.96	11/27/2023	11/27/2023	12/1/2023
Optimal Energy	358226	Sep-23	\$68,575.00	11/27/2023	11/27/2023	11/29/2023

2023 EERMC Projected Expenses

Budget Category	CY 2023 Allocated	Remaining Balance	January	February	March	April	May	June	July	August	September	October	November	December
Consultant Services	\$ 680,331	\$ -	\$ 47,388	\$ 41,861	\$ 48,036	\$ 50,943	\$ 63,117	\$ 56,952	\$ 59,568	\$ 73,705	\$ 68,575	\$ 66,169	\$ 52,009	\$ 52,009
Legal Counsel	\$ 71,162	\$ 13,643	\$ 4,720	\$ 9,268	\$ 5,363	\$ 3,383	\$ 413	\$ 1,497	\$ 2,053	\$ 825	\$ 1,238	\$ 11,261	\$ 8,750	\$ 8,750
Annual Report and Misc. Printing & Distribution	\$ 3,000	\$ 1,486								\$ 1,514				
Council Travel and Education and Advancement	\$ 900	\$ -				\$ 180							\$ 179	\$ 541
Public Education	\$ 57,524													
<i>2023 Farm Energy Fellow</i>	\$ 7,500	\$ -												\$ 7,500
<i>Public Forum & Lecture Series</i>	\$ 25,024	\$ -												\$ 25,024
<i>K-12 Energy Education</i>	\$ 25,000	\$ 25,000												
<i>EE and Climate Awareness Campaign</i>	\$ -	\$ -												
2023 Energy Expo	\$ 40,000	\$ -	\$ 40,000											
EERMC Website	\$ 350	\$ -												\$ 350
Potential Study Data Refresh	\$ 107,884	\$ 6,210			\$ 64,316	\$ 28,542	\$ 2,035			\$ 6,781				
Market-Based Solutions Study	\$ -	\$ -												
Council Branding and Comms Development	\$ 30,000	\$ -				\$ 1,125	\$ 825	\$ 300	\$ 1,950	\$ 3,188	\$ 150	\$ 7,538	\$ 7,463	\$ 7,463
Total	\$ 991,151	\$ 46,340												

VALUES IN RED ARE ESTIMATES AND HAVE NOT YET BEEN INVOICED FOR 2023

INVOICE
Federal Tax ID# 03-0351557



Remit checks to:
Optimal Energy, Inc.
PO Box 74008680
Chicago, IL 60674-8680

Remit ACH transfer to:
ABA Routing Number 063100277
Account Number 898052466590
Email ACH/Wire remittance details to RemittanceNotifications@nv5.com

Remit Wire Transfers to:
ABA Routing Number 026009593
Account Number 898052466590
Swift Code INTL. BOFAUS3N

Steven Chybowski
Rhode Island Office of Energy Resources

May 31, 2023
Project No: 863223-0007525.00
Invoice No: 000000337798

Professional Services from May 1, 2023 to May 31, 2023

Phase 001 EE Prg Planning & Implementation Oversig

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	1.00	140.00	140.00	
Johnson, Craig	1.75	193.00	337.75	
Keller, Michelle	1.00	206.00	206.00	
Ross, Samuel	12.75	206.00	2,626.50	
Totals	16.50		3,310.25	
Total Labor				3,310.25
		Total this Task		\$3,310.25

Task 02 Implementation Oversight and Plan Develo

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	52.00	140.00	7,280.00	
Johnson, Craig	45.25	193.00	8,733.25	
Keller, Michelle	7.00	206.00	1,442.00	
Ross, Samuel	9.75	206.00	2,008.50	
Totals	114.00		19,463.75	
Total Labor				19,463.75

Consultants

Glenn Reed dba: GDR Consulting	927.00			
CORE ENERGY INSIGHTS INC.	1,109.75			
Energy Futures Group, Inc.	2,832.50			
Jennifer Chiodo	1,648.00			
RALPH PRAHL	1,081.50			
Total Consultants			7,598.75	7,598.75
		Total this Task		\$27,062.50

Task 03 Education Initiatives

Professional Personnel

	Hours	Rate	Amount
Caesar, Adrian	4.75	140.00	665.00
Ross, Samuel	3.00	206.00	618.00
Totals	7.75		1,283.00
Total Labor			1,283.00

Consultants

Rachel Sholly			2,857.75
Total Consultants			2,857.75

Total this Task \$4,140.75

Total this Phase \$34,513.50

Phase 002 System Reliability Procurement

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount
Ross, Samuel	1.00	206.00	206.00
Totals	1.00		206.00
Total Labor			206.00

Total this Task \$206.00

Task 02 Plan Development and Oversight

Professional Personnel

	Hours	Rate	Amount
Ross, Samuel	2.50	206.00	515.00
Totals	2.50		515.00
Total Labor			515.00

Total this Task \$515.00

Total this Phase \$721.00

Phase 003 Regulatory Proceedings

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount
Johnson, Craig	4.50	193.00	868.50
Ross, Samuel	6.00	206.00	1,236.00
Totals	10.50		2,104.50
Total Labor			2,104.50

Total this Task \$2,104.50

Task 02 Develop Technical Materials

Professional Personnel

	Hours	Rate	Amount
Johnson, Craig	4.50	193.00	868.50

Project	863223-0007525.00	Rhode Island EERMC - 2023	Invoice	000000337798
Ross, Samuel		2.50	206.00	515.00
Totals		7.00		1,383.50
Total Labor				1,383.50
			Total this Task	\$1,383.50
			Total this Phase	\$3,488.00

Phase 004 Council Sponsored Meetings and Materials
Task 01 Meeting Attendance

Professional Personnel

	Hours	Rate	Amount
Caesar, Adrian	2.00	140.00	280.00
Johnson, Craig	5.00	193.00	965.00
Totals	7.00		1,245.00
Total Labor			1,245.00

Consultants

Rachel Sholly			563.50
Total Consultants			563.50
		Total this Task	\$1,808.50

Task 02 Develop Technical Materials

Professional Personnel

	Hours	Rate	Amount
Caesar, Adrian	3.50	140.00	490.00
Johnson, Craig	11.75	193.00	2,267.75
Ross, Samuel	7.50	206.00	1,545.00
Totals	22.75		4,302.75
Total Labor			4,302.75
		Total this Task	\$4,302.75

Task 03 Other Council Responsibilities

Professional Personnel

	Hours	Rate	Amount
Caesar, Adrian	1.00	140.00	140.00
Johnson, Craig	8.50	193.00	1,640.50
Totals	9.50		1,780.50
Total Labor			1,780.50

Consultants

Rachel Sholly			6,279.00
Total Consultants			6,279.00
		Total this Task	\$8,059.50
		Total this Phase	\$14,170.75

Phase 005 Research, Analysis, and Other Council Su

Professional Personnel

	Hours	Rate	Amount	
Johnson, Craig	10.00	193.00	1,930.00	
Keating, Griffith	1.50	140.00	210.00	
Ross, Samuel	3.25	206.00	669.50	
Socks, Matthew	1.25	206.00	257.50	
Totals	16.00		3,067.00	
Total Labor				3,067.00
Total this Phase				\$3,067.00

Phase 006 Administrative

Professional Personnel

	Hours	Rate	Amount	
Johnson, Craig	2.75	80.00	220.00	
Totals	2.75		220.00	
Total Labor				220.00

Consultants

Rachel Sholly			186.75	
Total Consultants			186.75	186.75
Total this Phase				\$406.75

Phase 007 EERMC Intern

Reimbursable Expenses

Misc Reimbursable Expense				
5/9/2023 URI Energy Fellows Program Fee - Jordan Galuzzo	THE UNIVERSITY OF RHODE ISLAND		3,000.00	
Total Reimbursables			3,000.00	3,000.00

Additional Fees

Monthly Intern Fee (May 2023)			3,750.00	
Total Additional Fees			3,750.00	3,750.00
Total this Phase				\$6,750.00

Billing Limits

	Current	Prior	To-Date	
Total Billings	63,117.00	188,227.00	251,344.00	
Limit			717,025.00	
Remaining			465,681.00	
Total this Invoice				\$63,117.00

Billings To Date

	Current	Prior	Total
Labor	38,881.25	135,321.50	174,202.75
Consultant	17,485.75	52,905.50	70,391.25
Expense	3,000.00	0.00	3,000.00
Add-on	3,750.00	0.00	3,750.00
Totals	63,117.00	188,227.00	251,344.00

Billing Backup

Thursday, June 29, 2023

NV5, Inc.

Invoice 000000337798 Dated 5/31/2023

2:11:55 PM

Phase 001 EE Prg Planning & Implementation Oversig

Task 01 Council Representation

Professional Personnel

		Hours	Rate	Amount
Caesar, Adrian	5/25/2023	1.00	140.00	140.00
May RI Technical Working Group				
Johnson, Craig	5/9/2023	.75	193.00	144.75
Bi-weekly check-in w/ RIE and OER, associated meeting prep.				
Johnson, Craig	5/25/2023	1.00	193.00	193.00
RI EE TWG Meeting attendance				
Keller, Michelle	5/25/2023	1.00	206.00	206.00
Attend RI EE Technical Working Group Mtg				
Ross, Samuel	5/1/2023	4.50	206.00	927.00
prep for, follow ups, attend EERMC LEAD Session				
Ross, Samuel	5/4/2023	1.00	206.00	206.00
OER Check In				
Ross, Samuel	5/9/2023	1.00	206.00	206.00
check in call with OER and RIE				
Ross, Samuel	5/18/2023	4.25	206.00	875.50
Council meeting, prep and follow up re: same				
Ross, Samuel	5/23/2023	1.00	206.00	206.00
RIE/OER check in				
Ross, Samuel	5/25/2023	1.00	206.00	206.00
EE TWG attendance				
Totals		16.50		3,310.25
Total Labor				3,310.25
Total this Task				\$3,310.25

Task 02 Implementation Oversight and Plan Develo

Professional Personnel

		Hours	Rate	Amount
Caesar, Adrian	5/2/2023	3.00	140.00	420.00
Preliminary Q1 data review and report development; May C&I Sector Team agenda development; EM&V Study review and comments - Electric Heat Market Characterization Study, RNC Baseline Study; EM&V study tracker updates				
Caesar, Adrian	5/3/2023	6.00	140.00	840.00
Preliminary Q1 data review and report development; C&I actual-BCR measure remapping; C&I Gas program-level reporting worksheet updates; lifetime savings goal attainment regression analysis; Performance lighting and Networked Lighting Controls report review for RI EE Plan Deep Dive				
Caesar, Adrian	5/4/2023	4.75	140.00	665.00
C&I Sector Team mtg. prep; C&I Sector Team mtg. and follow ups; Data Request to RIE - revised C&I raw data reporting; internal EM&V C-Team check in - C&I EMV meeting planning, Workforce needs assessment draft results review, kitchen equipment ISP comments; NEEA HVAC Market Characterization Report; NonRes New Construction Baseline Study data collection tool review				

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000337798
Caesar, Adrian		5/5/2023	1.25	140.00	175.00	
		NonRes New Construction Baseline Study data collection tool, sample design, and Working Group discussion				
Caesar, Adrian		5/8/2023	.50	140.00	70.00	
		May C&I EM&V agenda development; C&I Deep dive mtg. planning and materials prep - Town/Census-block-level targeting strategies				
Caesar, Adrian		5/9/2023	.50	140.00	70.00	
		Preliminary Q1 Program Results analysis				
Caesar, Adrian		5/10/2023	3.00	140.00	420.00	
		May C&I EM&V Meeting; EM&V study coordination/review - RNC Baseline Study and One-Pager; Preliminary Q1 Program Results analysis; Detailed Q1 025-C/G Data analysis and review				
Caesar, Adrian		5/15/2023	.50	140.00	70.00	
		C&I EE Plan Deep Dive #1 Prep - Draft WF Analysis Report and results review				
Caesar, Adrian		5/16/2023	2.50	140.00	350.00	
		2024-2026 BCR Model Updates Discussion prep; RI Energy Q1 Report Review; final Q1 Data updates; BCR Model updates Discussion w/ RI Energy				
Caesar, Adrian		5/17/2023	1.25	140.00	175.00	
		BCR Model Updates discussion debrief and slides review; C&I EE Plan Deep Dive #1 Prep - RI Energy materials review, discussion questions and topics document development; RI Energy Q1 Report review				
Caesar, Adrian		5/18/2023	2.25	140.00	315.00	
		Income-eligible program barriers and strategies memo development; April Res/IES data review and data report development; Q1 C&I data report and RIE Q1 report review				
Caesar, Adrian		5/19/2023	4.00	140.00	560.00	
		C&I EE Deep Dive Prep - MPS data refresh program and end use level results analysis, HVAC/EMS/MBCx industry best practice research, data sources, and discussion questions development; C&I EE Deep Dive #1: Equity in C&I programs, Workforce Development, Small Business participation and Community Engagement strategy; April C&I raw data review				
Caesar, Adrian		5/22/2023	2.50	140.00	350.00	
		2024-2026 EE Plan C&I Deep dive mtg. prep; 2024-2026 EE Plan C&I Deep dive - HVAC, MBCx/RCx, Building Analytics Program, Energy Management Systems; May Residential EM&V agenda development;				
Caesar, Adrian		5/23/2023	3.75	140.00	525.00	
		EE Plan deep dive meeting debrief, RI carbon pricing methodology, income-eligible program benchmarking and strategy research, EM&V deliverables and call prep; IES/Res program comps and MPS final results analysis; CTeam, OER, RI Energy Check in				
Caesar, Adrian		5/24/2023	6.75	140.00	945.00	
		IES/Res program comps and MPS final results analysis; Res EM&V call prep and study tracker review; Monthly Res EM&V Call and follow ups; C&I EE Plan Deep Dive #3 prep and data analysis - custom and performance lighting results, MPS data refresh highlights, performance lighting tool and incentive level review, SBDI lighting controls and controls strategy; April C&I Data Report development and quarterly tracking workbook updates; RI SEMP initiative design review for May TWG meeting; EM&V study review - Res NC and Code Compliance study final one-pager and report review				
Caesar, Adrian		5/25/2023	2.75	140.00	385.00	
		IES Program review working session; IES/Res program comps and MPS final results analysis				
Caesar, Adrian		5/26/2023	2.25	140.00	315.00	

Project	863223-0007525.00	Rhode Island EERMC - 2023		Invoice	000000337798
		Income Eligible program analysis and research check-in; RI Equity working group strategy discussion; C&I EE Plan Deep Dive #3: Lighting/Performance lighting offerings and updated tool			
Caesar, Adrian	5/30/2023	.25	140.00	35.00	
		C-Team Check in - Income Eligible and Residential program comps			
Caesar, Adrian	5/31/2023	4.25	140.00	595.00	
		C-Team Check in - Income Eligible and Residential program comps, 2024-2026 EE plan narrative review coordination; Income Eligible and Residential program/end use-level comps and potential analysis; EM&V Study review - Draft Workforce Needs Assessment Report			
Johnson, Craig	5/1/2023	2.00	193.00	386.00	
		Review res data report, prep materials for Thursday's sector team call.			
Johnson, Craig	5/3/2023	1.75	193.00	337.75	
		Planning - prep materials and discussion topics for upcoming residential deep dive meetings on streamlining residential home service programs. Prep materials and topics for res NC deep dive meeting.			
Johnson, Craig	5/4/2023	3.25	193.00	627.25	
		Res Sector Team - Review data report and flag questions for sector team meeting. Participate in monthly residential sector team call, associated meeting prep/debrief. C&I Sector Team - Discussion w/ Adrian re: reduced C&I data granularity and identify next steps for resolving.			
Johnson, Craig	5/8/2023	1.75	193.00	337.75	
		Q1 data review in prep for developing Q1 update presentation for Council.			
Johnson, Craig	5/9/2023	5.25	193.00	1,013.25	
		Q1 data review in prep for developing Q1 update presentation for Council. Work on assembling technical agenda for new construction planning deep dive meeting. Discussion w/ Richard re: same. Review recommendations from RNC baseline study. Plan Deep Dive meeting on residential home services streamlining - prep for meeting, conduct meetings, and meeting debrief with Richard and Margie.			
Johnson, Craig	5/11/2023	1.50	193.00	289.50	
		Review draft memo to Equity Working Group regarding Council priorities.			
Johnson, Craig	5/12/2023	2.00	193.00	386.00	
		Review Q1 report from RIE, incorporate results into presentation for Council. Working session with OER on income eligible program improvement considerations.			
Johnson, Craig	5/15/2023	1.00	193.00	193.00	
		Review targets, 3YP and annual planning process with Jordan			
Johnson, Craig	5/16/2023	2.00	193.00	386.00	
		Review BC Models in prep for walkthrough call with Guidehouse, overview with Jordan re: same. Meeting w/ Guidehouse to review new BC Model setup.			
Johnson, Craig	5/18/2023	4.25	193.00	820.25	
		Work on scoping out memo and work assignments for Income Eligible program support memo. Review Council memo on 2024-2026 Priorities to inform discussion points at Council meeting related to Plan updates from the Company. Sector Teams - work on planning activities related to upcoming deep dive and sector team meetings, work on setting up background info for EERMC intern to give overview of activities. Review RIE Q1 report.			
Johnson, Craig	5/19/2023	4.25	193.00	820.25	
		Draft agenda and materials for NC deep dive meeting. Conduct analysis of recent participation and program performance for new construction programs as a material. Work on income eligible participation barriers research, including compiling sources and scoping out research tasks for team.			

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000337798
Johnson, Craig	5/22/2023	3.00	193.00		579.00	
Review upcoming EM&V meetings and related materials, coordinate w/ Adrian about key topics. Monthly check-in meeting with internal res strategy team - discussed deep dive planning meeting content, upcoming June sector team meeting, equity memo and EWG, plan narrative review prep, and res retrofit SOWs.						
Johnson, Craig	5/25/2023	5.50	193.00		1,061.50	
Income Eligible participation barriers and solutions research - check-in with Adrian and Jordan on research tasks, outline next steps. Work on defining income eligible participants, review of participant/non-participant studies, and outlining table of barriers and solutions.						
Johnson, Craig	5/26/2023	2.25	193.00		434.25	
Income Eligible participation barriers and solutions research - working session w/ Sam and Adrian to discuss research completed and next steps. Continue research and analysis on participation rates of income eligible customers. Coordinate internally on coverage for IES Q2 BP meeting.						
Johnson, Craig	5/30/2023	2.25	193.00		434.25	
Working session with Sam and Adrian to discuss income eligible research, prep for first draft 3YP review, and upcoming sector team meetings. Prep for RNC deep dive meeting.						
Johnson, Craig	5/31/2023	3.25	193.00		627.25	
Sector Team Work - Finalize meeting materials for RNC Deep Dive meeting, send update to meeting attendees. 2024-2026 Plan Review - Prep res sector team for plan review in anticipation of delivery of first draft on June 1. Work on review of barriers and solutions table for income eligible non-participants.						
Keller, Michelle	5/3/2023	.50	206.00		103.00	
review RI Q1 data reporting to prep for Thurs C&I Sector team call						
Keller, Michelle	5/4/2023	1.50	206.00		309.00	
C&I Sector Team call; Adrian follow up; review materials for upcoming C&I Deep Dive meetings						
Keller, Michelle	5/16/2023	.50	206.00		103.00	
Review RI data for C&I Sector deep dive mtgs						
Keller, Michelle	5/18/2023	.75	206.00		154.50	
Prep & Review materials for C&I Deep Dive Meetings						
Keller, Michelle	5/19/2023	1.75	206.00		360.50	
C&I Deep Dive Call #1 + prep for Call #2						
Keller, Michelle	5/22/2023	1.50	206.00		309.00	
C&I Sector Deep Dive #2 for C&I EE Planning: topics of HVAC, Commissioning, EMS and Building Analytics systems; prep for upcoming mtg w. Phil Kazlauskas and Dan Mellinger						
Keller, Michelle	5/23/2023	.25	206.00		51.50	
RI SEMP info to Adrian						
Keller, Michelle	5/24/2023	.25	206.00		51.50	
Adrian coordination prep for 5/25 EE Tech Working Group call;						
Ross, Samuel	5/2/2023	.50	206.00		103.00	
work planning and task assignment for LEAD follow ups, Council agenda/materials						
Ross, Samuel	5/5/2023	1.25	206.00		257.50	
task planning for next wk with team; carbon pricing discussion, prep re: same						
Ross, Samuel	5/9/2023	2.25	206.00		463.50	
DEM GHG emissions inventory and EE call with DEM; prep and follow up re: same; confirm roles and responsibilities, timing on track for wokr for wk						
Ross, Samuel	5/12/2023	1.00	206.00		206.00	

Project	863223-0007525.00	Rhode Island EERMC - 2023		Invoice	000000337798
		income eligible call w/OER, prep and follow up re: same			
Ross, Samuel	5/17/2023		.50	206.00	103.00
		Initiate next IE research steps			
Ross, Samuel	5/18/2023		.50	206.00	103.00
		Disc next steps re: income eligible Qs for OER			
Ross, Samuel	5/22/2023		3.00	206.00	618.00
		carbon pricing call, prep re: same; income eligible next steps			
Ross, Samuel	5/26/2023		.75	206.00	154.50
		check in, task mgmt re: IE research, EWG next steps, and other tasks			
		Totals	114.00		19,463.75
		Total Labor			19,463.75
				Total this Task	\$27,062.50

Task	03	Education Initiatives			
Professional Personnel					
			Hours	Rate	Amount
Caesar, Adrian	5/1/2023		4.25	140.00	595.00
		EERMC LEAD Session/Debrief; LEAD session follow-ups and action items documentation			
Caesar, Adrian	5/2/2023		.50	140.00	70.00
		LEAD Session debrief and action items discussion			
Ross, Samuel	5/3/2023		.25	206.00	51.50
		Educ next steps			
Ross, Samuel	5/11/2023		1.50	206.00	309.00
		review, feedback on Advocacy Solutions scope of work, call re: same w/RSholly			
Ross, Samuel	5/12/2023		.75	206.00	154.50
		Advocacy Solutions scope of work follow up mtg			
Ross, Samuel	5/18/2023		.50	206.00	103.00
		Advocacy Solutions first bi-weekly check in			
		Totals	7.75		1,283.00
		Total Labor			1,283.00
				Total this Task	\$4,140.75
				Total this Phase	\$34,513.50

Phase	002	System Reliability Procurement			
Task	01	Council Representation			
Professional Personnel					
			Hours	Rate	Amount
Ross, Samuel	5/17/2023		1.00	206.00	206.00
		attend, present at SRP TWG			
		Totals	1.00		206.00
		Total Labor			206.00
				Total this Task	\$206.00

Task	02	Plan Development and Oversight			
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Professional Personnel

		Hours	Rate	Amount
Ross, Samuel	5/17/2023	1.50	206.00	309.00
develop SRP priorities deck, share same with OER				
Ross, Samuel	5/26/2023	1.00	206.00	206.00
review SRP 2022 Year End Report				
Totals		2.50		515.00
Total Labor				515.00
				Total this Task
				\$515.00
				Total this Phase
				\$721.00

Phase 003 Regulatory Proceedings

Task 01 Council Representation

Professional Personnel

		Hours	Rate	Amount
Johnson, Craig	5/30/2023	4.50	193.00	868.50
Attend Future of Gas Docket Stakeholder Committee meeting.				
Ross, Samuel	5/30/2023	6.00	206.00	1,236.00
Represent Councilor Oakley at future of gas docket				
Totals		10.50		2,104.50
Total Labor				2,104.50
				Total this Task
				\$2,104.50

Task 02 Develop Technical Materials

Professional Personnel

		Hours	Rate	Amount
Johnson, Craig	5/2/2023	1.00	193.00	193.00
Finalize write up of responses to PUC data request to EERMC in LCP Standards docket.				
Johnson, Craig	5/3/2023	1.50	193.00	289.50
Discussion w/ OER on responses to PUC DRs. Work on finalizing DR responses, discussion w/ legal re: same.				
Johnson, Craig	5/4/2023	.25	193.00	48.25
Review upcoming meeting notices for Future of Gas Docket. Review responses to PUC DRs in LCP Standards docket.				
Johnson, Craig	5/25/2023	.50	193.00	96.50
Prep review materials in advance of upcoming stakeholder meeting on future of gas docket				
Johnson, Craig	5/30/2023	1.25	193.00	241.25
Debrief on Future of Gas Docket Stakeholder meeting with Sam. Plan out research assignments on NEPOOL certificates to inform thinking in future of gas docket and in carbon accounting discussions.				
Ross, Samuel	5/3/2023	2.00	206.00	412.00
LCP DR response development, review, team discussion				
Ross, Samuel	5/31/2023	.50	206.00	103.00
future of gas docket debrief w/team				
Totals		7.00		1,383.50
Total Labor				1,383.50

Total this Task \$1,383.50

Total this Phase \$3,488.00

Phase 004 Council Sponsored Meetings and Materials

Task 01 Meeting Attendance

Professional Personnel

			Hours	Rate	Amount
Caesar, Adrian	5/18/2023		2.00	140.00	280.00
	May EERMC Meeting				
Johnson, Craig	5/1/2023		3.00	193.00	579.00
	Attend and present technical material at Council LEAD session. Debrief with client.				
Johnson, Craig	5/18/2023		2.00	193.00	386.00
	Attend and present technical materials for May Council meeting.				
	Totals		7.00		1,245.00
	Total Labor				1,245.00

Total this Task \$1,808.50

Task 02 Develop Technical Materials

Professional Personnel

			Hours	Rate	Amount
Caesar, Adrian	5/3/2023		.25	140.00	35.00
	May EERMC Mtg. materials development check-in; EERMC rebranding and communications initiative planning				
Caesar, Adrian	5/5/2023		.50	140.00	70.00
	May EERMC mtg. materials development				
Caesar, Adrian	5/10/2023		1.50	140.00	210.00
	May EERMC Mtg. Materials Development - Preliminary Q1 Results presentation; C-Team quarterly report				
Caesar, Adrian	5/11/2023		.25	140.00	35.00
	May EERMC Mtg. Materials Development - Preliminary Q1 Results presentation; C-Team quarterly report				
Caesar, Adrian	5/17/2023		.25	140.00	35.00
	May EERMC Mtg. prep				
Caesar, Adrian	5/18/2023		.50	140.00	70.00
	May EERMC Meeting prep				
Caesar, Adrian	5/31/2023		.25	140.00	35.00
	2024 EERMC Budget Development; Branding & Communications and EERMC-commissioned study cost benchmarking				
Johnson, Craig	5/5/2023		.75	193.00	144.75
	Begin prepare material development assignments for May EERMC meeting, discussion w/ Sam and Adrian re: same. Coordinate with RIE team on Q1 presentation.				
Johnson, Craig	5/10/2023		4.00	193.00	772.00
	May Meeting Materials - Working session with Sam and Rachel on development of materials and assignments. Work on developing materials for Q1 Program summary.				

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000337798
Johnson, Craig		5/11/2023	5.00	193.00	965.00	
		Finalize May Meeting Materials - Q1 program update slides, LCP standards update slides, EERMC annual report content. Ongoing discussions w/ team re: same. Package and send materials to OER for posting to Council website.				
Johnson, Craig		5/17/2023	1.00	193.00	193.00	
		Finalize meeting materials, discuss presentation roles, and prep for tomorrow's Council meeting. Update Council meeting calendar.				
Johnson, Craig		5/18/2023	.50	193.00	96.50	
		Finish edits to Council calendar meeting material.				
Johnson, Craig		5/31/2023	.50	193.00	96.50	
		Review draft agenda for June Council meeting, provide feedback.				
Ross, Samuel		5/5/2023	.50	206.00	103.00	
		assess, assign responsibilities for Council materials				
Ross, Samuel		5/10/2023	3.00	206.00	618.00	
		work on Council materials, incl. review OER budget slides, begin work on deck				
Ross, Samuel		5/11/2023	2.75	206.00	566.50	
		finalization of council materials, reviews and edits, re: same, incl. reviews and edits re: annual report SRP sections				
Ross, Samuel		5/17/2023	.50	206.00	103.00	
		prep for Council mtg, coord speaking roles and attendance				
Ross, Samuel		5/31/2023	.75	206.00	154.50	
		assess and coordinate likely Council materials needs, incl. Educ RFP and budget categories to research, 3YP and other items				
		Totals	22.75		4,302.75	
		Total Labor				4,302.75
					Total this Task	\$4,302.75

Task	03	Other Council Responsibilities				
Professional Personnel						
			Hours	Rate	Amount	
Caesar, Adrian		5/5/2023	1.00	140.00	140.00	
		Community Solutions Initiative review & comps to MA Community First Partnerships, Census-block group and neighborhood-level program targeting for Councilor Gill Case				
Johnson, Craig		5/3/2023	.75	193.00	144.75	
		Review EERMC annual report data needs from RIE. Working session with Rachel on updates.				
Johnson, Craig		5/8/2023	2.25	193.00	434.25	
		Annual Report - Review feedback from Sue and Peter. Discussion w/ Rachel and Peter about several graphs and the story they are telling, work on updates to graphs.				
Johnson, Craig		5/10/2023	1.50	193.00	289.50	
		Work on EERMC Annual Report - review near final draft report and have discussion w/ Rachel re: timeline and needs to finalize. Work on graphics for year-end report.				
Johnson, Craig		5/11/2023	.75	193.00	144.75	
		Wrap up graph updates for year-end report.				
Johnson, Craig		5/12/2023	2.75	193.00	530.75	
		Final read through and comment on EERMC annual report, send feedback to Rachel for consideration. Discussion w/ Rachel re: same.				

Project	863223-0007525.00	Rhode Island EERMC - 2023	Invoice	000000337798
Johnson, Craig	5/14/2023	.50	193.00	96.50
Review policy recommendations language in annual report, feedback to Rachel.				
Totals		9.50		1,780.50
Total Labor				1,780.50
			Total this Task	\$8,059.50
			Total this Phase	\$14,170.75

Phase 005 Research, Analysis, and Other Council Su

Professional Personnel

		Hours	Rate	Amount
Johnson, Craig	5/3/2023	1.00	193.00	193.00
Check-in meeting w/ Melissa on development of newsletter for Council for RI. Review RIE RI specific AESC update SOW, discussion w/ Matt and Sam re: same. Quick analysis on share of benefits by category to inform whether SOW is adequate or missing anything.				
Johnson, Craig	5/18/2023	.25	193.00	48.25
Review notes and debrief with Jordan on EC4 STAB meeting.				
Johnson, Craig	5/22/2023	1.00	193.00	193.00
Intern management - Planning tasks and meeting attendance for the week for EERMC Intern. Weekly kickoff meeting.				
Johnson, Craig	5/24/2023	1.00	193.00	193.00
Review update from RIE on Equity Working Group, begin work to compile memo of talking points re: EWG.				
Johnson, Craig	5/26/2023	5.75	193.00	1,109.75
Comprehensive review of historical meeting materials, Council discussion, communications with others, and Council priorities regarding EWG activities and expectations for 2023. Draft summary status update to share with individual Councilors. Review RIE EWG poll, and coordinate with Sam re: attendance, pass along invite to other potential interested stakeholders.				
Johnson, Craig	5/31/2023	1.00	193.00	193.00
EERMC intern oversight - prep review materials for upcoming meetings, draft up research task on NEPOOL certificates, and draft summary assignments for recent stakeholder meetings. Monitor Senate Committee meeting on appointments of new Council members.				
Keating, Griffith	5/5/2023	1.50	140.00	210.00
Prep for carbon call carbon call with state & company follow up internal call				
Ross, Samuel	5/3/2023	.25	206.00	51.50
AESC RI update disc				
Ross, Samuel	5/16/2023	1.50	206.00	309.00
prep for, 2-on-1 with Councilors Case and Anderbois				
Ross, Samuel	5/18/2023	1.00	206.00	206.00
Prep call with acting Chair Gill Case, prep re: same				
Ross, Samuel	5/18/2023	.50	206.00	103.00
EC4 STAB summary from Jordan				
Socks, Matthew	5/3/2023	.75	206.00	154.50
Discuss RIE AESC update scope, comments w/ S.Ross, C.Johnson; review benefits stacks from prior plan				
Socks, Matthew	5/9/2023	.50	206.00	103.00

Participating in RI AESC update kickoff call

Totals	16.00	3,067.00	3,067.00
Total Labor			3,067.00

Total this Phase \$3,067.00

Phase 006 Administrative

Professional Personnel

	Hours	Rate	Amount
Johnson, Craig 5/4/2023 Prepare onboarding materials for Jordan, coordinate start date, hours, schedule, and IT items. Fill out mentor contract. Follow-up with Cindy/others on admin fee payment.	1.50	80.00	120.00
Johnson, Craig 5/17/2023 Update C-Team Q1 activities report.	1.25	80.00	100.00
Totals	2.75		220.00
Total Labor			220.00

Total this Phase \$406.75

Phase 007 EERMC Intern

Total this Phase \$3,000.00

Total this Project \$59,367.00

Total this Report \$59,367.00

INVOICE

To: **Optimal Energy**
ATTN: Cindy Kimball
10600 Route 116 Suite 3
Hinesburg VT 05461
802.482.5624
Cindy.Kimball@nv5.com

URI Invoice No: **28753**
 Date Prepared: **April, 26th 2023**
 Vendor Ref No:
 URI Department: **Cooperative Extension (2012)**
 DeptTelephone: **401-874-2900**

All bills are due and payable upon receipt. Any questions should be directed to the department indicated above.

Date	URI Acct & Chartfield String	Description	Quantity	Unit Price	Amount
02/08/23	101-2012-7021	2023 University of Rhode Island Energy Fellows Program	1	3,000.00	\$ 3,000.00
		coordination fee for Optimal Energy			\$ -
		including:			\$ -
		a) Professional development seminars (May-June 2023; Sept-Dec 2023)			\$ -
		b) Industry training field trips and meetings (May-Aug 2023);			\$ -
		c) Program administration, including student recruitment, screening, placement and evaluation and mentor			\$ -
		organization support (pre-program year; Jan-Dec 2023)			\$ -
		Please direct questions about the Energy Fellows Program fee to Kate Venturini Hardesty, Program Administrator, at 401- 874-4096 or kate@uri.edu.			\$ -
					\$ -
					\$ -
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					\$ -
					\$ -
Please Pay This Amount					\$ 3,000.00

Make checks payable to: University of Rhode Island
 Mail checks to: Carlotti Administration Building
 75 Lower College Road, Suite 011
 Kingston, RI 02881

To insure proper credit, return a copy of this invoice with your payment.

Margie Lynch/Core Energy Insights, Inc.
4445 E. Hoback River Road, Jackson, WY 83001

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 5-2023*
Invoice Date: *May 31, 2023*
OEI Project #: *7525*

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount
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Services Performed 05/01/23 through 05/31/23

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	5.75	\$193.00	\$1,109.75
LABOR - Travel Hours	0.00	\$96.50	\$0.00

Travel Expenses \$0.00
(See attached travel expense form for details.)

TOTAL DUE **\$1,109.75**

Margie Lynch/Core Energy Insights, Inc.
Services Performed 05/01/23 through 05/31/23

		001 - EE Program Planning & Implementation						
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
5/2/2023	Drafted request to Equity Working Group		1.00			0.00	0.00	0.00
5/4/2023	Prepared for and participated in Res Sector Team meeting		1.25			1.00	0.00	1.00
5/5/2023	Compiled information on MA partnerships program in response to Councilor request		0.50			1.25	0.00	1.25
5/9/2023	Reviewed 3 YP outline; participated in and debriefed deep dive meeting w/Company reps re: possible program consolidation		1.75			0.50	0.00	0.50
5/22/2023	Prepared for and participated in prep meeting for Res Deep Dive on new construction		1.25			1.75	0.00	1.75
						1.25	0.00	1.25
						0.00	0.00	0.00
	Total Hours	0.00	5.75	0.00	0.00	5.75	0.00	5.75
	Total Amount	\$0.00	\$1,109.75	\$0.00	\$0.00	\$1,109.75	0.00	\$1,109.75

Energy Futures Group, Inc.
PO Box 587
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 5813
Invoice Date: May 31, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 05/01/2023 through 05/31/2023			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	13.75	\$206.00	\$2,832.50
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$2,832.50</u>

Energy Futures Group, Inc.

Services Performed 05/01/2023 through 05/31/2023

001 - EE Program Planning & Implementation								
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
5/2/2023	Sharepoint enrollment		0.25			0.00	0.00	0.00
5/3/2023	Scheduling, check in with G. Reed		0.50			0.25	0.00	0.25
5/4/2023	C&I sector team meeting		1.00			0.50	0.00	0.50
5/4/2023	Res Sector meeting		1.00			1.00	0.00	1.00
5/9/2023	Prep for then check in with Craig J re. RNC deep dive. Ellen Tohn call re. RI MF opportunities.		1.50			1.00	0.00	1.00
5/16/2023	RI code emails		0.50			1.50	0.00	1.50
5/17/2023	Lighting schedule coordination with Travis @ RIE		0.25			0.50	0.00	0.50
5/22/2023	Attend C&I Deep Dive meeting #2		1.00			0.25	0.00	0.25
5/22/2023	RNC slides, internal planning meeting with Criag, Margie.		1.50			1.00	0.00	1.00
5/23/2023	Scheduling		0.25			1.50	0.00	1.50
5/24/2023	Prepare agenda and questions for C&I lighting deep dive		1.00			0.25	0.00	0.25
5/26/2023	Upstream dashboard updates; prep for lighting deep dive; lead deep dive meeting; send out notes		4.25			1.00	0.00	1.00
5/31/2023	Review RNC questions with G. Reed for RNC deep dive. Review 2024 three year plan preview memo.		0.75			4.25	0.00	4.25
						0.75	0.00	0.75
						0.00	0.00	0.00
	Total Hours	0.00	13.75	0.00	0.00	13.75	0.00	13.75
	Total Amount	\$0.00	\$2,832.50	\$0.00	\$0.00	\$2,832.50	0.00	\$2,832.50

GDR Consulting
576 Rutland St
Carlisle MA 01741

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: **5R**
Invoice Date: **May 31, 2023**
OEI Project #: **7525**

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 05/01/23 through 05/31/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	4.50	\$206.00	\$927.00
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$927.00</u>

GDR Consulting

Services Performed 05/01/23 through 05/31/23

		001 - EE Program Planning & Implementation						
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
						0.00	0.00	0.00
5/4/2023	Participate in monthly RI Sector Team call; review of Q1 data		1.75			1.75	0.00	1.75
5/9/2023	Participate in RI DEEP Dive call: Streamlining Home Energy Services		1.00			1.00	0.00	1.00
5/24/2023	Participate in monthly EM&V call, tracker review and call prep		0.75			0.75	0.00	0.75
5/31/2023	Prep for RNC Deep Dive call: call w/R. Faesy, review of RNC Baseline and Code compliance study and draft comments shared with internal team		1.00			1.00	0.00	1.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
	Total Hours	0.00	4.50	0.00	0.00	4.50	0.00	4.50
	Total Amount	\$0.00	\$927.00	\$0.00	\$0.00	\$927.00	0.00	\$927.00

Make Payable to: Jennifer Chiodo
JLC Consulting
52 Bent Creek Road
Hinesburg, VT 05416

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-23.04*
Invoice Date: *May 31, 2023*
OEI Project #: *7525*

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 05/01/23 through 05/31/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	8.00	\$206.00	\$1,648.00
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$1,648.00</u>

Make Payable to: Jennifer Chiodo

Services Performed 05/01/23 through 05/31/23

001 - EE Program Planning & Implementation								
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
5/4/23	C&I Program meeting, prep and follow-up		1.50			1.50	0.00	1.50
5/16/2023	Deep dive prep - equity, Wx		0.75			0.75	0.00	0.75
5/17/2023	Deep dive prep - equity, Wx		0.50			0.50	0.00	0.50
5/18/2023	Deep dive prep - equity, Wx, Workforce Development		1.00			1.00	0.00	1.00
5/19/2023	Deep dive call - equity, Wx, Workforce Development and HVAC call prep		2.50			2.50	0.00	2.50
5/21/2023	Planning research deep dive prep		1.00			1.00	0.00	1.00
5/22/2023	HVAC deep dive		0.75			0.75	0.00	0.75
						0.00	0.00	0.00
	Total Hours	0.00	8.00	0.00	0.00	8.00	0.00	8.00
	Total Amount	\$0.00	\$1,648.00	\$0.00	\$0.00	\$1,648.00	0.00	\$1,648.00

Ralph Prah
7001 Stanhope Place, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 39
Invoice Date: *May 31, 2023*
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 05/01/23 through 05/31/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	5.25	\$206.00	\$1,081.50
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$1,081.50</u>

Ralph Prah
Services Performed 05/01/23 through 05/31/23

		001 - EE Program Planning & Implementation						
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
5/5/2023	NRNC baseline study (conf call + prep); workforce needs assessment study	1.50				1.50	0.00	0.00
5/10/2023	C&I studies check-in call; RNC baseline repor	0.75				0.75	0.00	1.50
5/26/2023	WFD report	0.25				0.25	0.00	0.75
5/28/2023	WFD report	0.25				0.25	0.00	0.25
5/29/2023	WFD report	1.50				1.50	0.00	0.25
5/30/2023	WFD report	1.00				1.00	0.00	1.50
						0.00	0.00	0.00
	Total Hours	5.25	0.00	0.00	0.00	5.25	0.00	5.25
	Total Amount	\$1,081.50	\$0.00	\$0.00	\$0.00	\$1,081.50	0.00	\$1,081.50

Rachel Sholly
48 Hudson Street, Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 65
Invoice Date: May 31, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount
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Services Performed 05/01/2023 through 05/31/2023

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	60.25	\$161.00	\$9,700.25
LABOR - Admin Hours	2.25	\$83.00	\$186.75
LABOR - Travel Hours	0.00	\$80.50	\$0.00

Travel Expenses \$0.00
(See attached travel expense form for details.)

TOTAL DUE **\$9,887.00**

Rachel Sholly
Services Performed 05/01/2023 through 05/31/2023

Date	Description of Services	001 - EE Program Planning & Implementation			004 - Council Sponsored Meetings & Materials			006-00 Administrative	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Sub-Total Admin Hrs.	Total Hours
		001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	004-01 Meeting Attendance	004-02 Develop Technical Materials	004-03 Other Council Responsibilities					
05/01/23	LEAD mtg prep - printing, slide prep, emails; Sent EdComm mtg materials; LEAD session			0.25	3.50			1.25	3.75	0.00	1.25	5.00
05/03/23	C-team planning re: LEAD debrief, May Council mtg topics; C-team planning re: Annual Report; Compiled outstanding items, emailed to group; EdComm mtg incl. prep; Correspondence w/Advocacy re: work plan			2.00			1.50		3.50	0.00	0.00	3.50
05/05/23	Set up Publisher file for Annual Report						1.00		1.00	0.00	0.00	1.00
05/08/23	payments, annual report; Call w/C. Johnson (C-Team) & P. Gill Case (Councilor) re: Annual Report graphics; Edited Annual Report second draft based on Councilor feedback			0.25			2.00		2.25	0.00	0.00	2.25
05/09/23	Incorporated updated RIE content into second draft Annual Report; Compiling second draft						3.00		3.00	0.00	0.00	3.00
05/10/23	Review & correspondence re: updated Advocacy SOW; C-team check-in re: Council mtg materials; Compiling Annual Report second draft; Public events check-in w/URI; Compiling Annual Report second draft			1.75			6.50		8.25	0.00	0.00	8.25
05/11/23	Compiling Annual Report second draft; Call w/S. Ross (C-Team) & follow-up correspondence re: Advocacy SOW; Compiling Annual Report second draft			0.75			4.25		5.00	0.00	0.00	5.00
05/12/23	Compiling Annual Report second draft; Reviewed & responded to C-Team comments on Annual Report second draft; Call w/C. Johnson (C-Team) re: Annual Report; Call w/Advocacy re: SOW; Correspondence w/RI Energy re: outstanding items for Annual Report			0.25			5.75		6.00	0.00	0.00	6.00
05/14/23	Compiling Annual Report second draft						1.75		1.75	0.00	0.00	1.75
05/15/23	Compiling Annual Report second draft						5.00		5.00	0.00	0.00	5.00
05/16/23	Annual Report copy editing & correspondence; CHP mtg coordination; Council mtg prep; Reviewed & edited Advocacy updated workplan, Review & correspondence re: Advocacy invoice; Calculations & final formatting of Annual Report second draft			1.50			3.50		5.00	0.00	0.00	5.00
05/17/23	Q1 activities report; C-team planning re: Council mtg; Compiled education related dates for updated EERMC calendar; Annual Report communications & second draft updates			0.75			4.00	1.00	4.75	0.00	1.00	5.75
05/18/23	Advocacy check-in; Review & correspondence re: energy expo video; EERMC mtg attendance & annual report presentation			1.50					1.50	0.00	0.00	1.50
05/22/23	CHP mtg coordination						0.25		0.25	0.00	0.00	0.25
05/24/23	Updated RFP calendar; Correspondence re: edu RFPs & mtgs; Developed strategy for review of brand/comms deliverables; Planning for edu mtg; Public events check-in w/URI & follow-up summary to EdComm; Updated brand/comms timeline, related correspondence			5.50					5.50	0.00	0.00	5.50
05/25/23	Sent updated brand/comms timeline to Advocacy			0.50					0.50	0.00	0.00	0.50
05/29/23	Drafted & sent edu agenda to OER			0.50					0.50	0.00	0.00	0.50
05/30/23	CHP mtg coordination - emailed login info to registrants, correspondence w/presenters; Updated Advocacy timeline, related correspondence			0.50			0.25		0.75	0.00	0.00	0.75
05/31/23	EdComm mtg planning - drafted agenda, related correspondence; C-team planning re: public awareness campaign RFP, CHP mtg, public events; Reviewed & redlined draft public awareness campaign RFP; CHP registrant communications			1.75			0.25		2.00	0.00	0.00	2.00
	Total Hours	0.00	0.00	17.75	3.50	0.00	39.00	2.25	60.25	0.00	2.25	62.50
	Total Amount	\$0.00	\$0.00	\$2,857.75	\$563.50	\$0.00	\$6,279.00	\$186.75	\$9,700.25	\$0.00	\$186.75	\$9,887.00

INVOICE
Federal Tax ID# 03-0351557



Remit checks to:
Optimal Energy, Inc.
PO Box 74008680
Chicago, IL 60674-8680

Remit ACH transfer to:
ABA Routing Number 063100277
Account Number 898052466590
Email ACH/Wire remittance details to RemittanceNotifications@nv5.com

Remit Wire Transfers to:
ABA Routing Number 026009593
Account Number 898052466590
Swift Code INTL. BOFAUS3N

Steven Chybowski
Rhode Island Office of Energy Resources

June 30, 2023
Project No: 863223-0007525.00
Invoice No: 000000342763

Professional Services from June 1, 2023 to June 30, 2023

Phase 001 EE Prg Planning & Implementation Oversig

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	2.00	140.00	280.00	
Johnson, Craig	3.00	193.00	579.00	
Ross, Samuel	3.00	206.00	618.00	
Totals	8.00		1,477.00	
Total Labor				1,477.00
		Total this Task		\$1,477.00

Task 02 Implementation Oversight and Plan Develo

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	45.50	140.00	6,370.00	
Johnson, Craig	33.50	193.00	6,465.50	
Keller, Michelle	4.50	206.00	927.00	
Ross, Samuel	23.00	206.00	4,738.00	
Totals	106.50		18,500.50	
Total Labor				18,500.50

Consultants

Glenn Reed dba: GDR Consulting	669.50		
CORE ENERGY INSIGHTS INC.	1,206.25		
EcoMetric Consulting, LLC	5,505.00		
Energy Futures Group, Inc.	2,523.50		
Jennifer Chiodo	566.50		
Rachel Sholly	322.00		
RALPH PRAHL	2,214.50		
Total Consultants		13,007.25	13,007.25
		Total this Task	\$31,507.75

Task 03 Education Initiatives

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	.50	140.00	70.00	
Johnson, Craig	2.50	193.00	482.50	
Ross, Samuel	1.50	206.00	309.00	
Totals	4.50		861.50	
Total Labor				861.50

Consultants

Rachel Sholly			3,260.25	
Total Consultants			3,260.25	3,260.25

Total this Task \$4,121.75

Total this Phase \$37,106.50

Phase 002 System Reliability Procurement

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount	
Ross, Samuel	1.00	206.00	206.00	
Totals	1.00		206.00	
Total Labor				206.00

Total this Task \$206.00

Total this Phase \$206.00

Phase 003 Regulatory Proceedings

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount	
Johnson, Craig	3.50	193.00	675.50	
Ross, Samuel	5.50	206.00	1,133.00	
Totals	9.00		1,808.50	
Total Labor				1,808.50

Total this Task \$1,808.50

Task 02 Develop Technical Materials

Professional Personnel

	Hours	Rate	Amount	
Johnson, Craig	.50	193.00	96.50	
Ross, Samuel	2.00	206.00	412.00	
Totals	2.50		508.50	
Total Labor				508.50

Total this Task \$508.50

Total this Phase \$2,317.00

Phase 004 Council Sponsored Meetings and Materials

Task 01 Meeting Attendance

Professional Personnel

	Hours	Rate	Amount
Caesar, Adrian	2.25	140.00	315.00
Johnson, Craig	2.00	193.00	386.00
Ross, Samuel	2.00	206.00	412.00
Totals	6.25		1,113.00
Total Labor			1,113.00
Total this Task			\$1,113.00

Task 02 Develop Technical Materials

Professional Personnel

	Hours	Rate	Amount
Caesar, Adrian	5.00	140.00	700.00
Johnson, Craig	10.00	193.00	1,930.00
Ross, Samuel	7.25	206.00	1,493.50
Totals	22.25		4,123.50
Total Labor			4,123.50
Total this Task			\$4,123.50

Task 03 Other Council Responsibilities

Professional Personnel

	Hours	Rate	Amount
Belliveau, Eric	1.25	220.00	275.00
Johnson, Craig	1.25	193.00	241.25
Ross, Samuel	4.50	206.00	927.00
Totals	7.00		1,443.25
Total Labor			1,443.25

Consultants

Rachel Sholly			1,569.75
Total Consultants			1,569.75
Total this Task			\$3,013.00
Total this Phase			\$8,249.50

Phase 005 Research, Analysis, and Other Council Su

Professional Personnel

	Hours	Rate	Amount
Caesar, Adrian	3.75	140.00	525.00
Johnson, Craig	13.75	193.00	2,653.75
Ross, Samuel	6.75	206.00	1,390.50
Socks, Matthew	2.25	206.00	463.50
Totals	26.50		5,032.75
Total Labor			5,032.75
Total this Phase			\$5,032.75

Phase 006 Administrative

Consultants

Rachel Sholly			290.50	
	Total Consultants		290.50	290.50
			Total this Phase	\$290.50

Phase 007 EERMC Intern

Additional Fees

Monthly Intern Fee (June 2023)			3,750.00	
	Total Additional Fees		3,750.00	3,750.00
			Total this Phase	\$3,750.00

Billing Limits

	Current	Prior	To-Date	
Total Billings	56,952.25	251,344.00	308,296.25	
Limit			717,025.00	
Remaining			408,728.75	
			Total this Invoice	\$56,952.25

Billings To Date

	Current	Prior	Total
Labor	35,074.50	174,202.75	209,277.25
Consultant	18,127.75	70,391.25	88,519.00
Expense	0.00	3,000.00	3,000.00
Add-on	3,750.00	3,750.00	7,500.00
Totals	56,952.25	251,344.00	308,296.25

Billing Backup

Friday, July 28, 2023

NV5, Inc. Invoice 000000342763 Dated 6/30/2023 7:19:20 AM

Phase 001 EE Prg Planning & Implementation Oversig

Task 01 Council Representation

Professional Personnel

		Hours	Rate	Amount
Caesar, Adrian	6/22/2023	2.00	140.00	280.00
June RI EE Technical Working Group, EV programs, MPS refresh analysis, Customer listening sessions for EE plan/programs, EE plan process updates				
Johnson, Craig	6/5/2023	1.00	193.00	193.00
Monthly check-in call w/ OER. Discussed 3YP coordination, June Council materials, new council member onboarding, and Third Party administration of EE Programs.				
Johnson, Craig	6/6/2023	1.00	193.00	193.00
Bi-Weekly check-in w/ RIE and OER.				
Johnson, Craig	6/15/2023	1.00	193.00	193.00
Check-in meeting with OER - discussed EWG and Income Eligible barriers and solutions research.				
Ross, Samuel	6/13/2023	.50	206.00	103.00
OER/C-Team Check in (partial attendance)				
Ross, Samuel	6/22/2023	1.50	206.00	309.00
prep for, attend majority of EE TWG				
Ross, Samuel	6/23/2023	1.00	206.00	206.00
RIE / OER check in				
Totals		8.00		1,477.00
Total Labor				1,477.00
Total this Task				\$1,477.00

Task 02 Implementation Oversight and Plan Develo

Professional Personnel

		Hours	Rate	Amount
Caesar, Adrian	6/1/2023	5.00	140.00	700.00
C-Team Check in - Income Eligible and Residential program comps, Income Eligible and Residential program/end use-level comps and potential analysis; IES/Residential research and analysis memo development; C&I Sector Team internal 2024-2026 EE plan narrative review coordination; EERMC 2024-2026 EE plan narrative initial C-Team discussion and review				
Caesar, Adrian	6/2/2023	1.75	140.00	245.00
2024-2026 EE Plan Review coordination and updates to C-Team; Income Eligible and Residential program/end use-level comps and potential analysis; IES/Residential research and analysis memo development; RI TWG follow up re: SEMP historical data and participation; 2024-2026 EE Plan review, document comps, and debrief				
Caesar, Adrian	6/5/2023	1.00	140.00	140.00
Income Eligible Market potential analysis and C-Team check-in				
Caesar, Adrian	6/6/2023	.50	140.00	70.00
2024-2026 EE Plan first draft narrative review/comments; 2024-2026 EE Plan Deep Dive notes and follow-ups/open questions review and summary				

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000342763
Caesar, Adrian		6/7/2023	2.50	140.00	350.00	
	2024-2026 EE Plan first draft narrative review/comments; 2024-2026 EE Plan Deep Dive notes and follow-ups/open questions review and summary					
Caesar, Adrian		6/12/2023	1.50	140.00	210.00	
	EM&V Study review/coordination - C&I FRSO study, C&I kitchen equipment ISP study, Workforce Needs Assessment draft report; C&I EM&V mtg. agenda development					
Caesar, Adrian		6/13/2023	1.00	140.00	140.00	
	C-Team working session - Updated 2024-2026 3YP program details document review; Updated 2024-2026 3YP program details document review - comments on C&I program content					
Caesar, Adrian		6/14/2023	2.50	140.00	350.00	
	C&I EM&V Call prep; Updated EM&V study tracker review; June C&I EM&V call and follow ups; EM&V Study review and C-Team comments consolidation - C&I NTG FRSO study survey instruments					
Caesar, Adrian		6/15/2023	.75	140.00	105.00	
	2024-2026 EE Plan narrative/Plan Outline memo review and feedback - C&I and EM&V content					
Caesar, Adrian		6/16/2023	2.00	140.00	280.00	
	EM&V Study review - RICEPY 2021 site report review, Freezer project savings QA/QC, FRSO Sampling Plan; EM&V Study tracker updates					
Caesar, Adrian		6/20/2023	3.75	140.00	525.00	
	EM&V Study review/comments - SBDI process evaluation draft report, RICG2021 and RICE2021 custom site reports; 2024-2026 EE Plan first draft narrative review coordination; C&I performance lighting analysis tool review; C&I Public Listening Workshop					
Caesar, Adrian		6/22/2023	3.25	140.00	455.00	
	May RI Res/IES and C&I Data review and data report development, data QA/QC and questions to RI energy; EM&V study coordination/review - RICE2021 and RICG2021 site report review and EMV study tracker updates					
Caesar, Adrian		6/23/2023	2.00	140.00	280.00	
	C-Team/OER/RI Energy Check-in - regulatory docket updates, EE customer listening sessions recap, upcoming EE Plan development deliverables, statewide and federal program funding coordination, July EERMC prep; EM&V study coordination/review - RICE2021 and RICG2021 site report review					
Caesar, Adrian		6/26/2023	.75	140.00	105.00	
	2024-2026 EE Plan review/C-Team comments; RICE2021 and RICG2021 custom site report review					
Caesar, Adrian		6/27/2023	6.50	140.00	910.00	
	2024-2026 EE Plan narrative and program details review and C-Team comments consolidation; June Residential/IES EM&V agenda development; RICE2021 and RICG2021 custom site report and evaluated RR/recommendations review					
Caesar, Adrian		6/28/2023	3.75	140.00	525.00	
	2024-2026 EE Plan narrative and program details review and C-Team comments consolidation; Res/IES EM&V prep/call and follow ups; IECC 2024 state energy code updates, RNC baseline assumptions discussion and CINC code compliance					
Caesar, Adrian		6/29/2023	5.00	140.00	700.00	
	2024-2026 EE Plan narrative and program details review and C-Team comments consolidation; EE Plan analysis tool development and check-in					
Caesar, Adrian		6/30/2023	2.00	140.00	280.00	

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	C-Team Working Session - 2024-2026 EE Plan narrative and program summary comments, initial quantitative analysis of 3YP data; EE Program implementation RFP review				
Johnson, Craig	6/1/2023	4.50	193.00	868.50	
	Res Sector Team - RNC deep dive planning call, meeting prep and debrief. Income Eligible participation barriers and solutions research - continue work on compiling barriers and solutions identified in participant/non-participant studies, and working on memo to be discussed with OER. Three-Year Plan - initial review of document provided by RIE, working session with internal team and OER to discuss immediate feedback.				
Johnson, Craig	6/2/2023	5.25	193.00	1,013.25	
	Income Eligible participation barriers and solutions research - finish compiling barriers and solutions identified in recent studies. Discussion w/ Sam and Adrian re: same. Check-in meeting w/ OER to debrief on call w/ RIE re: 3YP draft, discussed next steps. Updated BC Model review - review presentation and updates to BC model format and begin preparation of follow-up questions for Guidehouse.				
Johnson, Craig	6/5/2023	2.50	193.00	482.50	
	Income Eligible Barriers and Solutions research - Organize and clean up draft memo, review and discuss with internal team, working session with OER to review the same and discuss next steps.				
Johnson, Craig	6/6/2023	3.75	193.00	723.75	
	3YP Review - Review and begin outlining initial comments, coordinate with Margie, Richard and Glenn on updates on timing for sector program review. Work on reviewing 3YP to assess responsiveness to council priorities.				
Johnson, Craig	6/7/2023	2.75	193.00	530.75	
	Debrief with Sam on individual Councilor meetings regarding first draft 3YP and equity working group activities. Continue work on reviewing 3YP to assess responsiveness to council priorities.				
Johnson, Craig	6/8/2023	4.75	193.00	916.75	
	Complete review of assessment of responsiveness of first draft 3YP to Council priorities and feedback on Plan Outline Memo. Draft key messaging of feedback for incorporation into Council materials.				
Johnson, Craig	6/9/2023	1.25	193.00	241.25	
	Status update on EWG memo - finish edits and discuss next steps with Sam.				
Johnson, Craig	6/13/2023	3.50	193.00	675.50	
	Income Eligible Barriers and Solutions research - continue work on research, draft proposed solution provider(s), brainstorm barriers/solutions to prioritize and focus on. First Draft 3YP Review - Review updated program detail list from RIE, compare with first draft 3YP and outline memo, internal discussion w/ Sam and Adrian re: same, discussion with OER re: same.				
Johnson, Craig	6/15/2023	3.00	193.00	579.00	
	Continue review and comments on first draft of 3YP.				
Johnson, Craig	6/16/2023	.50	193.00	96.50	
	Working session with Sam and Adrian. Discussed debrief items from Council meeting, specifically around next steps for plan review. Discussed EWG and residential sector meeting coverage for upcoming meetings.				
Johnson, Craig	6/20/2023	1.75	193.00	337.75	
	3YP Narrative Review - finalize review and clean up comments.				
Keller, Michelle	6/1/2023	1.00	206.00	206.00	
	RI C&I Sector C Team mtg: prep for draft RIE 3 yr plan review & comments				
Keller, Michelle	6/2/2023	.25	206.00	51.50	
	Prep for 3YP Draft review				

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000342763
Keller, Michelle		6/8/2023	.75	206.00	154.50	
		RI CHP Update				
Keller, Michelle		6/22/2023	.25	206.00	51.50	
		TRM Update scheduling, First pass of May C&I Data Report				
Keller, Michelle		6/27/2023	.50	206.00	103.00	
		RI Draft Narrative - review Part 1				
Keller, Michelle		6/28/2023	1.75	206.00	360.50	
		RI Narrative Plan review & Comments				
Ross, Samuel		6/1/2023	1.75	206.00	360.50	
		coord tasks incl. follow ups for EERMC, prep for plan review, and EWG memo next steps; 3YP initial review, team debrief, communication with OER and emailing concerns to RIE				
Ross, Samuel		6/2/2023	2.50	206.00	515.00	
		corresp w/RIE re: 3YP concerns; team check in, disc. 3YP concerns with RIE and OER, debrief with C-Team and OER, align on next steps				
Ross, Samuel		6/5/2023	2.00	206.00	412.00	
		prep for, attend IE research meeting with OER, covering other topics as well				
Ross, Samuel		6/6/2023	1.00	206.00	206.00	
		partial attendance at RIE/OER check in , proj. catch up w/CJohnson				
Ross, Samuel		6/8/2023	2.00	206.00	412.00	
		finalize proposed 2024 Council budget numbers, comments on 3YP first draft				
Ross, Samuel		6/9/2023	.75	206.00	154.50	
		EWG memo review, plan for sharing				
Ross, Samuel		6/13/2023	1.75	206.00	360.50	
		review, coord. team comments on updated program details from RIE, associated updates to Council materials				
Ross, Samuel		6/15/2023	2.25	206.00	463.50	
		coordinate plan review and meeting coverage for CJohnson outage; meet with S Chybowski re: EERMC role in EWG, IE research next steps, prep re: same				
Ross, Samuel		6/16/2023	.75	206.00	154.50	
		council meeting debrief, next steps, incl. plan review timeline and gas docket coverage				
Ross, Samuel		6/20/2023	.75	206.00	154.50	
		prep for, lead RI carbon pricing next steps convo				
Ross, Samuel		6/23/2023	.25	206.00	51.50	
		check in on next steps with Adrian re: plan comments, etc.				
Ross, Samuel		6/27/2023	1.00	206.00	206.00	
		coord team review and comment consolidation for 3YP and EE Impl RFP				
Ross, Samuel		6/29/2023	1.75	206.00	360.50	
		review, expand on, finalize program details write up C-Team consolidated comments				
Ross, Samuel		6/30/2023	4.50	206.00	927.00	
		review, expand on, finalize, and submit C-Team consolidated comments on 3YP narrative draft				
		Totals	106.50		18,500.50	
		Total Labor				18,500.50
					Total this Task	\$31,507.75

Task 03 Education Initiatives

Professional Personnel

		Hours	Rate	Amount
Caesar, Adrian	6/21/2023	.25	140.00	35.00
EERMC energy fellow education task planning, new Councilor orientation process				
Caesar, Adrian	6/26/2023	.25	140.00	35.00
RI EWG coordination for URI lecture series				
Johnson, Craig	6/1/2023	1.00	193.00	193.00
Review and provide feedback on EE and Climate Awareness Campaign RFP.				
Johnson, Craig	6/6/2023	.50	193.00	96.50
Coordinate w/ Rachel on Public Forum and Lecture Series check-in meeting, review materials in prep for meeting tomorrow. Coordinate with Jordan on participation in meeting.				
Johnson, Craig	6/7/2023	1.00	193.00	193.00
Review and provide feedback on public forum agenda and outline document.				
Ross, Samuel	6/1/2023	.50	206.00	103.00
begin review of Educ RFP				
Ross, Samuel	6/15/2023	.50	206.00	103.00
advocacy solutions bi-weekly check in				
Ross, Samuel	6/28/2023	.50	206.00	103.00
check in w/R Sholly re: educ tasks, Jordan re: newsletter next steps				
Totals		4.50		861.50
Total Labor				861.50
				Total this Task \$4,121.75
				Total this Phase \$37,106.50

Phase 002 System Reliability Procurement

Task 01 Council Representation

Professional Personnel

		Hours	Rate	Amount
Ross, Samuel	6/7/2023	1.00	206.00	206.00
attend SRP elec forecasting mtg				
Totals		1.00		206.00
Total Labor				206.00
				Total this Task \$206.00
				Total this Phase \$206.00

Phase 003 Regulatory Proceedings

Task 01 Council Representation

Professional Personnel

		Hours	Rate	Amount
Johnson, Craig	6/20/2023	3.50	193.00	675.50
Future of Gas Stakeholder Committee meeting				
Ross, Samuel	6/20/2023	5.50	206.00	1,133.00

prep for, attend, debrief on future of gas docket

Totals	9.00	1,808.50	1,808.50
Total Labor			1,808.50

Total this Task \$1,808.50

Task 02 Develop Technical Materials

Professional Personnel

	Hours	Rate	Amount
Johnson, Craig 6/9/2023 Review meeting minutes and plan for upcoming meetings in future of gas stakeholder committee docket.	.50	193.00	96.50
Ross, Samuel 6/26/2023 prep for, attend Future of gas debrief with Councilors AnderBois, Teichert, Gill Case	2.00	206.00	412.00
Totals	2.50		508.50
Total Labor			508.50

Total this Task \$508.50

Total this Phase \$2,317.00

Phase 004 Council Sponsored Meetings and Materials

Task 01 Meeting Attendance

Professional Personnel

	Hours	Rate	Amount
Caesar, Adrian 6/15/2023 June EERMC meeting/mtg. prep	2.25	140.00	315.00
Johnson, Craig 6/15/2023 Attend Council meeting	2.00	193.00	386.00
Ross, Samuel 6/15/2023 attend and present at EERMC	2.00	206.00	412.00
Totals	6.25		1,113.00
Total Labor			1,113.00

Total this Task \$1,113.00

Task 02 Develop Technical Materials

Professional Personnel

	Hours	Rate	Amount
Caesar, Adrian 6/1/2023 Draft June EERMC mtg. agenda review; EERMC 2024 budget planning; EERMC LEAD Session mtg. minutes request	.25	140.00	35.00
Caesar, Adrian 6/5/2023 June EERMC Mtg. materials development - 2024-2026 EE Plan review, EERMC budget development and cost benchmarking for RFPs, LCP standards updates	.75	140.00	105.00

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000342763
Caesar, Adrian		6/6/2023	.50	140.00	70.00	
		June EERMC Mtg. materials development - 2024-2026 EE Plan review, EERMC budget development and cost benchmarking for RFPs, LCP standards updates; May EERMC LEAD Session Minutes updates				
Caesar, Adrian		6/7/2023	2.50	140.00	350.00	
		June EERMC Mtg. materials development - 2024-2026 EE Plan review, EERMC budget development and cost benchmarking for RFPs, LCP standards updates; May EERMC LEAD Session Minutes updates				
Caesar, Adrian		6/13/2023	.50	140.00	70.00	
		June EERMC Mtg. materials development - updated 3YP first draft deck, EERMC draft newsletter				
Caesar, Adrian		6/14/2023	.50	140.00	70.00	
		June EERMC Mtg. prep				
Johnson, Craig		6/1/2023	.75	193.00	144.75	
		Finalize and send feedback on draft agenda for June Council meeting to OER, discussion w/ Sam re: sam.				
Johnson, Craig		6/2/2023	.50	193.00	96.50	
		Check-in w/ team on June council meeting assignments, discuss follow-ups from May Council meeting.				
Johnson, Craig		6/5/2023	1.00	193.00	193.00	
		June Council materials - Walk through Council material assignments with internal team, discuss assignments and content.				
Johnson, Craig		6/6/2023	.75	193.00	144.75	
		June Council Materials - Draft outline for C-Team presentation on First draft of 2024-2026 EE Plan.				
Johnson, Craig		6/7/2023	1.25	193.00	241.25	
		June Council Materials - Continue work on First Draft 3YP presentation. Brainstorm content for update on third party procurement/Council budget consideration, check-in call with Steve re: same.				
Johnson, Craig		6/8/2023	4.75	193.00	916.75	
		June meeting materials - draft materials for LCP standards and 3YP Review agenda items, review and address feedback from Sam, finalize materials. Review and finalize LEAD session meeting minutes enhancements. Review and provide feedback on Budget proposal presentation. Review and finalize EE and Climate Public Awareness RFP presentation. Ongoing discussions w/ team re: same.				
Johnson, Craig		6/9/2023	.75	193.00	144.75	
		Assist in developing content and background for Council budget planning discussion. Finalize revised budget discussion deck and deliver to OER.				
Johnson, Craig		6/13/2023	.25	193.00	48.25	
		Coordinate with OER on Council materials.				
Ross, Samuel		6/5/2023	.50	206.00	103.00	
		check in on development of Council materials				
Ross, Samuel		6/6/2023	1.00	206.00	206.00	
		Cont. dev of Council materials, coord with team, incl. review of OER budget materials				
Ross, Samuel		6/7/2023	2.00	206.00	412.00	
		cont. dev of council materials, incl. check in w/R Sholly on educ materials, revisions to draft agenda, outline budget deck				
Ross, Samuel		6/8/2023	2.00	206.00	412.00	
		finalize Council materials: review, edits, to LCP, 3YP decks; finish dev of, implement changes based on others' feedback on, budget deck.				
Ross, Samuel		6/9/2023	.50	206.00	103.00	
		final pass, submission, plan for next steps re: council materials				
Ross, Samuel		6/14/2023	.50	206.00	103.00	
		review Council materials, confirm speaking roles & attendance				

Project	863223-0007525.00	Rhode Island EERMC - 2023	Invoice	000000342763
Ross, Samuel	6/15/2023	.75	206.00	154.50
prep for council presentations on 3YP draft update, budget, LCP and Educ RFP				
Totals		22.25		4,123.50
Total Labor				4,123.50
Total this Task				\$4,123.50

Task	03	Other Council Responsibilities		
Professional Personnel				
		Hours	Rate	Amount
Belliveau, Eric	6/23/2023	1.25	220.00	275.00
review administrator RFP for OER				
Johnson, Craig	6/2/2023	.75	193.00	144.75
Update Annual Report graphics with final numbers from RIE				
Johnson, Craig	6/14/2023	.50	193.00	96.50
Update electric and gas bill savings calculations based on year-end report numbers, share with Rachel for inclusion in Councils Annual Report.				
Ross, Samuel	6/7/2023	.50	206.00	103.00
EE Implementation RFP mtg, prep re: same				
Ross, Samuel	6/21/2023	2.00	206.00	412.00
review past project materials, prep guiding Qs and considerations for EE Impl RFP process				
Ross, Samuel	6/23/2023	2.00	206.00	412.00
prep for, attend meeting with Steve re: EE Admin RFP Disc; follow up review of mtg materials				
Totals		7.00		1,443.25
Total Labor				1,443.25
Total this Task				\$3,013.00
Total this Phase				\$8,249.50

Phase	005	Research, Analysis, and Other Council Su		
Professional Personnel				
		Hours	Rate	Amount
Caesar, Adrian	6/27/2023	.25	140.00	35.00
EERMC Newsletter development				
Caesar, Adrian	6/28/2023	.25	140.00	35.00
EERMC onboarding materials development; Public education campaign RFP updates				
Caesar, Adrian	6/30/2023	3.25	140.00	455.00
EERMC Newsletter Development and revisions				
Johnson, Craig	6/1/2023	.75	193.00	144.75
Review and respond to Sam's feedback on EWG status update memo.				
Johnson, Craig	6/5/2023	2.00	193.00	386.00
EERMC Energy Fellow Oversight - Review summaries of Future of Gas Docket stakeholder meeting, EC4 meetings, and research on NEPOOL GIS REC certificates research.				
Johnson, Craig	6/6/2023	.50	193.00	96.50
EERMC Newsletter - Discussion w/ Jordan and Melissa about tools and applications that can be used for newsletter, overview of related tasks.				

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000342763
Johnson, Craig		6/7/2023	1.50	193.00	289.50	
		Review Jordan's summary notes from recent EC4 and Future of Gas stakeholder meetings, provide next steps on converting content in notes to short summaries for Council newsletter. Review Jordan research on RECs and how they operate in RI.				
Johnson, Craig		6/8/2023	.50	193.00	96.50	
		Check-in w/ Jordan on newsletter development and recent meeting summaries.				
Johnson, Craig		6/9/2023	4.50	193.00	868.50	
		Check-in w/ Sam on variety of Council support items, including research for Councilor Gill Case, data request from OER related to HE HP plan, IE research, and fossil fuel incentive phase out plan. Research and data analysis on HP, HPWH, and Pre-Wx barrier data in RI for OER.				
Johnson, Craig		6/12/2023	.50	193.00	96.50	
		Intern management - prep workstreams, including check-in on EERMC Newsletter, upcoming meeting attendance, and Legislative tracking.				
Johnson, Craig		6/13/2023	.25	193.00	48.25	
		Review and provide feedback on EERMC newsletter draft, discussion with Jordan re: same.				
Johnson, Craig		6/14/2023	2.00	193.00	386.00	
		Work on data request from OER related to HE HP plan - assemble historical gas program data. Coordination call with regional consultants on key topics in EE regionally.				
Johnson, Craig		6/16/2023	1.00	193.00	193.00	
		Kickoff meeting with OER, RIE, and rewiring america to discuss process and next steps for creating RI specific tool.				
Johnson, Craig		6/20/2023	.25	193.00	48.25	
		Check-in w/ Jordan on EERMC newsletter work.				
Ross, Samuel		6/1/2023	.50	206.00	103.00	
		coord 2-on-1 mtg with Councilors Case and AnderBois				
Ross, Samuel		6/6/2023	2.00	206.00	412.00	
		2-on-1 (long) with Peter and Sue, prep and follow up re: same				
Ross, Samuel		6/13/2023	.75	206.00	154.50	
		pre-EERMC quick check in w/Councilor Case, incl. disc of EERMC newsletter template developed by MG Energy Fellow Jordan				
Ross, Samuel		6/15/2023	1.75	206.00	360.50	
		meet with Councilor Case prior to EERMC mtg, prep re: same				
Ross, Samuel		6/21/2023	.50	206.00	103.00	
		checking in with Rachel and Jordan on educ, council newsletter.				
Ross, Samuel		6/22/2023	1.25	206.00	257.50	
		EE landscape orientation for Emily Koo				
Socks, Matthew		6/1/2023	.50	206.00	103.00	
		Reviewing RI AESC update materials				
Socks, Matthew		6/5/2023	1.00	206.00	206.00	
		Discussing RI AESC update w/ RIE and Synapse staff				
Socks, Matthew		6/13/2023	.75	206.00	154.50	
		Reviewing/commenting on final draft AESC 2021 update memo for RIE				
		Totals	26.50		5,032.75	
		Total Labor				5,032.75
					Total this Phase	\$5,032.75
Phase	006	Administrative			Total this Phase	\$290.50

Project	863223-0007525.00	Rhode Island EERC - 2023	Invoice	000000342763
			Total this Project	\$53,202.25
			Total this Report	\$53,202.25

GDR Consulting
576 Rutland St
Carlisle MA 01741

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: **6R**
Invoice Date: **June 30, 2023**
OEI Project #: **7525**

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 06/01/23 through 06/30/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	3.25	\$206.00	\$669.50
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$669.50</u>

GDR Consulting

Services Performed 06/01/23 through 06/30/23

		001 - EE Program Planning & Implementation								
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	006-00 Administrative	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours	
							0.00	0.00	0.00	
6/21/2023	Complete review and comments on 2024 Plan draft and residential enhancements		1.25				1.25	0.00	1.25	
6/26/2023	Initial review of May program data. Questions to Optimal re: depth of review and timing		0.25				0.25	0.00	0.25	
6/28/2023	Attend monthly RI EM&V meeting, meeting prep		0.75				0.75	0.00	0.75	
6/28/2023	Internal follow up from monthly EM&V call: development of new UDRHs and handling of fuel choice savings. Review of RNC program documents		1.00				1.00	0.00	1.00	
							0.00	0.00	0.00	
							0.00	0.00	0.00	
	Total Hours	0.00	3.25	0.00	0.00	0.00	3.25	0.00	3.25	
	Total Amount	\$0.00	\$669.50	\$0.00	\$0.00	\$0.00	\$669.50	0.00	\$669.50	

Margie Lynch/Core Energy Insights, Inc.
4445 E. Hoback River Road, Jackson, WY 83001

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 6-2023*
Invoice Date: *June 30, 2023*
OEI Project #: *7525*

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount
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Services Performed 06/01/23 through 06/30/23

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	6.25	\$193.00	\$1,206.25
LABOR - Travel Hours	0.00	\$96.50	\$0.00

Travel Expenses \$0.00
(See attached travel expense form for details.)

TOTAL DUE **\$1,206.25**

Margie Lynch/Core Energy Insights, Inc.
Services Performed 06/01/23 through 06/30/23

		001 - EE Program Planning & Implementation						
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
6/21/23	Participated in Equity Working Group meeting; reviewed and commented on 2024-2026 Plan updates and narrative		2.00			0.00	0.00	0.00
6/22/23	Participated in LI listening session		1.50			2.00	0.00	2.00
6/27/2023	Participated in Res listening session		1.50			1.50	0.00	1.50
6/28/2023	Participated in LI Best Practices meeting; briefed team re: same		1.25			1.50	0.00	1.50
						1.25	0.00	1.25
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
	Total Hours	0.00	6.25	0.00	0.00	6.25	0.00	6.25
	Total Amount	\$0.00	\$1,206.25	\$0.00	\$0.00	\$1,206.25	0.00	\$1,206.25



EcoMetric Consulting, LLC
555 Exton Cms
Exton, PA 19341
610.400.8600
admin@ecometricconsulting.com

INVOICE

BILLED TO

Sam Ross
Optimal Energy - NV5
10600 Route 116, Suite 3
Hinesburg, VT 05461

TOTAL DUE

\$5,505.00

Project Name RI EERMC Consultant
Project # 7525
Invoice # 1029-P6-23
Billing Period 04/29/2023 - 06/30/2023

Invoice Date 06/30/2023
Due Date 07/30/2023
Payment Terms Net 30

Task Number	Description	Amount
001-02	Implementation Oversight & Plan Development	\$5,505.00

Subtotal \$5,505.00

Invoice Total \$5,505.00

Invoice Number 1029-P6-23
 Period 04/29/2023 - 06/30/2023

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EERMC Consultant	Implementation Oversight & Plan D	Salil Gogte	Partner	2023-06	0	\$ 220.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Michael Frischmann	Partner	2023-06	0	\$ 220.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Michael Honeychuck	Managing Consultant	2023-06	13.5	\$ 206.00	\$ 2,781.00
RI EERMC Consultant	Implementation Oversight & Plan D	Bitul Sinha	Managing Consultant	2023-06	10	\$ 206.00	\$ 2,060.00
RI EERMC Consultant	Implementation Oversight & Plan D	Cory Read	Data Scientist	2023-06	0	\$ 206.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Jake Fuller	Managing Consultant	2023-06	0	\$ 206.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Mary George	Sr Engineer	2023-06	4	\$ 166.00	\$ 664.00
Total					27.50		\$ 5,505.00

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EERMC Consultant		0 Salil Gogte	Partner	2023-06	0	\$ 220.00	\$ -
RI EERMC Consultant		0 Michael Frischmann	Partner	2023-06	0	\$ 220.00	\$ -
RI EERMC Consultant		0 Michael Honeychuck	Managing Consultant	2023-06	0	\$ 206.00	\$ -
RI EERMC Consultant		0 Bitul Sinha	Managing Consultant	2023-06	0	\$ 206.00	\$ -
RI EERMC Consultant		0		2023-06	0		\$ -
Total					-		\$ -

fname	local_date	hours	task	notes
Michael Hoi	5/3/2023	0.5	Implementation Oversight	Invoice & discussions
Michael Hoi	5/4/2023	0.5	Implementation Oversight	Monthly check-in with Adrian
Michael Hoi	5/10/2023	0.5	Implementation Oversight	Monthly C&I call with RI Energy & C-Team
				Setup tracker for Custom Electric & Gas reports
Bitul Sinha	6/26/2023	2	Implementation Oversight	Custom Gas reports Review
Bitul Sinha	6/28/2023	2	Implementation Oversight	Custom Gas reports Review
Bitul Sinha	6/29/2023	2	Implementation Oversight	Custom Gas reports Review
Bitul Sinha	6/30/2023	4	Implementation Oversight	Custom Gas/Electric reports Review

Energy Futures Group, Inc.
PO Box 587
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 5852
Invoice Date: June 30, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 06/01/2023 through 06/30/2023			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	12.25	\$206.00	\$2,523.50
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$2,523.50</u>

Energy Futures Group, Inc.

Services Performed 06/01/2023 through 06/30/2023

001 - EE Program Planning & Implementation								
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
6/1/2023	C&I C-team check-in		0.50			0.00	0.00	0.00
6/1/2023	Prep then RNC deep dive meeting		1.50			0.50	0.00	0.50
6/8/2023	2024 Plan review prep		0.25			1.50	0.00	1.50
6/13/2023	2024-26 Plan review		0.25			0.25	0.00	0.25
6/14/2023	Plan emails		0.25			0.25	0.00	0.25
6/16/2023	Provide feedback on performance lighting analysis		1.00			0.25	0.00	0.25
6/19/2023	2024-26 Plan review		2.00			1.00	0.00	1.00
6/20/2023	RI 2024-26 Plan review out.		1.50			2.00	0.00	2.00
6/27/2023	Review RIE 2024-26 Plan Narrative		3.00			1.50	0.00	1.50
6/27/2023	RIE public listening session, follow up notes		2.00			3.00	0.00	3.00
						2.00	0.00	2.00
						0.00	0.00	0.00
	Total Hours	0.00	12.25	0.00	0.00	12.25	0.00	12.25
	Total Amount	\$0.00	\$2,523.50	\$0.00	\$0.00	\$2,523.50	0.00	\$2,523.50

Make Payable to: Jennifer Chiodo
JLC Consulting
52 Bent Creek Road
Hinesburg, VT 05416

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-23.05*
Invoice Date: *June 30, 2023*
OEI Project #: *7525*

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 06/01/23 through 06/30/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	2.75	\$206.00	\$566.50
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$566.50</u>

Make Payable to: Jennifer Chiodo
Services Performed 06/01/23 through 06/30/23

001 - EE Program Planning & Implementation

Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	006-00 Administrative	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
6/23/23	Review draft 3 year plan and comment		1.50				1.50	0.00	1.50
6/23/23	May 2023 data report rvw and comment		0.75				0.75	0.00	0.75
6/28/2023	3 year plan review		0.50				0.50	0.00	0.50
							0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total Hours	0.00	2.75	0.00	0.00	0.00	2.75	0.00	2.75
	Total Amount	\$0.00	\$566.50	\$0.00	\$0.00	\$0.00	\$566.50	0.00	\$566.50

Rachel Sholly
48 Hudson Street, Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 66
Invoice Date: June 30, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount
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Services Performed 06/01/2023 through 06/30/2023

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	32.00	\$161.00	\$5,152.00
LABOR - Admin Hours	3.50	\$83.00	\$290.50
LABOR - Travel Hours	0.00	\$80.50	\$0.00

Travel Expenses \$0.00
(See attached travel expense form for details.)

TOTAL DUE **\$5,442.50**

Rachel Sholly

Services Performed 06/01/2023 through 06/30/2023

Date	Description of Services	001 - EE Program Planning & Implementation			004 - Council Sponsored Meetings & Materials							
		001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	004-01 Meeting Attendance	004-02 Develop Technical Materials	004-03 Other Council Responsibilities	006-00 Administrative	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Sub-Total Admin Hrs.	Total Hours
06/05/23	EdComm mtg prep - agenda, materials, public events; Public awareness RFP - reviewed C-team comments, sent to OER, related correspondence; Finalized & sent EdComm agenda & materials			1.50					1.50	0.00	0.00	1.50
06/07/23	EdComm mtg prep; C-team planning re: EdComm mtg, Council mtg materials; Public forum planning w/C-team; Correspondence re: corrected Advocacy invoice; EdComm mtg; Public events check-in w/URI; CHP mtg prep - slides, registrations & correspondence; Update awareness campaign RFP per EdComm discussion			5.50			0.50		6.00	0.00	0.00	6.00
06/08/23	C-team strategy call re: public awareness campaign RFP, related correspondence; CHP mtg prep; CHP mtg & follow-up; Drafted public awareness RFP slides for Council mtg, referenced prior materials & notes, related correspondence			3.25				2.25	5.50	0.00	0.00	5.50
06/14/23	Incorporated final data into Annual Report; C-team planning re: Council mtg prep; Incorporated final data into Annual Report			0.50				5.00	5.50	0.00	0.00	5.50
06/15/23	Biweekly brand/comms check-in w/Advocacy & follow-up; Annual report - checked final numbers, finalized PDF, sent to OER, posted as mtg material; Cleaned up & sent notes from EERMC mtg; EERMC meeting			1.50			1.00	0.25	2.50	0.00	0.25	2.75
06/20/23	Posted Annual Report to website, updated homepage sliders							3.25	0.00	0.00	3.25	3.25
06/21/23	C-team planning re: edu activities; Drafted & sent EdComm agenda; Events planning check-in w/URI			1.75					1.75	0.00	0.00	1.75
06/22/23	IES Customer Listening Session + notes to C-team; Correspondence w/C-team re: EdComm info gathering, w/OER re: EdComm agenda, w/Advocacy re: deliverables review		2.00	0.75					2.75	0.00	0.00	2.75
06/26/23	Correspondence w/OER re: EdComm agenda; Correspondence w/URI re: events planning; Finalized & sent agenda & materials to EdComm; Prep & mtg w/J. Galluzzo (Optimal) re: education research; Requested Annual Report printing quotes from vendors			2.50				0.50	3.00	0.00	0.00	3.00
06/28/23	Updated Annual Report print/distribution plan; C-team planning re: edu activities; EdComm mtg prep			1.75				0.50	2.25	0.00	0.00	2.25
06/29/23	Updated Advocacy timeline, related correspondence; Correspondence w/stakeholders re: EdComm mtgs			1.25					1.25	0.00	0.00	1.25
	Total Hours	0.00	2.00	20.25	0.00	0.00	9.75	3.50	32.00	0.00	3.50	35.50
	Total Amount	\$0.00	\$322.00	\$3,260.25	\$0.00	\$0.00	\$1,569.75	\$290.50	\$5,152.00	\$0.00	\$290.50	\$5,442.50

Ralph Prah
7001 Stanhope Place, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 40
Invoice Date: June 30, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 06/01/23 through 06/30/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	10.75	\$206.00	\$2,214.50
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$2,214.50</u>

Ralph Prah

Services Performed 06/01/23 through 06/30/23

001 - EE Program Planning & Implementation

Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	006-00 Administrative	Travel Time	Sub-Total Regular Hrs.	Sub- Total Travel Hrs.	Total Hours
6/1/2023	WFD report		0.25				0.25	0.00	0.00
6/2/2023	WFD report, 3YP process		0.25				0.25	0.00	0.25
6/5/2023	C&I NTG study		0.25				0.25	0.00	0.25
6/6/2023	C&I custom impact eval; WFD report		0.50				0.50	0.00	0.25
6/7/2023	WFD report		0.25				0.25	0.00	0.50
6/11/2023	WFD report; C&I NTG study		1.00				1.00	0.00	0.25
6/12/2023	SEB proc eval report		0.50				0.00	0.00	1.00
6/13/2023	Small bus proc report		1.50				0.50	0.00	0.50
6/14/2023	C&I studies call; C&I NTG study; C&I electric impact eval		1.50				1.50	0.00	1.50
6/15/2023	custom elec impact eval, C&I NTG study		0.50				1.50	0.00	1.50
6/16/2023	SB proc report		1.50				0.50	0.00	0.50
6/17/2023	SB proc report		0.25				1.50	0.00	1.50
6/19/2023	custom electric impact eval		1.00				0.25	0.00	0.25
6/20/2023	custom impact evals		0.25				1.00	0.00	1.00
6/21/2023	custom impact evals		0.25				0.25	0.00	0.25
6/23/2023	custom impact evals		0.25				0.25	0.00	0.25
6/28/2023	Res issues; UDRH issue		0.75				0.25	0.00	0.25
							0.00	0.00	0.00
	Total Hours	0.00	10.75	0.00	0.00	0.00	10.75	0.00	10.75
	Total Amount	\$0.00	\$2,214.50	\$0.00	\$0.00	\$0.00	\$2,214.50	0.00	\$2,214.50



38 Bellevue Avenue, Suite 100
Newport, Rhode Island 02840

INVOICE

Invoice # 59
Date: 09/01/2023
Due On: 10/01/2023

RI Energy Efficiency Resource Management Council

00001-RI Energy Efficiency Resource Management Council

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	08/01/2023	Attention to Data Request responses. Review, finalize and file same with cover letter. Service to distribution list.	1.00	\$275.00	\$275.00
Service	08/10/2023	Emails: C-Team re: questions.	0.20	\$275.00	\$55.00
Service	08/11/2023	Emails: C-Team re: questions.	0.60	\$275.00	\$165.00
Service	08/18/2023	Emails: Questions re: contracts.	0.20	\$275.00	\$55.00
Service	08/28/2023	Review email and contract from client re: potential termination.	0.30	\$275.00	\$82.50
Service	08/30/2023	Emails: Client re: contract questions.	0.30	\$275.00	\$82.50
Service	09/01/2023	Attention to docket filing.	0.40	\$275.00	\$110.00
				Total	\$2,052.50

Detailed Statement of Account

Other Invoices

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
35	09/07/2023	\$2,052.50	\$0.00	\$2,052.50

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
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59	10/01/2023	\$825.00	\$0.00	\$825.00
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Outstanding Balance	\$2,000.00
Total Amount Outstanding	\$2,000.00

Please make all amounts payable to: Desautel Browning Law

Please pay within 30 days.



38 Bellevue Avenue, Suite 100
Newport, Rhode Island 02840

INVOICE

Invoice # 89
Date: 10/02/2023
Due On: 10/31/2023

RI Energy Efficiency Resource Management Council

00001-RI Energy Efficiency Resource Management Council

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	09/05/2023	Emails: PUC re: technical session. Review notice, question to client.	0.60	\$275.00	\$165.00
Service	09/07/2023	Attention to technical session materials.	0.40	\$275.00	\$110.00
Service	09/12/2023	Listened to and summarized 9/8/23 PUC meeting	2.50	\$275.00	\$687.50
Service	09/13/2023	Attention to monthly meeting agenda.	0.20	\$275.00	\$55.00
Service	09/20/2023	Emails: Attention to EE docket.	0.20	\$275.00	\$55.00
Service	09/24/2023	Attention to meeting agenda and materials.	0.20	\$275.00	\$55.00
Service	09/27/2023	Emails: Client re: vote language and questions.	0.40	\$275.00	\$110.00
				Total	\$1,237.50

Detailed Statement of Account

Other Invoices

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
59	10/01/2023	\$825.00	\$0.00	\$825.00

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
89	10/31/2023	\$1,237.50	\$0.00	\$1,237.50

Outstanding Balance	\$2,062.00
Total Amount Outstanding	\$2,062.00

Please make all amounts payable to: Desautel Browning Law

Please pay within 29 days.

Invoice For **RI Energy Efficiency Resource Management Council**
 RI Office of Energy Resources
 One Capitol Hill
 Providence, RI 02908

Invoice ID **541**
 Issue Date 08/31/2023
 Due Date 08/31/2023 (upon receipt)

Item Type	Description	Quantity	Unit Price	Amount
Service	Branding and Communications Development - 08/01/2023 - Communications / Ben Smith: Logo redesign and branding communications meeting prep. Finalize new updated FAQ using plain language.	3.00	\$150.00	\$450.00
Service	Branding and Communications Development - 08/02/2023 - Meeting Attendance / Christopher Hunter: Prep for meeting and EERMC rebrand status meeting to review FAQs, logo, and new website concepts	1.25	\$150.00	\$187.50
Service	Branding and Communications Development - 08/02/2023 - Meeting Attendance / Ben Smith: Advocacy Solutions / EERMC Review Brand Guidelines & Visual Identity	1.00	\$150.00	\$150.00
Service	Branding and Communications Development - 08/03/2023 - Meeting Attendance / Ben Smith: EERMC C-team check-in	0.50	\$150.00	\$75.00
Service	Branding and Communications Development - 08/03/2023 - Meeting Attendance / Christopher Hunter: Logo and branding timeline meeting	0.50	\$150.00	\$75.00
Service	Branding and Communications Development - 08/04/2023 - Communications / Christopher Hunter: Review domain name options	0.25	\$150.00	\$37.50
Service	Branding and Communications Development - 08/04/2023 - Communications / Ben Smith: Deep dive into available domain options.	2.50	\$150.00	\$375.00
Service	Branding and Communications Development - 08/07/2023 - Admin / Ben Smith: Develop talking points and presentation to EERMC full Council meeting on 8.17.	2.50	\$150.00	\$375.00
Service	Branding and Communications Development - 08/08/2023 - Communications / Ben Smith: EERMC presentation to Full Council on 8.17	2.50	\$150.00	\$375.00
Service	Branding and Communications Development - 08/08/2023 - Email Correspondence / Ben Smith: EERMC presentation to Full Council on 8.17	0.50	\$150.00	\$75.00

Service	Branding and Communications Development - 08/09/2023 - Communications / Ben Smith: Update draft talking points for Council explainer	2.50	\$150.00	\$375.00
Service	Branding and Communications Development - 08/10/2023 - Meeting Attendance / Ben Smith: Advocacy Solutions / EERMC bi-weekly check-in	0.50	\$150.00	\$75.00
Service	Branding and Communications Development - 08/10/2023 - Email Correspondence / Ben Smith: Compile examples of brand books and design products to provide a better idea of what deliverables will look like.	0.75	\$150.00	\$112.50
Service	Branding and Communications Development - 08/21/2023 - Meeting Attendance / Ben Smith: Ben/Harry	0.50	\$150.00	\$75.00
Service	Branding and Communications Development - 08/23/2023 - Meeting Attendance / Ben Smith: EERMC draft mission statement	1.00	\$150.00	\$150.00
Service	Branding and Communications Development - 08/24/2023 - Meeting Attendance / Ben Smith: EERMC billing call	0.50	\$150.00	\$75.00
Service	Branding and Communications Development - 08/30/2023 - Meeting Attendance / Ben Smith: EERMC branding and communications meeting	1.00	\$150.00	\$150.00

Amount Due \$3,187.50



From **Advocacy Solutions LLC**
1 Richmond Square
Suite 200N
Providence, RI 02906

Invoice For **RI Energy Efficiency Resource Management Council**
RI Office of Energy Resources
One Capitol Hill
Providence, RI 02908

Invoice ID **558**
Issue Date 09/30/2023
Due Date 09/30/2023 (upon receipt)

Item Type	Description	Quantity	Unit Price	Amount
Service	Branding and Communications Development - 09/13/2023 - Meeting Attendance / Christopher Hunter: Call with Rachel re: board presentation of mission, about and logo options	0.50	\$150.00	\$75.00
Service	Branding and Communications Development - 09/14/2023 - Meeting Attendance / Christopher Hunter: Attend EERMC board meeting, present brand recommendations	0.50	\$150.00	\$75.00
			Amount Due	\$150.00

INVOICE
Federal Tax ID# 03-0351557



Remit checks to:
Optimal Energy, Inc.
PO Box 74008680
Chicago, IL 60674-8680

Remit ACH transfer to:
ABA Routing Number 063100277
Account Number 898052466590
Email ACH/Wire remittance details to RemittanceNotifications@nv5.com

Remit Wire Transfers to:
ABA Routing Number 026009593
Account Number 898052466590
Swift Code INTL. BOFAUS3N

Steven Chybowski
Rhode Island Office of Energy Resources

July 31, 2023
Project No: 863223-0007525.00
Invoice No: 000000347157

Professional Services from July 1, 2023 to July 31, 2023

Phase 001 EE Prg Planning & Implementation Oversig

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	1.25	140.00	175.00	
Johnson, Craig	3.00	193.00	579.00	
Ross, Samuel	1.50	206.00	309.00	
Totals	5.75		1,063.00	
Total Labor				1,063.00
		Total this Task		\$1,063.00

Task 02 Implementation Oversight and Plan Develo

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	79.00	140.00	11,060.00	
Johnson, Craig	67.75	193.00	13,075.75	
Ross, Samuel	3.50	206.00	721.00	
Totals	150.25		24,856.75	
Total Labor				24,856.75

Consultants

Glenn Reed dba: GDR Consulting	2,832.50		
CORE ENERGY INSIGHTS INC.	868.50		
EcoMetric Consulting, LLC	1,236.00		
Energy Futures Group, Inc.	1,390.50		
JENNIFER CHIODO DBA: JLC CONSULTING, LLC	566.50		
RALPH PRAHL	1,751.00		
Total Consultants	8,645.00		8,645.00
	Total this Task		\$33,501.75

Task 03 Education Initiatives

Professional Personnel

	Hours	Rate	Amount
Johnson, Craig	.25	193.00	48.25
Ross, Samuel	3.00	206.00	618.00
Totals	3.25		666.25
Total Labor			666.25

Consultants

Rachel Sholly			4,025.00
Total Consultants			4,025.00

Total this Task \$4,691.25

Total this Phase \$39,256.00

Phase 002 System Reliability Procurement

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount
Ross, Samuel	1.00	206.00	206.00
Totals	1.00		206.00
Total Labor			206.00

Total this Task \$206.00

Task 02 Plan Development and Oversight

Professional Personnel

	Hours	Rate	Amount
Ross, Samuel	1.00	206.00	206.00
Totals	1.00		206.00
Total Labor			206.00

Total this Task \$206.00

Total this Phase \$412.00

Phase 003 Regulatory Proceedings

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount
Johnson, Craig	2.00	193.00	386.00
Ross, Samuel	5.50	206.00	1,133.00
Totals	7.50		1,519.00
Total Labor			1,519.00

Total this Task \$1,519.00

Task 02 Develop Technical Materials

Professional Personnel

	Hours	Rate	Amount
Caesar, Adrian	2.00	140.00	280.00

Project	863223-0007525.00	Rhode Island EERMC - 2023		Invoice	000000347157
	Johnson, Craig		10.50	193.00	2,026.50
	Ross, Samuel		12.50	206.00	2,575.00
	Totals		25.00		4,881.50
	Total Labor				4,881.50
				Total this Task	\$4,881.50
				Total this Phase	\$6,400.50

Phase	004	Council Sponsored Meetings and Materials			
Task	01	Meeting Attendance			
Professional Personnel					
			Hours	Rate	Amount
	Caesar, Adrian		2.25	140.00	315.00
	Johnson, Craig		3.00	193.00	579.00
	Ross, Samuel		3.00	206.00	618.00
	Totals		8.25		1,512.00
	Total Labor				1,512.00
				Total this Task	\$1,512.00

Task	02	Develop Technical Materials			
Professional Personnel					
			Hours	Rate	Amount
	Caesar, Adrian		8.00	140.00	1,120.00
	Johnson, Craig		9.50	193.00	1,833.50
	Ross, Samuel		4.00	206.00	824.00
	Totals		21.50		3,777.50
	Total Labor				3,777.50
	Reimbursable Expenses				
	Misc Reimbursable Expense				119.99
	Total Reimbursables				119.99
				Total this Task	\$3,897.49

Task	03	Other Council Responsibilities			
Professional Personnel					
			Hours	Rate	Amount
	Johnson, Craig		6.25	193.00	1,206.25
	Mosenthal, Philip		1.50	220.00	330.00
	Totals		7.75		1,536.25
	Total Labor				1,536.25
	Consultants				
	Rachel Sholly				322.00
	Total Consultants				322.00
				Total this Task	\$1,858.25
				Total this Phase	\$7,267.74

Phase	005	Research, Analysis, and Other Council Su			
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Professional Personnel

	Hours	Rate	Amount	
Johnson, Craig	3.50	193.00	675.50	
Mosenthal, Philip	.25	220.00	55.00	
Ross, Samuel	8.50	206.00	1,751.00	
Totals	12.25		2,481.50	
Total Labor				2,481.50
Total this Phase				\$2,481.50

Phase 007 EERMC Intern

Additional Fees

Monthly Intern Fee (July 2023)			3,750.00	
Total Additional Fees			3,750.00	3,750.00
Total this Phase				\$3,750.00

Billing Limits

	Current	Prior	To-Date	
Total Billings	59,567.74	308,296.25	367,863.99	
Limit			717,025.00	
Remaining			349,161.01	
Total this Invoice				\$59,567.74

Billings To Date

	Current	Prior	Total
Labor	42,705.75	209,277.25	251,983.00
Consultant	12,992.00	88,519.00	101,511.00
Expense	119.99	3,000.00	3,119.99
Add-on	3,750.00	7,500.00	11,250.00
Totals	59,567.74	308,296.25	367,863.99

Billing Backup

Wednesday, August 23, 2023

NV5, Inc. Invoice 000000347157 Dated 7/31/2023 1:22:06 PM

Phase	001	EE Prg Planning & Implementation Oversig
Task	01	Council Representation

Professional Personnel

		Hours	Rate	Amount
Caesar, Adrian	7/27/2023	1.25	140.00	175.00
	July EE TWG Meeting - Econ impact multipliers, market saturation study, EE Plan development updates, regional benchmarking analysis			
Johnson, Craig	7/7/2023	1.25	193.00	241.25
	Bi-weekly check-in call w/ RIE and OER, meeting prep.			
Johnson, Craig	7/18/2023	.50	193.00	96.50
	Bi-weekly check-in meeting w/ OER and RIE.			
Johnson, Craig	7/27/2023	1.25	193.00	241.25
	EE TWG meeting.			
Ross, Samuel	7/27/2023	1.50	206.00	309.00
	EETWG			
	Totals	5.75		1,063.00
	Total Labor			1,063.00
			Total this Task	\$1,063.00

Task	02	Implementation Oversight and Plan Develo
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Professional Personnel

		Hours	Rate	Amount
Caesar, Adrian	7/5/2023	5.50	140.00	770.00
	Updated 2024-2026 3YP review; EVT contractor incentive model overview - VFD measures; EM&V Study review - C&I NTG/FRSO study sample plan, Workforce Needs Assessment Final report, RICE and RICG impact evaluation site report review; 2024-2026 EE Plan BCR Model analysis			
Caesar, Adrian	7/6/2023	8.25	140.00	1,155.00
	Updated 2024-2026 3YP review; 2024-2026 EE Plan BCR Model analysis - program/sector level comparisons, end use savings analysis, net and gross cost trends; EM&V check in - Custom Gas/Elec impact evaluation site report results, TRM-BCM mapping development; EMV study tracker updates			
Caesar, Adrian	7/7/2023	4.50	140.00	630.00
	2024-2026 EE Plan BCR Model analysis - program/sector level comparisons, end use savings analysis, net and gross cost trends, structural BCR model changes and feature updates; C&I sector team agenda development			
Caesar, Adrian	7/10/2023	3.00	140.00	420.00
	2024-2026 EE Plan analysis - updated BCR model review, program-level EE and ADM program comps, MPS savings potential analysis, cost-to-achieve and net to gross comparisons; RI EWG kickoff notes and 2022 EWG Final report review			
Caesar, Adrian	7/11/2023	7.25	140.00	1,015.00
	2024-2026 EE Plan analysis - updated BCR model review, program-level EE and ADM program comps, MPS savings potential analysis, cost-to-achieve and net to gross comparisons, MPS/Actual/Plan measure and end use mapping, Targets and plan end use savings deltas and waterfalls			

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000347157
Caesar, Adrian		7/12/2023	7.00	140.00	980.00	
	2024-2026 EE Plan analysis - updated BCR model review, program-level EE and ADM program comps, MPS savings potential analysis, cost-to-achieve and net to gross comparisons, MPS/Actual/Plan measure and end use mapping, Targets and plan end use savings deltas and waterfalls, TRC/incentive and savings distribution over 3YP term comps; RICE2021 site report comment responses; C&I EM&V mtg. prep and study tracker review/updates; updated NRNC data collection tools and stage 3 workplan review					
Caesar, Adrian		7/13/2023	6.25	140.00	875.00	
	July C&I sector team call/prep; 2024-2026 EE Plan analysis - updated BCR model review, program-level EE and ADM program comps, MPS savings potential analysis, cost-to-achieve and net to gross comparisons, MPS/Actual/Plan measure and end use mapping, Targets and plan end use savings deltas and waterfalls, TRC/incentive and savings distribution over 3YP term comps; RICE2021 site report comment responses					
Caesar, Adrian		7/14/2023	2.50	140.00	350.00	
	2024-2026 EE Plan analysis - updated BCR model review, program-level EE and ADM program comps, MPS savings potential analysis, cost-to-achieve and net to gross comparisons, MPS/Actual/Plan measure and end use mapping, Targets and plan end use savings deltas and waterfalls, TRC/incentive and savings distribution over 3YP term comps; EE plan analysis check-in					
Caesar, Adrian		7/19/2023	3.50	140.00	490.00	
	2024-2026 EE Plan Analysis - measure-level and end use savings/cost trend comps by program, C&I participation trends and targets, distribution of spending and savings trends, lighting and lighting controls saturation, non incentive plan costs					
Caesar, Adrian		7/20/2023	4.75	140.00	665.00	
	2024-2026 EE Plan Analysis - measure-level and end use savings/cost trend comps by program, C&I participation trends and targets, distribution of spending and savings trends, lighting and lighting controls saturation, non incentive plan costs and WFD spending; preliminary Q1 program data review and report development					
Caesar, Adrian		7/21/2023	2.25	140.00	315.00	
	IECC 2024 Codes and standards support discussion; 2024-2026 EE Plan Analysis - measure-level cost trend comps by program, distribution of spending and savings trends, lighting and lighting controls saturation, non incentive plan costs and WFD spending; preliminary Q1 program data review and report development; Plan BCR model review and questions for RI Energy; RI NRNC baseline study final workplan review; EM&V study tracker updates					
Caesar, Adrian		7/24/2023	7.25	140.00	1,015.00	
	2024-2026 EE Plan quantitative analysis - measure level delta analysis, BC model to actual data mapping development, measure impact factor review, BCR Model QA/QC and function/input checks; RI Codes and standards update discussion;					
Caesar, Adrian		7/25/2023	3.25	140.00	455.00	
	July EERMC mtg. follow ups - energy code training and C&S updates; 2024-2026 EE Plan quantitative analysis - measure level delta analysis, measure impact factor review, BCR Model QA/QC and function/input checks; RICE/RICG 2021 impact evaluation, site report, and preliminary results review; Small Business process evaluation updated final report review; EM&V tracker review and Residential EMV meeting agenda development					
Caesar, Adrian		7/26/2023	4.50	140.00	630.00	

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000347157
		Residential EM&V meeting; EM&V study review - RICE/RICG 2021 impact evaluation, site report, and preliminary results , Small Business process evaluation updated final report, HP market characterization study survey instruments and Elec Resist to HP plan status; Preliminary Q2 Res and C&I data report development and data review				
Caesar, Adrian	7/28/2023	5.25	140.00		735.00	
		2024-2026 EE Plan quantitative analysis - measure level delta analysis, measure impact factor review, BCR Model QA/QC and function/input checks; RICE/RICG 2021 impact evaluation, site report, and preliminary gas results review; Measure Life Update study results and memo review				
Caesar, Adrian	7/31/2023	4.00	140.00		560.00	
		RI State energy code kick off call and follow ups; EM&V study review - RICE 2021 custom impact evaluation site report , Measure Life Review study draft report and supplemental documentation workbook, HP market characterization, final Workforce Needs assessment; Residential/IES data report and detailed quarterly data review				
Johnson, Craig	7/6/2023	4.75	193.00		916.75	
		First Draft 3YP Review - Coordinate with team on plan to review BC Models. Work on/review of sector and program level comparisons of savings and costs.				
Johnson, Craig	7/7/2023	5.25	193.00		1,013.25	
		Catchup on Equity Working Group activities. First Draft 3YP Review - Begin review of BC models for residential and income eligible programs.				
Johnson, Craig	7/10/2023	3.25	193.00		627.25	
		Review meeting notes and takeaways from Income Eligible and Residential Customer Listening Sessions and Q2 IES BP meeting. Review meeting notes from June EE TWG meeting related to plan development. 2024-2026 Plan Review - Continue review of program level comps to inform deeper level comparison review for residential and income eligible programs.				
Johnson, Craig	7/11/2023	1.50	193.00		289.50	
		Sector Team - Review I&O tracker and May data, draft and distribute sector team meeting agenda.				
Johnson, Craig	7/12/2023	4.75	193.00		916.75	
		3YP Review - Conduct end-use level comparison between MPS and first draft 3YP for Residential and Low Income Programs.				
Johnson, Craig	7/13/2023	4.75	193.00		916.75	
		3YP Review - Working session with Adrian and Jordan to review sector level end use savings analysis and to strategize on other analyses to conduct in preparation of Council meeting. Sector Team Work - Monthly Residential Sector Team Call, associated meeting prep.				
Johnson, Craig	7/14/2023	4.25	193.00		820.25	
		3YP Review - Continue work on reviewing end-use level savings comparisons between Targets and 3YP for the residential and income eligible sector. Review and analysis on residential and income eligible sector cost-to-achieve.				
Johnson, Craig	7/17/2023	4.75	193.00		916.75	
		3YP Review - Coordination with subs on program and measure level plan review. Develop summary tables with comparisons for measures for each program.				
Johnson, Craig	7/18/2023	6.00	193.00		1,158.00	
		Res Sector Team - Review notes from July res sector team meeting, consolidate follow-up items and distribute to teams. Check-in on tasks w/ Richard. 3YP Review - Continue BC Model review and analysis on first draft of 3YP, including review of electric and gas heating equipment and income eligible weatherization.				
Johnson, Craig	7/19/2023	8.00	193.00		1,544.00	

Project	863223-0007525.00	Rhode Island EERMC - 2023	Invoice	000000347157
	Equity support - Scope out assignment for Jordan to conduct analysis of planned and actual achievement for IE SF and MF programs for past five years. 3YP Review - Continue review of 3YP BC models for residential and income eligible programs, including analysis on top savings measures comparisons for residential and income eligible programs for plan compared to 2022 actuals and 2023 plan, e-mails with subs re: same.			
Johnson, Craig	7/20/2023	3.75	193.00	723.75
	3YP Review - Outline task for Jordan to review PUC data requests from last Plan Docket to inform additional areas of analysis on first draft plan review. Continue review of residential plan data to inform talking points at Council meeting.			
Johnson, Craig	7/21/2023	4.50	193.00	868.50
	3YP Review - BC Model review - review and consolidate comments from Glenn on Res and IE program data. Continue own review of top measures for each residential and income eligible program.			
Johnson, Craig	7/24/2023	2.50	193.00	482.50
	3YP Review - continue review of inputs for top res and IE measures, focusing on savings and cost assumptions.			
Johnson, Craig	7/26/2023	5.75	193.00	1,109.75
	Internal Res sector team check-in w/ subs - discussed upcoming residential sector team agenda and scheduling, 3YP and upcoming 2024 annual plan review, and metrics to recommend in contract extension talks for res retrofit vendors. Prep and planning re: same. 3YP Review - continue review of inputs for top res and IE measures. EM&V - Review heat pump study survey guides, emails w/ EM&V team regarding same.			
Johnson, Craig	7/27/2023	4.00	193.00	772.00
	Res Sector Team - Review meeting notes and prep potential meeting topics and content for August sector team meeting. 3YP Review - Finalize comments on first draft of 3YP BC models for residential and income eligible sectors.			
Ross, Samuel	7/5/2023	.75	206.00	154.50
	coordinate team efforts on BC model, table reviews and feedback consolidation			
Ross, Samuel	7/11/2023	1.00	206.00	206.00
	coord. cont quant review of BC models, newsletter distrib, other work areas.			
Ross, Samuel	7/12/2023	.50	206.00	103.00
	check in with team on BC model review initial findings, next steps for deeper review			
Ross, Samuel	7/21/2023	.75	206.00	154.50
	follow ups from EERMC, coord team to prepare for final stretch of 3YP quant review and QA			
Ross, Samuel	7/28/2023	.50	206.00	103.00
	BC model review & comments finalization check in			
	Totals	150.25		24,856.75
	Total Labor			24,856.75
			Total this Task	\$33,501.75

Task 03 Education Initiatives

Professional Personnel

		Hours	Rate	Amount
Johnson, Craig	7/10/2023	.25	193.00	48.25

Project	863223-0007525.00	Rhode Island EERMC - 2023	Invoice	000000347157
Review and respond to questions re: updated public awareness campaign RFP and timeline.				
Ross, Samuel	7/5/2023	.25	206.00	51.50
check in on educ efforts and next steps				
Ross, Samuel	7/13/2023	1.00	206.00	206.00
Advocacy Solutions check in				
Ross, Samuel	7/19/2023	1.00	206.00	206.00
advocacy solutions branding disc				
Ross, Samuel	7/27/2023	.75	206.00	154.50
advocacy solutions mtg, prep re: same				
Totals		3.25		666.25
Total Labor				666.25
			Total this Task	\$4,691.25
			Total this Phase	\$39,256.00

Phase 002 System Reliability Procurement

Task 01 Council Representation

Professional Personnel

		Hours	Rate	Amount
Ross, Samuel	7/19/2023	1.00	206.00	206.00
attend SRP TWG				
Totals		1.00		206.00
Total Labor				206.00
			Total this Task	\$206.00

Task 02 Plan Development and Oversight

Professional Personnel

		Hours	Rate	Amount
Ross, Samuel	7/25/2023	1.00	206.00	206.00
SRP 3YP discussion with Carrie Gill				
Totals		1.00		206.00
Total Labor				206.00
			Total this Task	\$206.00
			Total this Phase	\$412.00

Phase 003 Regulatory Proceedings

Task 01 Council Representation

Professional Personnel

		Hours	Rate	Amount
Johnson, Craig	7/24/2023	1.75	193.00	337.75
Monitor Future of Gas docket stakeholder committee meeting.				
Johnson, Craig	7/27/2023	.25	193.00	48.25

Project	863223-0007525.00	Rhode Island EERMC - 2023	Invoice	000000347157
	Monitor PUC Open Meeting re: LCP Standards updates.			
Ross, Samuel	7/24/2023	5.50	206.00	1,133.00
	attend future of gas docket			
	Totals	7.50		1,519.00
	Total Labor			1,519.00
			Total this Task	\$1,519.00

Task 02 Develop Technical Materials

Professional Personnel

		Hours	Rate	Amount
Caesar, Adrian	7/5/2023	.75	140.00	105.00
	EERMC 3YP Targets filing PUC information request; updated LCP Standards and PUC responses to comments review			
Caesar, Adrian	7/21/2023	.50	140.00	70.00
	DPUC information request review			
Caesar, Adrian	7/21/2023	.25	140.00	35.00
	PUC Memo on Updated LCP Standards review			
Caesar, Adrian	7/31/2023	.50	140.00	70.00
	PUC Data request responses - Market Potential Study refresh results			
Johnson, Craig	7/5/2023	2.50	193.00	482.50
	Initial high-level review of updated version of LCP Standards. Initial review of PUC IRs on Targets.			
Johnson, Craig	7/6/2023	1.50	193.00	289.50
	Continue review of updated version of LCP Standards - compare updated version with EERMC comments and RIE comments.			
Johnson, Craig	7/10/2023	.25	193.00	48.25
	Coordinate on deadlines for submitting responses to PUC DR on EERMC filed Targets, as well as next steps on LCP Standards updates.			
Johnson, Craig	7/11/2023	2.75	193.00	530.75
	LCP Standards Update Review - complete review of updated LCP standards, including noting responsiveness to Council comments, as well as a review of responsiveness to OER and RIE comments. Prepare thoughts and key takeaways for inclusion in July Council update, as well as for eventual filing of comments back to PUC.			
Johnson, Craig	7/13/2023	1.50	193.00	289.50
	LCP Standards Update Review - Review Sam's comments on latest iteration, discussion re: same.			
Johnson, Craig	7/14/2023	1.00	193.00	193.00
	LCP Standards Update Review - Working session with Sam to review and finalize comments to PUC on latest iteration of LCP Standards update. Prepare final document to send to Council's legal team for filing.			
Johnson, Craig	7/20/2023	1.00	193.00	193.00
	Future of Gas Docket - Review draft nomination letter for participation in docket technical working group. Provide comments and feedback, discussions re: same with Sam.			
Ross, Samuel	7/11/2023	.75	206.00	154.50
	Review, corresp with Dunsky re: PUC data requests re: EERMC targets			
Ross, Samuel	7/12/2023	2.00	206.00	412.00
	thorough review of LCP redlines from commission, including review of C. Johnson initial comments and proposed continued input to Commission			
Ross, Samuel	7/13/2023	1.50	206.00	309.00
	continued review of LCP redlines, incl. review of reply comments from C Johnson, and additional edits.			

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000347157
Ross, Samuel		7/14/2023	1.00	206.00	206.00	
		finalization of LCP comments				
Ross, Samuel		7/17/2023	.25	206.00	51.50	
		check in with Dunsky on PUC data request				
Ross, Samuel		7/19/2023	1.50	206.00	309.00	
		populate rough draft word doc with future of gas TWG nomination content				
Ross, Samuel		7/21/2023	2.00	206.00	412.00	
		review comments on, finalize, and distribute Future of Gas TWG nomination to Councilors for review, then PUC				
Ross, Samuel		7/24/2023	2.50	206.00	515.00	
		prep for, debrief on future of gas docket stakeholder meeting				
Ross, Samuel		7/28/2023	1.00	206.00	206.00	
		review of Dunsky data request responses for PUC				
		Totals	25.00		4,881.50	
		Total Labor				4,881.50
					Total this Task	\$4,881.50
					Total this Phase	\$6,400.50

Phase 004 Council Sponsored Meetings and Materials

Task 01 Meeting Attendance

Professional Personnel

			Hours	Rate	Amount	
Caesar, Adrian		7/20/2023	2.25	140.00	315.00	
		June EERMC Meeting				
Johnson, Craig		7/20/2023	3.00	193.00	579.00	
		Attend and present technical materials at July ExCom and Council meetings.				
Ross, Samuel		7/20/2023	3.00	206.00	618.00	
		remote attendance at, participation in EERMC and ExCom meetings				
		Totals	8.25		1,512.00	
		Total Labor				1,512.00
					Total this Task	\$1,512.00

Task 02 Develop Technical Materials

Professional Personnel

			Hours	Rate	Amount	
Caesar, Adrian		7/10/2023	.50	140.00	70.00	
		July EERMC mtg. materials development - 2024-2026 EE plan review and analysis, LCP updates, EERMC budget and education RFP/approval, EERMC Newsletter				
Caesar, Adrian		7/11/2023	.50	140.00	70.00	
		July EERMC mtg. materials development - 2024-2026 EE plan review and analysis, LCP updates, EERMC budget and education RFP/approval, EERMC Newsletter				
Caesar, Adrian		7/12/2023	1.00	140.00	140.00	
		July EERMC mtg. materials development - 2024-2026 EE plan review and analysis data visualizations				

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000347157
Caesar, Adrian		7/13/2023	2.50	140.00	350.00	
		July EERMC mtg. materials development - 2024-2026 EE plan review and analysis data visualizations				
Caesar, Adrian		7/14/2023	2.75	140.00	385.00	
		July EERMC mtg. materials development - 2024-2026 EE plan review and analysis data visualizations, EERMC budget updates presentation, LCP standards updates				
Caesar, Adrian		7/19/2023	.50	140.00	70.00	
		July EERMC mtg. prep				
Caesar, Adrian		7/20/2023	.25	140.00	35.00	
		July EERMC mtg. prep				
Johnson, Craig		7/7/2023	.50	193.00	96.50	
		Review draft agenda for July Council meeting.				
Johnson, Craig		7/10/2023	1.25	193.00	241.25	
		July Council meeting - review agenda, provide comment, assign lead presentation roles, and strategize with team on content for C-Team items.				
Johnson, Craig		7/11/2023	2.00	193.00	386.00	
		July Council Meeting - Coordinate on presentation content for 3YP review with Jordan and Adrian. Draft presentation content for LCP Standards update.				
Johnson, Craig		7/12/2023	.75	193.00	144.75	
		July Council Meeting - Coordinate with team on presentation content and development. Coordinate with OER on agenda restructuring and Councilor attendance.				
Johnson, Craig		7/13/2023	.25	193.00	48.25	
		Review and discuss July ExCom agenda with Sam.				
Johnson, Craig		7/14/2023	2.75	193.00	530.75	
		July Council Materials - review Sam's comments on LCP Update slide deck, make modifications to slide deck based on latest round of feedback and final input to send to PUC, finalize deck. Review and finalize 2024 budget slide deck. Work on assembling slides for 3YP review, working session w/ Adrian re: same, prep and send draft version to be updated to OER.				
Johnson, Craig		7/18/2023	1.00	193.00	193.00	
		July Council Materials - Final review of materials for July Council meeting, discussion w/ Sam about same. Finish updated version of 3YP review deck.				
Johnson, Craig		7/19/2023	.50	193.00	96.50	
		July Council Materials - Final review of materials and discussion of presenting roles with team.				
Johnson, Craig		7/20/2023	.50	193.00	96.50	
		July Council Materials - prep talking points for C-Team presentations.				
Ross, Samuel		7/10/2023	.75	206.00	154.50	
		prep for, team meeting on Council materials work plan for week				
Ross, Samuel		7/14/2023	2.00	206.00	412.00	
		updating Council budget deck, review and finalize LCP deck, coordinating timing of other materials finalization				
Ross, Samuel		7/18/2023	.50	206.00	103.00	
		morning check in to confirm finalization of all council materials, agendas, etc.				
Ross, Samuel		7/19/2023	.75	206.00	154.50	
		coordinate attendance plans, coverage for excom and EERMC topics				
		Totals	21.50		3,777.50	
		Total Labor				3,777.50

Total this Task \$3,897.49

 Task 03 Other Council Responsibilities

Professional Personnel

		Hours	Rate	Amount
Johnson, Craig	7/6/2023	1.00	193.00	193.00
Coordinate with Steve on time to review C-Team comments on first draft of EE Implementation RFP. Begin review of RFP. Initial review of C-Team comments.				
Johnson, Craig	7/11/2023	1.75	193.00	337.75
Review EE Implementation RFP - consolidate and review C-Team comments, work on summarizing key takeaways.				
Johnson, Craig	7/12/2023	2.00	193.00	386.00
Review EE Implementation RFP - finalize review and consolidation of summarizing key takeaways.				
Johnson, Craig	7/13/2023	1.00	193.00	193.00
Review EE Implementation RFP - Meeting with OER to preview C-Team's feedback on our review.				
Johnson, Craig	7/21/2023	.50	193.00	96.50
Final review of first draft of EE Implementation RFP, send comments and key themes to OER.				
Mosenthal, Philip	7/6/2023	1.50	220.00	330.00
Rev. implementation RFP				
Totals		7.75		1,536.25
Total Labor				1,536.25
Total this Task				\$1,858.25
Total this Phase				\$7,267.74

 Phase 005 Research, Analysis, and Other Council Su

Professional Personnel

		Hours	Rate	Amount
Johnson, Craig	7/10/2023	1.75	193.00	337.75
Review and provide comments on EERMC Newsletter. Check-in meeting with Jordan on next steps, plan for distributing, and drafting e-mail to Councilors.				
Johnson, Craig	7/13/2023	.50	193.00	96.50
Review latest iteration of Council ByLaws and prepare update for Council.				
Johnson, Craig	7/17/2023	.50	193.00	96.50
New Council member orientation meeting.				
Johnson, Craig	7/18/2023	.50	193.00	96.50
Review Council ByLaws, prep thoughts on next steps for ExCom meeting.				
Johnson, Craig	7/26/2023	.25	193.00	48.25
Council Orientation with Jordan Day				
Mosenthal, Philip	7/25/2023	.25	220.00	55.00
emails re codes & standards, workforce development strategies				
Ross, Samuel	7/11/2023	.50	206.00	103.00
coord Jordan Day Councilor Orientation				
Ross, Samuel	7/13/2023	2.00	206.00	412.00
Meet with Emma Rodvien (PUC) to gain general insight to ensure Council 3YP review process and outcomes are provided in a form that is as useful as possible to the Commission; EE Impl RFP mtg with OER				

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000347157
Ross, Samuel		7/17/2023	1.75	206.00	360.50	
		Councilor orientation with Councilor De La Cruz, prep re: same; follow up corresp.				
Ross, Samuel		7/18/2023	1.50	206.00	309.00	
		prep for, attend Councilor 2-on-1 with Councilors Case and AnderBois				
Ross, Samuel		7/21/2023	.75	206.00	154.50	
		EE Plan check in and discussion with Emily from Acadia center				
Ross, Samuel		7/26/2023	2.00	206.00	412.00	
		EWG meeting with Councilor De La Cruz; orientation call with Councilor Day				
		Totals	12.25		2,481.50	
		Total Labor				2,481.50
					Total this Phase	\$2,481.50
					Total this Project	\$55,817.74
					Total this Report	\$55,817.74



Tax Invoice

Invoice Date

July 7, 2023

Invoice no.

03839-34314568

To

Samuel Ross

Optimal-BD@nv5.com

BAFlKqJ7seI

Subscriptions**Canva Pro**

iAFn-zOANys

July 7, 2023

\$119.99

Total

\$119.99

Includes tax

\$0.00

Total charged

\$119.99

Paid with MasterCard **** 0512

Please retain for your records.

Canva US Inc.

2140 S Dupont Highway Camden Kent Delaware 19934 United States

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Margie Lynch/Core Energy Insights, Inc.
4445 E. Hoback River Road, Jackson, WY 83001

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 7-2023*
Invoice Date: *July 31, 2023*
OEI Project #: *7525*

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 07/01/23 through 07/31/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	4.50	\$193.00	\$868.50
LABOR - Travel Hours	0.00	\$96.50	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$868.50</u>

Margie Lynch/Core Energy Insights, Inc.
Services Performed 07/01/23 through 07/31/23

		001 - EE Program Planning & Implementation						
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
7/6/2023	Discussed EERMC Public Forum strategy w/R. Sholly			0.50		0.00	0.00	0.00
7/10/2023	Reviewed Equity Working Group meeting notes and compiled suggested agenda topics for next meeting; began review of May data report		0.75			0.50	0.00	0.50
7/13/2023	Participated in Res Sector Team meeting		1.00			0.75	0.00	0.75
7/17/2023	Discussed EERMC Public Forum agenda w/URI team			0.50		1.00	0.00	1.00
7/26/2023	Agenda planning for 8/8 EWG; C-Team meeting to prep for plan review and next Res Sector Team meeting		0.75			0.50	0.00	0.50
7/27/2023	Suggested agenda topics for August EWG		0.25			0.75	0.00	0.75
7/31/2023	Began draft of 8.8 Equity Working Group presentation		0.75			0.25	0.00	0.25
						0.75	0.00	0.75
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
	Total Hours	0.00	3.50	1.00	0.00	4.50	0.00	4.50
	Total Amount	\$0.00	\$675.50	\$193.00	\$0.00	\$868.50	0.00	\$868.50



EcoMetric Consulting, LLC
555 Exton Cms
Exton, PA 19341
610.400.8600
admin@ecometricconsulting.com

INVOICE

BILLED TO

Sam Ross
Optimal Energy - NV5
10600 Route 116, Suite 3
Hinesburg, VT 05461

TOTAL DUE

\$1,236.00

Project Name RI EERMC Consultant
Project # 7525
Invoice # 1029-P7-23
Billing Period 07/01/2023 - 07/28/2023

Invoice Date 07/31/2023
Due Date 08/30/2023
Payment Terms Net 30

Task Number	Description	Amount
001-02	Implementation Oversight & Plan Development	\$1,236.00

Subtotal \$1,236.00

Invoice Total \$1,236.00

Invoice Number **1029-P7-23**
 Period **07/01/2023 - 07/28/2023**

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EERMC Consultant	Implementation Oversight & Plan D	Salil Gogte	Partner	2023-07	0	\$ 220.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Michael Frischmann	Partner	2023-07	0	\$ 220.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Michael Honeychuck	Managing Consultant	2023-07	4	\$ 206.00	\$ 824.00
RI EERMC Consultant	Implementation Oversight & Plan D	Bitul Sinha	Managing Consultant	2023-07	2	\$ 206.00	\$ 412.00
RI EERMC Consultant	Implementation Oversight & Plan D	Cory Read	Data Scientist	2023-07	0	\$ 206.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Jake Fuller	Managing Consultant	2023-07	0	\$ 206.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Mary George	Sr Engineer	2023-07	0	\$ 166.00	\$ -
Total					6.00		\$ 1,236.00

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EERMC Consultant		0 Salil Gogte	Partner	2023-07	0	\$ 220.00	\$ -
RI EERMC Consultant		0 Michael Frischmann	Partner	2023-07	0	\$ 220.00	\$ -
RI EERMC Consultant		0 Michael Honeychuck	Managing Consultant	2023-07	0	\$ 206.00	\$ -
RI EERMC Consultant		0 Bitul Sinha	Managing Consultant	2023-07	0	\$ 206.00	\$ -
RI EERMC Consultant		0		2023-07	0		\$ -
Total					-		\$ -

fname	local_date	hours	task	notes
Bitul Sinha	7/5/2023	2	Implementation Oversight & Plan Development	Electric report review
Michael Honeychuck	7/5/2023	1	Implementation Oversight & Plan Development	Invoice & discussions
Michael Honeychuck	7/6/2023	0.5	Implementation Oversight & Plan Development	Monthly check-in with Adrian
				Monthly C&I call with RI Energy & C-Team Emails with Adrian
Michael Honeychuck	7/12/2023	2	Implementation Oversight & Plan Development	Call with Guidehouse about TRM updates
Michael Honeychuck	7/26/2023	0.5	Implementation Oversight & Plan Development	Monthly residential call with RI Energy & C-Team

Energy Futures Group, Inc.
PO Box 587
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 5892
Invoice Date: July 31, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 07/01/2023 through 07/31/2023			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	6.75	\$206.00	\$1,390.50
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$1,390.50</u>

Energy Futures Group, Inc.

Services Performed 07/01/2023 through 07/31/2023

		001 - EE Program Planning & Implementation						
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
7/3/2023	Send info to RIE re: VFDs		0.25			0.00	0.00	0.00
7/6/2023	RI PA SOW review		1.00			0.25	0.00	0.25
7/7/2023	Review RI PA RFP SOW		2.00			1.00	0.00	1.00
7/13/2023	C&I sector meeting		1.00			2.00	0.00	2.00
7/13/2023	Res sector meeting		1.00			1.00	0.00	1.00
7/18/2023	Check in with Craig Johnson.		0.25			1.00	0.00	1.00
7/19/2023	Review plan comps		0.50			0.25	0.00	0.25
7/26/2023	Internal planning call		0.75			0.50	0.00	0.50
						0.75	0.00	0.75
						0.00	0.00	0.00
	Total Hours	0.00	6.75	0.00	0.00	6.75	0.00	6.75
	Total Amount	\$0.00	\$1,390.50	\$0.00	\$0.00	\$1,390.50	0.00	\$1,390.50

GDR Consulting
576 Rutland St
Carlisle MA 01741

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 7R
Invoice Date: July 31, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 07/01/23 through 07/31/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	13.75	\$206.00	\$2,832.50
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$2,832.50</u>

GDR Consulting**Services Performed 07/01/23 through 07/31/23**

		001 - EE Program Planning & Implementation						
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
						0.00	0.00	0.00
7/5/2023	Review May Residential reporting. Enter comments into RI Tracker		1.25			1.25	0.00	1.25
7/13/2023	Attend monthly RI Sector Team call, follow up on MA HP rebates and QA/QC and on RI Products program activity		1.50			1.50	0.00	1.50
7/13/2023	Initial comments on 2024 Plan savings and spending numbers		1.75			1.75	0.00	1.75
7/14/2023	Continued review and comments on 2024 Plan savings and spending numbers		1.50			1.50	0.00	1.50
7/17/2023	Develop data template for 2024 BCR model review		0.75			0.75	0.00	0.75
7/20/2023	Review and compile comments on 2024 Plan electric and gas BCR models		1.50			1.50	0.00	1.50
7/21/2023	Review and compile comments on 2024 Plan electric and gas BCR models		1.75			1.75	0.00	1.75
7/24/2023	Review of ENERGY STAR Most Efficient products and highlighting need to assess new opportunities and revise NTG assumptions		0.25			0.25	0.00	0.25
7/26/2023	Participate in monthly Residential EM&V call, prep and follow up on program lighting status and MA lighting phase out plans		1.00			1.00	0.00	1.00
7/26/2023	Participate in monthly Internal Residential Team call		0.50			0.50	0.00	0.50
7/31/2023	Review and comment on Electric heat characterization survey instrument and landlord interview guide. Review of prior draft SOW and C-Team comments. Comment on multi-year ML for behavior savings		2.00			2.00	0.00	2.00
						0.00	0.00	0.00
	Total Hours	0.00	13.75	0.00	0.00	13.75	0.00	13.75
	Total Amount	\$0.00	\$2,832.50	\$0.00	\$0.00	\$2,832.50	0.00	\$2,832.50

Make Payable to: Jennifer Chiodo
JLC Consulting
52 Bent Creek Road
Hinesburg, VT 05416

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-23.06*
Invoice Date: *July 31, 2023*
OEI Project #: *7525*

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 07/01/23 through 07/31/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	2.75	\$206.00	\$566.50
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$566.50</u>

Make Payable to: Jennifer Chiodo
Services Performed 07/01/23 through 07/31/23

001 - EE Program Planning & Implementation

Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
7/24/23	24-26 Plan Data review		1.25			1.25	0.00	1.25
7/26/2023	RI Plan review		1.50			1.50	0.00	1.50
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
Total Hours		0.00	2.75	0.00	0.00	2.75	0.00	2.75
Total Amount		\$0.00	\$566.50	\$0.00	\$0.00	\$566.50	0.00	\$566.50

Ralph Prah
7001 Stanhope Place, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 41
Invoice Date: August 1, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount
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Services Performed 07/01/23 through 07/31/23

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	8.50	\$206.00	\$1,751.00
LABOR - Travel Hours	0.00	\$103.00	\$0.00

Travel Expenses \$0.00
(See attached travel expense form for details.)

TOTAL DUE **\$1,751.00**

Ralph Prah
Services Performed 07/01/23 through 07/31/23

001 - EE Program Planning & Implementation

Date	Description of Services	001 - EE Program Planning & Implementation			Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
		001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives				
7/6/2023	WFD report; NRNC baseline study; C&I custom gas study		0.75			0.75	0.00	0.00
7/9/2023	WFD report; NRNC study		0.75			0.75	0.00	0.75
7/10/2023	custom gas impact study; NRNC baseline study		0.25			0.25	0.00	0.75
7/12/2023	C&I studies call		0.75			0.75	0.00	0.25
7/17/2023	NRNC baseline study; custom electric impact eval		0.50			0.50	0.00	0.75
7/20/2023	NRNC baseline study; custom electric impact eval		0.25			0.25	0.00	0.50
7/23/2023	ann plan; custom electric impact eval		0.25			0.00	0.00	0.25
7/26/2023	Res studies check-in call; annual plan		0.75			0.25	0.00	0.25
7/27/2023	electric heat market study; C&I electric impact eval		0.75			0.75	0.00	0.75
7/28/2023	electric heat market study; measure life report; C&I custom electric impact eval		2.25			0.75	0.00	0.75
7/29/2023	electric heat market study		0.25			2.25	0.00	2.25
7/30/2023	electric heating study, measure life report		1.00			0.25	0.00	0.25
						1.00	0.00	1.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
Total Hours		0.00	8.50	0.00	0.00	8.50	0.00	8.50
Total Amount		\$0.00	\$1,751.00	\$0.00	\$0.00	\$1,751.00	0.00	\$1,751.00

Rachel Sholly
48 Hudson Street, Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 67
Invoice Date: July 31, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount
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Services Performed 07/01/2023 through 07/31/2023

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	27.00	\$161.00	\$4,347.00
LABOR - Admin Hours	0.00	\$83.00	\$0.00
LABOR - Travel Hours	0.00	\$80.50	\$0.00

Travel Expenses \$0.00
(See attached travel expense form for details.)

TOTAL DUE **\$4,347.00**

Rachel Sholly

Services Performed 07/01/2023 through 07/31/2023

		001 - EE Program Planning & Implementation			004 - Council Sponsored Meetings & Materials						
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	004-01 Meeting Attendance	004-02 Develop Technical Materials	004-03 Other Council Responsibilities	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Sub-Total Admin Hrs.	Total Hours
07/03/23	Updated orientation slides			3.00				3.00	0.00	0.00	3.00
07/05/23	C-team planning re: EE plan & edu activities			0.50				0.50	0.00	0.00	0.50
07/06/23	Check-in w/M. Lynch (Optimal) re: public forum & EWG; Check-in w/J. Galluzzo (Optimal) re: edu info gathering			1.00				1.00	0.00	0.00	1.00
07/07/23	Correspondence re: public forum agenda feedback; Correspondence re: EdComm mtg scheduling			0.75				0.75	0.00	0.00	0.75
07/10/23	EdComm mtg follow-ups; Correspondence re: public forum, contractor CE courses, public awareness RFP & annual report printing; Updated public awareness campaign timeline & RFP, related correspondence			2.50				2.50	0.00	0.00	2.50
07/11/23	Prepared annual report for printing, correspondence w/printer; Call w/K. Verrengia re: CleaResult training courses; Correspondence re: EdComm mtg scheduling			1.25			0.75	2.00	0.00	0.00	2.00
07/12/23	C-team planning re: Council mtg materials; Reviewed contractor training materials from K. Verrengia (CleaResult)			1.25				1.25	0.00	0.00	1.25
07/13/23	Deliverables review mtg w/Advocacy; Updated orientation slides; Mtg w/annual report printer, reviewed proof; Updated RFP slides			2.00			1.00	3.00	0.00	0.00	3.00
07/17/23	Finalized Optimal org chart & orientation slides			0.50				0.50	0.00	0.00	0.50
07/19/23	C-team planning re: Council mtg prep; Reviewed mtg materials; Deliverables review mtg w/Advocacy; Mtg w/annual report printer; Events planning check-in w/URI			3.00			0.25	3.25	0.00	0.00	3.25
07/20/23	EERMC & ExComm mtgs prep & participation			2.25				2.25	0.00	0.00	2.25
07/24/23	Correspondence re: public awareness RFP, public forum			1.00				1.00	0.00	0.00	1.00
07/25/23	Public forum prep, reviewed full agenda, distributed registration info			1.25				1.25	0.00	0.00	1.25
07/26/23	New Councilor orientation w/J. Day (EERMC)			0.25				0.25	0.00	0.00	0.25
07/27/23	Brand/comms check-in w/Advocacy, updated timeline; Reviewed K-12 research notes from J. Galluzzo (Optimal), strategized on new approach			1.50				1.50	0.00	0.00	1.50
07/31/23	Updated RFP contact list, sent RFP to additional venders; Reviewed updated lecture series outline, descriptions, speakers			3.00				3.00	0.00	0.00	3.00
Total Hours		0.00	0.00	25.00	0.00	0.00	2.00	27.00	0.00	0.00	27.00
Total Amount		\$0.00	\$0.00	\$4,025.00	\$0.00	\$0.00	\$322.00	\$4,347.00	\$0.00	\$0.00	\$4,347.00



From **Advocacy Solutions LLC**
 1 Richmond Square
 Suite 200N
 Providence, RI 02906

Invoice For **RI Energy Efficiency Resource Management Council**
 RI Office of Energy Resources
 One Capitol Hill
 Providence, RI 02908

Invoice ID **571**
 Issue Date 10/31/2023
 Due Date 10/31/2023 (upon receipt)

Item Type	Description	Quantity	Unit Price	Amount
Service	Branding and Communications Development - 10/05/2023 - Meeting Attendance / Ben Smith: Advocacy Solutions / EERMC bi-weekly check-in	0.50	\$150.00	\$75.00
Service	Branding and Communications Development - 10/05/2023 - Email Correspondence / Ben Smith: Regarding securing Wordpress admin access	1.00	\$150.00	\$150.00
Service	Branding and Communications Development - 10/17/2023 - Admin / Ben Smith: Internal brainstorm for ideas for EERMC updated website	1.50	\$150.00	\$225.00
Service	Branding and Communications Development - 10/18/2023 - Email Correspondence / Ben Smith: Drafted memo outlining ideas for EERMC updated website	0.75	\$150.00	\$112.50
Service	Branding and Communications Development - 10/19/2023 - Meeting Attendance / Ben Smith: Advocacy Solutions / EERMC bi-weekly check-in	0.50	\$150.00	\$75.00
Service	Branding and Communications Development - 10/19/2023 - Email Correspondence / Ben Smith: Developed deliverables timeline and presentation schedule	0.50	\$150.00	\$75.00
Service	Branding and Communications Development - 10/25/2023 - Design Services / Ben Smith: Related to planning and development around the Council's updated website and landing page.	1.50	\$150.00	\$225.00
Product	Branding and Communications Development - 10/05/2023 - Design Services / Ben Smith: RATE: Design (\$175/Hr) HOURS TO DATE: 32 TOTAL: \$5,600 RATE: Design Management (\$125/Hr) HOURS TO DATE: 8 TOTAL: \$1,000	1.00	\$6,600.00	\$6,600.00

Amount Due \$7,537.50

INVOICE
Federal Tax ID# 03-0351557



Remit checks to:
Optimal Energy, Inc.
PO Box 74008680
Chicago, IL 60674-8680

Remit ACH transfer to:
ABA Routing Number 063100277
Account Number 898052466590
Email ACH/Wire remittance details to RemittanceNotifications@nv5.com

Remit Wire Transfers to:
ABA Routing Number 026009593
Account Number 898052466590
Swift Code INTL. BOFAUS3N

Steven Chybowski
Rhode Island Office of Energy Resources

August 31, 2023
Project No: 863223-0007525.00
Invoice No: 000000350768

Professional Services from August 1, 2023 to August 31, 2023

Phase 001 EE Prg Planning & Implementation Oversig

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	1.00	140.00	140.00	
Johnson, Craig	5.50	193.00	1,061.50	
Ross, Samuel	1.00	206.00	206.00	
Totals	7.50		1,407.50	
Total Labor				1,407.50
		Total this Task		\$1,407.50

Task 02 Implementation Oversight and Plan Develo

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	99.50	140.00	13,930.00	
Johnson, Craig	103.75	193.00	20,023.75	
Ross, Samuel	16.00	206.00	3,296.00	
Totals	219.25		37,249.75	
Total Labor				37,249.75

Consultants

Glenn Reed dba: GDR Consulting	3,347.50		
CORE ENERGY INSIGHTS INC.	1,544.00		
ECOMETRIC CONSULTING, LLC	4,068.50		
Energy Futures Group, Inc.	2,060.00		
RALPH PRAHL	3,399.00		
Total Consultants		14,419.00	14,419.00
		Total this Task	\$51,668.75

Task 03 Education Initiatives

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	1.25	140.00	175.00	
Johnson, Craig	1.00	193.00	193.00	
Ross, Samuel	5.00	206.00	1,030.00	
Totals	7.25		1,398.00	
Total Labor				1,398.00

Consultants

Rachel Sholly			4,427.50	
Total Consultants			4,427.50	4,427.50

Total this Task \$5,825.50

Total this Phase \$58,901.75

Phase 002 System Reliability Procurement

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount	
Ross, Samuel	1.00	206.00	206.00	
Totals	1.00		206.00	
Total Labor				206.00

Total this Task \$206.00

Task 02 Plan Development and Oversight

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	.50	140.00	70.00	
Ross, Samuel	5.25	206.00	1,081.50	
Totals	5.75		1,151.50	
Total Labor				1,151.50

Total this Task \$1,151.50

Total this Phase \$1,357.50

Phase 003 Regulatory Proceedings

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount	
Johnson, Craig	6.50	193.00	1,254.50	
Ross, Samuel	1.25	206.00	257.50	
Totals	7.75		1,512.00	
Total Labor				1,512.00

Total this Task \$1,512.00

Task 02 Develop Technical Materials

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	.50	140.00	70.00	
Johnson, Craig	3.50	193.00	675.50	
Totals	4.00		745.50	
Total Labor				745.50
				Total this Task
				\$745.50
				Total this Phase
				\$2,257.50

Phase 004 Council Sponsored Meetings and Materials

Task 01 Meeting Attendance

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	2.00	140.00	280.00	
Johnson, Craig	2.00	193.00	386.00	
Ross, Samuel	2.25	206.00	463.50	
Totals	6.25		1,129.50	
Total Labor				1,129.50
				Total this Task
				\$1,129.50

Task 02 Develop Technical Materials

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	7.75	140.00	1,085.00	
Johnson, Craig	5.00	193.00	965.00	
Ross, Samuel	2.75	206.00	566.50	
Totals	15.50		2,616.50	
Total Labor				2,616.50
				Total this Task
				\$2,616.50

Task 03 Other Council Responsibilities

Professional Personnel

	Hours	Rate	Amount	
Johnson, Craig	3.75	193.00	723.75	
Ross, Samuel	8.25	206.00	1,699.50	
Totals	12.00		2,423.25	
Total Labor				2,423.25
				Total this Task
				\$2,423.25
				Total this Phase
				\$6,169.25

Phase 005 Research, Analysis, and Other Council Su

Professional Personnel

	Hours	Rate	Amount	
Johnson, Craig	1.25	193.00	241.25	
Ross, Samuel	4.00	206.00	824.00	
Totals	5.25		1,065.25	
Total Labor				1,065.25

Total this Phase \$1,065.25

Phase 006 Administrative

Professional Personnel

	Hours	Rate	Amount	
Johnson, Craig	1.25	80.00	100.00	
Totals	1.25		100.00	
Total Labor				100.00

Consultants

Rachel Sholly			103.75	
Total Consultants			103.75	103.75

Total this Phase \$203.75

Phase 007 EERMC Intern

Additional Fees

Monthly Intern Fee (Aug 2023)			3,750.00	
Total Additional Fees			3,750.00	3,750.00

Total this Phase \$3,750.00

Billing Limits

	Current	Prior	To-Date	
Total Billings	73,705.00	367,863.99	441,568.99	
Limit			717,025.00	
Remaining			275,456.01	

Total this Invoice \$73,705.00

Billings To Date

	Current	Prior	Total
Labor	51,004.75	251,983.00	302,987.75
Consultant	18,950.25	101,511.00	120,461.25
Expense	0.00	3,119.99	3,119.99
Add-on	3,750.00	11,250.00	15,000.00
Totals	73,705.00	367,863.99	441,568.99

Billing Backup

Thursday, September 14, 2023

NV5, Inc. Invoice 000000350768 Dated 8/31/2023 7:54:03 AM

Phase 001 EE Prg Planning & Implementation Oversight

Task 01 Council Representation

Professional Personnel

		Hours	Rate	Amount
Caesar, Adrian	8/24/2023	1.00	140.00	140.00
August EE TWG - AMF and EE planning, EE Plan updates.				
Johnson, Craig	8/1/2023	2.25	193.00	434.25
Bi-weekly check-in w/ RIE and OER, associated meeting prep and debrief with internal team.				
Johnson, Craig	8/8/2023	.25	193.00	48.25
Check-in meeting with OER				
Johnson, Craig	8/15/2023	.50	193.00	96.50
Check-in meeting with RIE/OER.				
Johnson, Craig	8/24/2023	1.25	193.00	241.25
Represent Council at EE TWG meeting				
Johnson, Craig	8/29/2023	1.25	193.00	241.25
Bi-weekly check-in call w/ RIE and OER. Meeting prep.				
Ross, Samuel	8/24/2023	1.00	206.00	206.00
TWG attendance				
Totals		7.50		1,407.50
Total Labor				1,407.50
Total this Task				\$1,407.50

Task 02 Implementation Oversight and Plan Develo

Professional Personnel

		Hours	Rate	Amount
Caesar, Adrian	8/6/2023	4.50	140.00	630.00
EM&V study review/comments - RI Electric heat market characterization study survey guides, Measure life study draft report and recommended measure life file, RICE and RICG 2021 custom electric and gas impact evaluation site reports, RICE 2022 sampling plan memo; RI building energy codes follow ups and coordination; RI Energy mid-year updates filing review; RI Energy Q2 euqity update				
Caesar, Adrian	8/7/2023	.75	140.00	105.00
Measure Life Review study follow ups and measure source/measure life update workbook QA				
Caesar, Adrian	8/8/2023	1.75	140.00	245.00
2024 EE Annual Plan Review - C-Team working sessions/coordination, main text, narrative, and attachments review; Preliminary Q2 program results analysis				
Caesar, Adrian	8/9/2023	7.50	140.00	1,050.00
C&I EM&V call prep/mtg; 2024 EE Annual Plan Review - main text, Attachment 2 C&I programs; Preliminary Q2 program results analysis; 2024 EE Plan program-level quantitative analysis; Q2 RI implementation and oversight tracker review - 2023 plan commitments				
Caesar, Adrian	8/10/2023	8.50	140.00	1,190.00
C&I Sector team mtg./prep and follow ups; 2024 EE Annual Plan Review - main text, Attachment 2 C&I programs, Attachment 3 EM&V plan; Preliminary Q2 program results analysis; 2024 EE Plan program-level quantitative analysis; 2023 Q2 report review				

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000350768
Caesar, Adrian		8/11/2023	6.00	140.00	840.00	
	2024 EE Annual Plan Review - main text, Attachment 2 C&I programs, Attachment 3 EM&V plan, Electric and Gas tables and BCR models; Preliminary Q2 program results analysis; 2024 EE Plan program-level quantitative analysis; 2023 Q2 report review					
Caesar, Adrian		8/14/2023	2.50	140.00	350.00	
	2024 EE Plan review - Main text and attachments 2, 3, 5, 6, 8; 2024 EE plan first draft electric and gas BCR model analysis - measure deltas from 3YP, program -level comps, evaluation impact factors					
Caesar, Adrian		8/15/2023	7.25	140.00	1,015.00	
	2024 EE Plan review - Main text and attachments 3, 5, 6, 8; 2024 EE plan first draft electric and gas BCR model analysis - measure deltas from 3YP, program -level comps, evaluation impact factors, 3YP and AP measure mapping, savings and investment comps - lighting/gas equipment; 2024 Q2 report and RIE equity update/EWG meeting notes review; RI Custom Electric PY21 final site report review; RIE Responses to Information requests					
Caesar, Adrian		8/16/2023	3.50	140.00	490.00	
	2024 EE Plan review - Main text and attachments 3, 5, 6, 8; 2024 EE plan first draft electric and gas BCR model analysis - measure deltas from 3YP, program -level comps, evaluation impact factors, 3YP and AP measure mapping, savings and investment comps - lighting/gas equipment; 2024 Q2 report review.					
Caesar, Adrian		8/17/2023	4.00	140.00	560.00	
	2024 EE Plan review - Main text and attachments 5, 6, 8; 2024 EE plan first draft electric and gas BCR model analysis - measure deltas from 3YP, program -level comps, evaluation impact factors, 3YP and AP measure mapping, savings and investment comps - lighting/gas equipment; 2024-2026 SRP plan narrative review; final Measure Life study report and one-pager review					
Caesar, Adrian		8/18/2023	3.75	140.00	525.00	
	2024 EE Plan review - Main text and attachments 2, 5, 6, 8; EE Plan recommendations for specific equity/program achievement metrics and goals; 2024 EE plan first draft electric and gas BCR model analysis - measure deltas from 3YP, program -level comps, evaluation impact factors, savings and investment comps - lighting/gas equipment trend analysis					
Caesar, Adrian		8/21/2023	5.00	140.00	700.00	
	July C&I and Res/IES program data review and data report development; C&I data report updates - program level data visualizations, top saving measure charts; 2024 EE Plan review - RI TRM Database measure inputs and mapping updates; EM&V study review/coordination - SBS final process evaluation report, EWSF Weatherization impact evaluation updated draft report; Monthly Res EM&V call agenda development; EM&V study tracker updates					
Caesar, Adrian		8/22/2023	4.50	140.00	630.00	
	2024 EE Plan review - RI TRM Database measure inputs and mapping updates; EM&V study review/coordination - EWSF Weatherization impact evaluation updated draft report; EM&V study tracker review, 2024 BCR model review and QA/QC - year-to-year plan/actual deltas, measure cost analysis, impact factors review and comps to updated TRM DB					
Caesar, Adrian		8/23/2023	7.50	140.00	1,050.00	

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000350768
						Res/IES EM&V meeting; 2024 EE Plan review - RI TRM Database measure inputs and mapping updates; EM&V study review/coordination - Electric heat market characterization study, updated RICE custom electric site reports for final RRs, SBS process eval final report and one-pager, EWSF Weatherization impact evaluation updated draft report; EM&V study tracker review; 2024 EE Plan narrative C-Team comments consolidation and final review - main text, attachment 2, attachment 3; 2024 BCR model review and QA/QC - year-to-year plan/actual deltas, measure cost analysis, impact factors review and comps to updated TRM DB
Caesar, Adrian		8/24/2023	5.50	140.00		770.00
						EM&V Check-ins - C&I Net to Gross study, C&I kitchen equipment ISP study; C&I FRSO/NTG study results review; 2024 EE Plan narrative C-Team comments consolidation and final review - main text, attachment 2, attachment 3; RICG PY2021 impact evaluation draft report review
Caesar, Adrian		8/25/2023	4.25	140.00		595.00
						C&I FRSO/NTG study results review; RICG PY2021 impact evaluation draft report review; RI Commercial kitchen equipment ISP follow ups; 2024 BCR model review and QA/QC - year-to-year plan/actual deltas, measure cost analysis, impact factors review and comps to updated TRM DB; EM&V process evaluation writeup
Caesar, Adrian		8/28/2023	6.25	140.00		875.00
						2024 EE Plan quantitative analysis - BCR model review, year-to-year plan/actual/MPS comps, BCR measure input review/QA and comps to TRM; EM&V Study review - RICG 2021 custom impact evaluation draft report, EWSF weatherization impact evaluation draft report, updated C&I FRSO study results
Caesar, Adrian		8/29/2023	6.00	140.00		840.00
						2024 EE Plan quantitative analysis - BCR model review, year-to-year plan/actual/MPS comps, BCR measure input review/QA and comps to TRM; updated TRM database quant analysis and input review; EM&V process memo development and study tracker updates
Caesar, Adrian		8/30/2023	7.00	140.00		980.00
						2024 EE Plan quantitative analysis - BCR model review, year-to-year plan/actual/MPS comps, BCR measure input review/QA and comps to TRM, BCR model impact factors and NEI assumptions, NTG application to EE measures/costs; updated TRM database quant analysis and input review; updated C&I NTG study results file review; EM&V study review/coordination - PY2021 RICG custom gas impact evaluation RR results and steam trap treatment, EWSF impact evaluation results and savings/consumption assumptions
Caesar, Adrian		8/31/2023	3.50	140.00		490.00
						EM&V study results review - RICG cust gas 2021 impact evaluation, Steam trap vs. non steam trap treatment and report recommendations; August EWG meeting/prep; EWG recommendations and actions matrix review
Johnson, Craig		8/1/2023	2.75	193.00		530.75
						3YP Review - review and respond to question from RIE re: data used for 3YP comparison of Income Eligible Wx chart in presentation to Council. 2024 Plan Review - prep analysis task for Jordan on comparisons of cost categories, working session to review task. Res Sector Team - Work on coordination for August res meeting.
Johnson, Craig		8/2/2023	2.50	193.00		482.50
						2024 Plan - Discussion with Sam re: strategies for pushing for more weatherization. Equity Working Group support - review draft agenda for EWG meeting, coordinate attendance and material development. EM&V - Review and provide comments on RI Measure Life Study Draft. Sector Teams - Email sector team attendees reminder to fill out poll for scheduling next meeting, prep agenda topics.

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000350768
Johnson, Craig		8/3/2023	1.00	193.00	193.00	
		Plan Review - Check-in meeting and working session with Jordan to review comparisons of cost categories.				
Johnson, Craig		8/8/2023	7.00	193.00	1,351.00	
		EM&V - E-mails with internal team re: RI Measure Life study, including strategy for whether update is needed for HERs programs. Equity Working Group - Check-in w/ Margie, review materials, coordinate attendance, and follow-up on question from Acadia Center. 2024 Plan Review - First run through review of first draft 2024 Plan residential attachment.				
Johnson, Craig		8/9/2023	6.75	193.00	1,302.75	
		Res Sector Team Work - Finish drafting and distribute agenda for August residential sector team meeting, coordination w/ RIE re: same. 2024 Plan - Coordination with Adrian on BC Model review. Continue review of Residential Attachment, including second read through with an eye towards responsiveness to Council priorities.				
Johnson, Craig		8/10/2023	9.00	193.00	1,737.00	
		2024 Plan Review - Continue review of residential attachment and begin pulling out key themes for feedback to include in presentation to Council. Also began reviewing main text with an eye to responsiveness to Council priorities. Began review of compliance with LCP standards. BC Model Analysis - Gas Res HVAC measures analysis.				
Johnson, Craig		8/11/2023	5.25	193.00	1,013.25	
		Continue review of plan narrative, including main text for consistency with Council priorities and LCP standards. Res Sector Team - Review and analysis on Q2 data to inform Council material.				
Johnson, Craig		8/14/2023	5.75	193.00	1,109.75	
		2024 Plan Review - Prep analysis task for Jordan, check-in meeting w/ Jordan to discuss plan review. Work on reviewing plan with eye towards Council priorities. Res Sector Team - Lead residential sector team call, meeting prep including review of materials and prep questions.				
Johnson, Craig		8/15/2023	3.75	193.00	723.75	
		2024 Plan Review - discuss analysis of drivers behind changes from 3YP and annual plan with team. Read and review Main Text.				
Johnson, Craig		8/16/2023	7.75	193.00	1,495.75	
		2024 Plan Review - Analysis on key drivers of change between 2024 in 3YP and 2024 Plan. Set up analysis to compare key measure metrics for each residential and income eligible program in 2024 plan compared to 2024 in 3YP draft, 2023 plan, and 2022 actuals.				
Johnson, Craig		8/17/2023	5.25	193.00	1,013.25	
		2024 Plan Review - Set up investigation of incentive budgets between BC Model measures and cost tables. Investigate discrepancies. Review Q2 and 2024 Plan data referenced in presentations to Council to inform talking points.				
Johnson, Craig		8/18/2023	2.00	193.00	386.00	
		2024 Plan Review - Continue review of key drivers of change between 2024 in 3YP and 2024 Plan for residential and income eligible electric and gas programs. Working session with Sam and Adrian to discuss next steps and outcomes from Council meeting.				
Johnson, Craig		8/21/2023	6.25	193.00	1,206.25	
		Plan Review - Research on induction cooktops to help RIE with characterizing measure for inclusion in Plan. Initial review of comments on Residential and Main Text from Margie, Glenn, and Richard. Sector Team work - review meeting notes from August sector team meeting. Initial review of July Residential data report.				
Johnson, Craig		8/22/2023	5.50	193.00	1,061.50	

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000350768
						Plan Review - finish initial research on induction cooktops and get back to Toby with thoughts regarding measure characterization and possibility of inclusion in plan. Check-in with Sam and Adrian re: ongoing plan review, including coordination of reviewing and finalizing narrative, BC Model, TRM, and Rate and Bill Impact Models. Coordination with res sector team on narrative review, including continued review of comments from Margie, Glenn, and Richard on Residential and Main Text attachments. Sector Team work - finish review of meeting notes from August sector team meeting and update Implementation and Oversight tracker with meeting follow-ups. Continue review and distribution of July data report. Initial brainstorm of agenda items and materials needed for September sector team meeting. EM&V - Initial review of EW SF Impact Evaluation, correspondence with team re: EM&V review strategy and expectations, and approach for determining whether or not we recommend results adopted for 2024 plan.
Johnson, Craig		8/23/2023	8.75	193.00	1,688.75	
						Plan Review - review and provide comments on Demos, Pilots, and Assessments attachment. Review and provide final set of comments on Main Text. Review comments from res team on Residential attachment, consolidate and prepare final comments from res attachment. Review and provide feedback on C&I attachment. Review and provide final comments on EM&V attachment.
Johnson, Craig		8/24/2023	7.75	193.00	1,495.75	
						Plan Review - Final review and consolidation of res team comments on Residential attachment. Final review and packaging of comments on main text, residential and C&I attachments, EM&V attachment, RI Cost Test Attachment, and PDA attachment; working session with Sam and Adrian re: same. Continue analytical review of BC Models, including review of notable measure changes for residential and income eligible programs. Analysis of incentive program costs in Costs Table compared to Calcs sheet.
Johnson, Craig		8/29/2023	6.75	193.00	1,302.75	
						2024 Plan Review - BC Model review - including QA review for residential and income eligible program measure inputs. Comprehensive review of similar measures across programs, reviewing measure inputs such as savings, cost, NTG, and NEI application. Completed this review for all income eligible programs in each of the electric and gas BC Models, and began review on residential programs. Review incentive coverage and note any unexplained discrepancies.
Johnson, Craig		8/30/2023	8.75	193.00	1,688.75	
						2024 Plan Review - Continue BC Model review - including QA review for residential and income eligible program measure inputs. Comprehensive review of similar measures across programs, reviewing measure inputs such as savings, cost, NTG, and NEI application. Continued and completed this review for all residential programs in each of the electric and gas BC Models. Flag measures, especially gas heating and hot water equipment with BCR <1, where significant incentives offered. Package up quantitative questions for delivery to RIE team. Discussions w/ Adrian re: same.
Johnson, Craig		8/31/2023	1.25	193.00	241.25	
						EM&V - Review responses to questions on EWSF Impact Evaluation Draft Report. Equity - review team notes on outcomes from Equity Working Group Meeting.
Ross, Samuel		8/4/2023	.75	206.00	154.50	
						check in re: various tasks, incl. Sue email Q, plan review next steps and timing of materials
Ross, Samuel		8/9/2023	1.50	206.00	309.00	
						begin to review main text annual plan
Ross, Samuel		8/10/2023	2.50	206.00	515.00	

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		cont. review of main text annual plan				
Ross, Samuel		8/16/2023	.25	206.00	51.50	
		coord cont. review of EE plans				
Ross, Samuel		8/18/2023	.75	206.00	154.50	
		Council meeting debrief				
Ross, Samuel		8/22/2023	1.50	206.00	309.00	
		EE plan review check in, cont. 2024 plan review.				
Ross, Samuel		8/23/2023	5.00	206.00	1,030.00	
		Review plan comments with Emily from Acadia Center; cont. Annual plan review to finalize comments on main text				
Ross, Samuel		8/24/2023	2.75	206.00	566.50	
		Annual plan attachment review, comment finalization				
Ross, Samuel		8/29/2023	.50	206.00	103.00	
		check in on quant review progress, TRM and EWG progress.				
Ross, Samuel		8/30/2023	.50	206.00	103.00	
		review top flags from Annual Plan quant review				
		Totals	219.25		37,249.75	
		Total Labor				37,249.75
					Total this Task	\$51,668.75

Task	03	Education Initiatives				
Professional Personnel						
			Hours	Rate	Amount	
Caesar, Adrian		8/7/2023	.25	140.00	35.00	
		URI PIER lecture coordination				
Caesar, Adrian		8/30/2023	1.00	140.00	140.00	
		EERMC public education and PIER lecture planning; biweekly EERMC/URI check in;				
Johnson, Craig		8/8/2023	.25	193.00	48.25	
		Correspond with team re: updated Council logo and whether official name needs to be included.				
Johnson, Craig		8/9/2023	.50	193.00	96.50	
		Check-in and working session with Sam and Rachel on Education RFP, Advocacy Solutions work, and Education Committee agenda.				
Johnson, Craig		8/23/2023	.25	193.00	48.25	
		Check in with Rachel on education items, including updated distribution of RFP for climate and ee awareness campaign and prep for check-in meeting with Advocacy Solutions tomorrow.				
Ross, Samuel		8/2/2023	1.00	206.00	206.00	
		advocacy solutions check in				
Ross, Samuel		8/3/2023	.75	206.00	154.50	
		prep for, follow up call with advocacy solutions on workplan, deliverables in coming weeks				
Ross, Samuel		8/9/2023	.50	206.00	103.00	
		conv. with Peter and Rachel re: advocacy solutions progress and next steps				
Ross, Samuel		8/10/2023	1.00	206.00	206.00	
		check in with Ben from advocacy; corresp re; outcomes, coord updates for steve and rest of team				
Ross, Samuel		8/11/2023	.75	206.00	154.50	
		discussion with Harry et al. re: advocacy updates, meeting Mon. and follow ups				

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Ross, Samuel		8/30/2023	1.00	206.00	206.00
	branding mtg w/Advocacy Solutions				
		Totals	7.25		1,398.00
		Total Labor			1,398.00
				Total this Task	\$5,825.50
				Total this Phase	\$58,901.75

Phase 002 System Reliability Procurement

Task 01 Council Representation

Professional Personnel

			Hours	Rate	Amount
Ross, Samuel		8/16/2023	1.00	206.00	206.00
	SRP TWG attendance				
		Totals	1.00		206.00
		Total Labor			206.00
				Total this Task	\$206.00

Task 02 Plan Development and Oversight

Professional Personnel

			Hours	Rate	Amount
Caesar, Adrian		8/16/2023	.50	140.00	70.00
	2024-2026 SRP plan narrative review				
Ross, Samuel		8/15/2023	2.00	206.00	412.00
	initial review of SRP 3YP draft				
Ross, Samuel		8/16/2023	.25	206.00	51.50
	review of SRP plans				
Ross, Samuel		8/22/2023	3.00	206.00	618.00
	final review, finalize comments on SRP 3YP.				
		Totals	5.75		1,151.50
		Total Labor			1,151.50
				Total this Task	\$1,151.50
				Total this Phase	\$1,357.50

Phase 003 Regulatory Proceedings

Task 01 Council Representation

Professional Personnel

			Hours	Rate	Amount
Johnson, Craig		8/17/2023	2.00	193.00	386.00
	PUC Workshop on Funding Coordination - attend meeting, associated meeting prep.				
Johnson, Craig		8/31/2023	4.50	193.00	868.50

Project	863223-0007525.00	Rhode Island EERMC - 2023	Invoice	000000350768
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Attendance at Future of Gas Stakeholder Committee meeting.				
Ross, Samuel	8/31/2023	1.25	206.00	257.50
listen in for part of Future of Gas docket proceeding, incl. networked geothermal presentation; confirm coverage and takeaways for balance of mtg w/CJohnson				
Totals		7.75		1,512.00
Total Labor				1,512.00
Total this Task				\$1,512.00

Task	02	Develop Technical Materials		
Professional Personnel				
		Hours	Rate	Amount
Caesar, Adrian	8/16/2023	.50	140.00	70.00
RIE response to informal Div IR - heat pumps/Wx/gas heating				
Johnson, Craig	8/1/2023	.50	193.00	96.50
Final review and coordination with Council legal to prepare filing response on PUC Data Requests in Targets Docket.				
Johnson, Craig	8/10/2023	.75	193.00	144.75
Review RIE responses to PUC post-filing DR 4 and Mid-Year Report filing.				
Johnson, Craig	8/15/2023	.25	193.00	48.25
First Draft SRP 3YP - Discuss review tasks with internal team.				
Johnson, Craig	8/31/2023	2.00	193.00	386.00
Prep for Future of Gas Meeting - review meeting notes from previous meetings, review previous meeting materials, review stakeholder comments.				
Totals		4.00		745.50
Total Labor				745.50
Total this Task				\$745.50
Total this Phase				\$2,257.50

Phase	004	Council Sponsored Meetings and Materials		
Task	01	Meeting Attendance		
Professional Personnel				
		Hours	Rate	Amount
Caesar, Adrian	8/17/2023	2.00	140.00	280.00
August EERMC Meeting				
Johnson, Craig	8/17/2023	2.00	193.00	386.00
Attend and present technical materials at August Council meeting.				
Ross, Samuel	8/17/2023	2.25	206.00	463.50
attend, debrief from EERMC mtg				
Totals		6.25		1,129.50
Total Labor				1,129.50
Total this Task				\$1,129.50

Task	02	Develop Technical Materials		
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Professional Personnel

		Hours	Rate	Amount
Caesar, Adrian	8/8/2023	.50	140.00	70.00
August EERMC Mtg. materials development - 2024 EE Annual Plan presentation, preliminary Q2 program results presentation				
Caesar, Adrian	8/10/2023	2.25	140.00	315.00
August EERMC Mtg. materials development - 2024 EE Annual Plan presentation, preliminary Q2 program results presentation				
Caesar, Adrian	8/11/2023	2.00	140.00	280.00
August EERMC Mtg. materials development - 2024 EE Annual Plan presentation, preliminary Q2 program results presentation				
Caesar, Adrian	8/15/2023	.25	140.00	35.00
August EERMC mtg. prep/presentation coordination				
Caesar, Adrian	8/16/2023	2.00	140.00	280.00
August EERMC mtg. prep; 2024 EE Plan appendices development - program-level comps tables and charts, EMV/C&I sector/ADM content				
Caesar, Adrian	8/17/2023	.50	140.00	70.00
August EERMC mtg. prep				
Caesar, Adrian	8/18/2023	.25	140.00	35.00
August EERMC mtg. debrief/follow-up discussion				
Johnson, Craig	8/2/2023	.25	193.00	48.25
August Council meeting - discuss likely agenda and C-Team materials with internal team.				
Johnson, Craig	8/8/2023	.75	193.00	144.75
August Materials - Working session with team to discuss meeting material development. Coordinate with RIE on presentation materials. Review draft slides from Jordan on Q2 Program Results, provide feedback.				
Johnson, Craig	8/10/2023	1.25	193.00	241.25
August Council Materials - Work on development of 2024 First Draft Plan presentation, focus on outline and core topics to cover. Working session with Jordan and Adrian to review portfolio update slides.				
Johnson, Craig	8/11/2023	2.75	193.00	530.75
August Council materials - Continue and finish work on 2024 First Draft Plan and 2023 Q2 Report slide decks. Working sessions w/ Adrian and Sam re: same. Discussion with Sam and Steve re: reallocation of time on meeting agenda.				
Ross, Samuel	8/10/2023	.75	206.00	154.50
coord council materials dev for end of week, discuss updated agenda due to advocacy change				
Ross, Samuel	8/11/2023	2.00	206.00	412.00
coordinate path to finalization, edit plan review deck, working session with team to finalize				
Totals		15.50		2,616.50
Total Labor				2,616.50
Total this Task				\$2,616.50

Task 03 Other Council Responsibilities

		Hours	Rate	Amount
Johnson, Craig	8/1/2023	.25	193.00	48.25
Check-in meeting with OER on EE Implementation RFP				
Johnson, Craig	8/10/2023	1.00	193.00	193.00

Project	863223-0007525.00	Rhode Island EERMC - 2023		Invoice	000000350768
		Review EE Implementation RFP v1.5, working session with Sam to discuss same, and prep for check-in call with OER.			
Johnson, Craig		8/11/2023	1.00	193.00	193.00
		Working session with Sam and Steve on EE Implementation RFP.			
Johnson, Craig		8/18/2023	1.50	193.00	289.50
		Working session with Sam and Steve on EE Implementation RFP.			
Ross, Samuel		8/10/2023	3.00	206.00	618.00
		full read through of redlined EE RFP, add'tl comments			
Ross, Samuel		8/11/2023	1.50	206.00	309.00
		prep for, meeting with Steve re: EE RFP			
Ross, Samuel		8/18/2023	1.50	206.00	309.00
		EE RFP working session with Steve			
Ross, Samuel		8/25/2023	2.25	206.00	463.50
		morning check in; prep for and attend mtg with Steve re: EE Imp RFP			
		Totals	12.00		2,423.25
		Total Labor			2,423.25
				Total this Task	\$2,423.25
				Total this Phase	\$6,169.25

Phase	005	Research, Analysis, and Other Council Su			
Professional Personnel					
			Hours	Rate	Amount
Johnson, Craig		8/1/2023	.25	193.00	48.25
		AESC - coordinate RI team coverage for kickoff call.			
Johnson, Craig		8/3/2023	.75	193.00	144.75
		Check-in meeting with Jordan on Newsletter, including review of tracker for items to include in future iterations, and discussions around next steps.			
Johnson, Craig		8/4/2023	.25	193.00	48.25
		Review and respond to Councilor AnderBois question regarding eligibility criteria for small business program, e-mails w/ Sam re: same.			
Ross, Samuel		8/16/2023	2.00	206.00	412.00
		prep for, attend EERMC prep mtg with Councilors Case and Oakley			
Ross, Samuel		8/17/2023	2.00	206.00	412.00
		cont. prep meeting with Councilor Oakley			
		Totals	5.25		1,065.25
		Total Labor			1,065.25
				Total this Phase	\$1,065.25

Phase	006	Administrative			
Professional Personnel					
			Hours	Rate	Amount
Johnson, Craig		8/13/2023	.75	80.00	60.00
		URI Energy Fellow Oversight - Complete mid-term assessment for URI.			
Johnson, Craig		8/30/2023	.50	80.00	40.00
		Check-in call with URI Energy Fellows Program lead to discuss Enegy Fellow work to date and gauge interest for supporting another fellow next year.			
		Totals	1.25		100.00
		Total Labor			100.00

Total this Phase **\$203.75**

Total this Project **\$69,955.00**

Total this Report **\$69,955.00**

Margie Lynch/Core Energy Insights, Inc.
4445 E. Hoback River Road, Jackson, WY 83001

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 8-2023*
Invoice Date: *August 31, 2023*
OEI Project #: *7525*

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 08/01/23 through 08/31/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	8.00	\$193.00	\$1,544.00
LABOR - Travel Hours	0.00	\$96.50	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$1,544.00</u>

Margie Lynch/Core Energy Insights, Inc.
Services Performed 08/01/23 through 08/31/23

		001 - EE Program Planning & Implementation						
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
8/8/2023	Prepared for, participated in, and followed up on Equity Working Group meeting		2.25			0.00	0.00	0.00
8/10/2023	Prepared for Res Sector Team meeting; reviewed and edited EWG meeting notes and follow ups		1.00			2.25	0.00	2.25
8/14/2023	Participated in Res Sector Team meeting		1.00			1.00	0.00	1.00
8/22/2023	Reviewed 8.8 Equity Working Group meeting notes; reviewed and commented on draft 2024 plan		1.50			1.00	0.00	1.00
8/31/2023	Prepared for, participated in, and followed up on Equity Working Group meeting		2.25			1.50	0.00	1.50
						2.25	0.00	2.25
						0.00	0.00	0.00
	Total Hours	0.00	8.00	0.00	0.00	8.00	0.00	8.00
	Total Amount	\$0.00	\$1,544.00	\$0.00	\$0.00	\$1,544.00	0.00	\$1,544.00



EcoMetric Consulting, LLC
41 Leopard Road, Suite 104
Paoli, PA 19301
610.400.8600
admin@ecometricconsulting.com

INVOICE

BILLED TO

Sam Ross
Optimal Energy - NV5
10600 Route 116, Suite 3
Hinesburg, VT 05461

TOTAL DUE

\$4,068.50

Project Name	RI EERMC Consultant	Invoice Date	09/06/2023
Project #	7525	Due Date	10/06/2023
Invoice #	1029-P8-23	Payment Terms	Net 30
Billing Period	07/29/2023 - 09/01/2023		

Task Number	Description	Amount
001-02	Implementation Oversight & Plan Development	\$4,068.50

Subtotal \$4,068.50

Invoice Total \$4,068.50

Invoice Number 1029-P8-23
 Period 07/29/2023 - 09/01/2023

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EERMC Consultant	Implementation Oversight & Plan D	Dr Salil Gogte	Partner	2023-08	0	\$ 220.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Dr Michael Frischmann	Partner	2023-08	0	\$ 220.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Dr Michael Honeychuck	Managing Consultant	2023-08	15.75	\$ 206.00	\$ 3,244.50
RI EERMC Consultant	Implementation Oversight & Plan D	Dr Bitul Sinha	Managing Consultant	2023-08	0	\$ 206.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Dr Cory Read	Data Scientist	2023-08	0	\$ 206.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Dr Jake Fuller	Managing Consultant	2023-08	0	\$ 206.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Dr Mary George	Sr Engineer	2023-08	0	\$ 166.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Dr Kyle McKenna	Managing Consultant	2023-08	4	\$ 206.00	\$ 824.00
Total					19.75		\$ 4,068.50
Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EERMC Consultant		0 Salil Gogte	Partner	2023-08	0	\$ 220.00	\$ -
RI EERMC Consultant		0 Michael Frischmann	Partner	2023-08	0	\$ 220.00	\$ -
RI EERMC Consultant		0 Michael Honeychuck	Managing Consultant	2023-08	0	\$ 206.00	\$ -
RI EERMC Consultant		0 Bitul Sinha	Managing Consultant	2023-08	0	\$ 206.00	\$ -
RI EERMC Consultant		0		2023-08	0		\$ -
Total					-		\$ -

fname	local_date	hours	task	notes
				Draft 2024 EE plan review & comments
Kyle Mckenna	8/22/2023	1	Implementation Oversight & Plan Development	Emails
				Draft 2024 EE plan review & comments
Kyle Mckenna	8/23/2023	3	Implementation Oversight & Plan Development	Emails
				Invoice & discussions
Michael Honeychuck	8/2/2023	2	Implementation Oversight & Plan Development	Custom electric site reports review
Michael Honeychuck	8/9/2023	0.75	Implementation Oversight & Plan Development	Monthly C&I call with RI Energy & C-Team
Michael Honeychuck	8/11/2023	1	Implementation Oversight & Plan Development	Custom electric project report reviews
				Custom electric evaluation report reviews
Michael Honeychuck	8/17/2023	2	Implementation Oversight & Plan Development	Emails
				Custom electric evaluation report reviews
Michael Honeychuck	8/18/2023	2	Implementation Oversight & Plan Development	Emails
				Draft 2024 EE plan review & comments
Michael Honeychuck	8/21/2023	1	Implementation Oversight & Plan Development	Emails
				Draft 2024 EE plan review & comments
Michael Honeychuck	8/22/2023	2	Implementation Oversight & Plan Development	Emails
				Monthly residential call with RI Energy & C-Team
				Draft 2024 EE plan review & comments
Michael Honeychuck	8/23/2023	4	Implementation Oversight & Plan Development	Emails
Michael Honeychuck	8/24/2023	1	Implementation Oversight & Plan Development	FRSO discussion with Guidehouse & TetraTech

Energy Futures Group, Inc.
PO Box 587
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 5935
Invoice Date: August 31, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 08/01/2023 through 08/31/2023			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	10.00	\$206.00	\$2,060.00
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$2,060.00</u>

Energy Futures Group, Inc.

Services Performed 08/01/2023 through 08/31/2023

		001 - EE Program Planning & Implementation						
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
8/3/2023	Res sector meeting.		1.00			0.00	0.00	0.00
8/10/2023	Attend 2nd half of C&I sector meeting		0.50			1.00	0.00	1.00
8/11/2023	Meeting prep		0.50			0.50	0.00	0.50
8/14/2023	Prep for Plan call, then call with RIE. Wx barriers information		1.50			0.50	0.00	0.50
8/18/2023	Review RI 2024 Plan and provide edits and comments		3.50			1.50	0.00	1.50
8/22/2023	Review Plan comments from Glenn and Margie		0.50			3.50	0.00	3.50
8/23/2023	Review RIE 2024 C&I plan and provide comments		2.00			0.50	0.00	0.50
8/23/2023	Glenn re. 2024 Plan		0.50			2.00	0.00	2.00
						0.50	0.00	0.50
						0.00	0.00	0.00
	Total Hours	0.00	10.00	0.00	0.00	10.00	0.00	10.00
	Total Amount	\$0.00	\$2,060.00	\$0.00	\$0.00	\$2,060.00	0.00	\$2,060.00

GDR Consulting
576 Rutland St
Carlisle MA 01741

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: **8R**
Invoice Date: *August 31, 2023*
OEI Project #: **7525**

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 08/01/23 through 08/31/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	16.25	\$206.00	\$3,347.50
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$3,347.50</u>

GDR Consulting

Services Performed 08/01/23 through 08/31/23

		001 - EE Program Planning & Implementation					
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
					0.00	0.00	0.00
8/1/2023	Complete review of Electric customer survey instrument and landlord interview guide		1.25		1.25	0.00	1.25
8/2/2023	Review and comment on draft ML study		1.25		1.25	0.00	1.25
8/9/2023	Review and comment on Wx barriers data		0.25		0.25	0.00	0.25
8/10/2023	Response to inquiry from C. Johnson on MA and RI HVAC program requirements		0.75		0.75	0.00	0.75
8/14/2023	Participate in monthly RI Sector Team call		1.00		1.00	0.00	1.00
8/21/2023	Review and comment on EM&V and on Pilots and Demonstrations 2024 Plan attachments; provide summary email comments		1.50		1.50	0.00	1.50
8/21/2023	Review, comment and provide summary email comments of Residential attachment to 2024 Plan		2.25		2.25	0.00	2.25
8/22/2023	Review and comment on EWSF impact study		1.50		1.50	0.00	1.50
8/22/2023	Review and comment on 2024 Plan Main text, review Craig's responses to my Residential review summary comments		1.75		1.75	0.00	1.75
8/22/2023	Follow up responses to Craig's on Residential Plan attachment review summary comments; analysis of ENERGY STAR unit shipment data and RIE Products offers, and research on room HPs		1.00		1.00	0.00	1.00
8/23/2023	Participate in monthly RI EM&V call and follow up call w/R. Faesy of code support activities		1.50		1.50	0.00	1.50
8/24/2023	Review of R. Prahli's comments on draft EWSF impact study, follow up on electric heat base usage		0.50		0.50	0.00	0.50
8/26/2023	Complete review of draft EWSF impact study and summary email comments		1.25		1.25	0.00	1.25
8/30/2023	Review of RIE's responses to our EWSF comments and reply re: electric heat base usage estimate		0.50		0.50	0.00	0.50
					0.00	0.00	0.00
					0.00	0.00	0.00
	Total Hours	0.00	16.25	0.00	16.25	0.00	16.25
	Total Amount	\$0.00	\$3,347.50	\$0.00	\$3,347.50	0.00	\$3,347.50

Ralph Prahl
7001 Stanhope Place, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 42
Invoice Date: August 31, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 08/01/23 through 08/31/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	16.50	\$206.00	\$3,399.00
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$3,399.00</u>

Ralph Prah

Services Performed 08/01/23 through 08/31/23

001 - EE Program Planning & Implementation								
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
8/1/2023	electric heat study		0.50			0.50	0.00	0.00
8/2/2023	measure life report		0.25			0.25	0.00	0.50
8/3/2023	measure life report; custom electric impact eval		0.25			0.25	0.00	0.25
8/4/2023	measure life study; custom electric study		0.50			0.50	0.00	0.25
8/8/2023	measure life study; 2024 plan		0.50			0.50	0.00	0.50
8/9/2023	custom electric impact eval; C&I call		0.75			0.75	0.00	0.50
8/10/2023	2024 plan		0.50			0.00	0.00	0.75
8/13/2023	custom electric impact eval		0.25			0.50	0.00	0.50
8/18/2023	2024 plan; custom electric impact eval		1.50			0.25	0.00	0.25
8/21/2023	2024 ev pl; EW impact report		0.75			1.50	0.00	1.50
8/22/2023	EWSF report		1.50			0.75	0.00	0.75
8/23/2023	EW report; res studies check-in call		1.50			1.50	0.00	1.50
8/24/2023	EW report; 2024 plan; C&I NTG study		2.00			1.50	0.00	1.50
8/25/2023	C&I NTG study; C&I kitchen eq study; EW impact report		1.75			2.00	0.00	2.00
8/26/2023	EW report		1.00			1.75	0.00	1.75
8/27/2023	EW report; custom gas report		1.25			1.00	0.00	1.00
8/29/2023	commercial kitchen equipment results		0.50			1.25	0.00	1.25
8/30/2023	custom gas impact report; EW report		1.00			0.50	0.00	0.50
8/31/2023	custom gas impact report		0.25			1.00	0.00	1.00
						0.25	0.00	0.25
						0.00	0.00	0.00
	Total Hours	0.00	16.50	0.00	0.00	16.50	0.00	16.50
	Total Amount	\$0.00	\$3,399.00	\$0.00	\$0.00	\$3,399.00	0.00	\$3,399.00

Rachel Sholly
48 Hudson Street, Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 68
Invoice Date: August 31, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount
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Services Performed 08/01/2023 through 08/31/2023

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	27.50	\$161.00	\$4,427.50
LABOR - Admin Hours	1.25	\$83.00	\$103.75
LABOR - Travel Hours	0.00	\$80.50	\$0.00

Travel Expenses \$0.00
(See attached travel expense form for details.)

TOTAL DUE **\$4,531.25**

Rachel Sholly

Services Performed 08/01/2023 through 08/31/2023

		001 - EE Program Planning & Implementation							
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	006-00 Administrative	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Sub-Total Admin Hrs.	Total Hours
08/02/23	C-team planning re: Council mtg agenda; Deliverables review w/Advocacy, follow-up strategizing			2.25		2.25	0.00	0.00	2.25
08/03/23	Drafted & circulated talking points for Advocacy call; Call w/Advocacy re: deliverables, timeline			1.00		1.00	0.00	0.00	1.00
08/04/23	Review & correspondence re: logo designs; Research, strategy & correspondence re: public awareness RFP			1.25		1.25	0.00	0.00	1.25
08/07/23	Correspondence re: brand/comms timeline & strategy			1.00		1.00	0.00	0.00	1.00
08/08/23	Reviewed & commented on Advocacy's update slides			0.50		0.50	0.00	0.00	0.50
08/09/23	C-team planning re: RFP & Advocacy; Reviewed & added to OER responses to vendor RFP questions; Drafted EdComm agenda			1.50		1.50	0.00	0.00	1.50
08/10/23	Strategized w/S. Chybowski (OER) re: brand/comms work & contract; EERMC Public Forum / HEZ Learning Community Workshop, connected w/related contacts			6.25		6.25	0.00	0.00	6.25
08/11/23	Strategized & updated timeline for RFP extension; Finalized EdComm agenda, related correspondence; Communications re: brand/comms work, reviewed contract & proposal; Call re: Advocacy performance			3.50		3.50	0.00	0.00	3.50
08/14/23	Compiled & sent EdComm mtg materials			0.50		0.50	0.00	0.00	0.50
08/15/23	Communications re: EdComm mtg; Call w/Steve re: EdComm mtg, RFP, Advocacy; Call w/Steve & Peter re: RFP, Advocacy, HEZ event			1.25		1.25	0.00	0.00	1.25
08/16/23	Updated awareness campaign RFP; C-team planning re: Council mtg prep; Edu activities; Posted lecture series flyer to meeting materials; Reviewed NH marketing RFP & vendor list; related correspondence			1.25	0.25	1.25	0.00	0.25	1.50
08/17/23	EERMC mtg			0.50		0.50	0.00	0.00	0.50
08/18/23	Updated RFP vendor list, related correspondence			0.25		0.25	0.00	0.00	0.25
08/24/23	Correspondence re: Advocacy mtg & project status			0.50		0.50	0.00	0.00	0.50
08/30/23	C-team planning re: lecture series, brand/comms; Reviewed & updated vendor contact list, followed up w/vendors on public awareness campaign RFP; Correspondence re: public events promo & prep, brand/comms mtg & mtg w/Encolor re: Clean Heat RI; Mtg w/Encolor re: Clean Heat RI program, follow-up connections; Mtg w/Advocacy & internal re: logo; Mtg w/URI re: lecture series			5.25		5.25	0.00	0.00	5.25
08/31/23	Logo design strategy, mtg prep & communication; Updated website with energy lecture series info			0.75	1.00	0.75	0.00	1.00	1.75
Total Hours		0.00	0.00	27.50	1.25	27.50	0.00	1.25	28.75
Total Amount		\$0.00	\$0.00	\$4,427.50	\$103.75	\$4,427.50	\$0.00	\$103.75	\$4,531.25



INVOICE

Invoice # 135
 Date: 11/13/2023
 Due On: 12/13/2023

38 Bellevue Avenue, Suite B
 Newport, Rhode Island 02840

RI Energy Efficiency Resource Management Council

00001-RI Energy Efficiency Resource Management Council

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	10/03/2023	Attention to EE docket filing. Emails with C-Team re: follow up tasks.	0.80	\$275.00	\$220.00
Service	10/04/2023	Review of Documents: Review of RIPUC Docket No. 23-35-EE	2.50	\$275.00	\$687.50
Service	10/04/2023	Drafting Documents: Reviewed Docket No. 23-35-EE, Docket No. 5076, and Drafted Summary for Atty.	3.10	\$275.00	\$852.50
Service	10/04/2023	Call with C-Team, attention to PUC docket.	0.50	\$275.00	\$137.50
Service	10/10/2023	Emails: C-Team re: updated bylaws. Attention to same. Attention to last docket order for EE Plan.	0.50	\$275.00	\$137.50
Service	10/11/2023	Legal Research: Legal Research and Atty. Email Correspondence.	1.30	\$275.00	\$357.50
Service	10/11/2023	File Management: Filing and organization for 2024-2026 Energy Efficiency Three-Year Plan & 2024 Energy Efficiency Annual Plan	0.30	\$275.00	\$82.50
Service	10/12/2023	Attention to C-Team questions.	0.30	\$275.00	\$82.50
Service	10/13/2023	Drafting Documents: Drafted Summary of Docket No. 5189 for Atty.	2.20	\$275.00	\$605.00
Service	10/16/2023	Review, revise and forward bylaws. Review and forward information to C-Team on compliance with PUC order. Attention to EE docket filing and meeting materials.	1.50	\$275.00	\$412.50
Service	10/16/2023	Attn to pre-filed testimony and preparation of same.	0.30	\$275.00	\$82.50
Service	10/17/2023	Emails: Agendas for meetings. Review same. C-Team, PUC re: EE docket. Attention to order from PUC.	1.40	\$275.00	\$385.00

Service	10/18/2023	Correspondences: PUC EE docket call re: procedural schedule. Emails re: hearing dates. Attention to filings. C-Team re: meetings. EFSB re: docket 5000.	1.30	\$275.00	\$357.50
Service	10/18/2023	Attn to status and upcoming hearing.	0.20	\$275.00	\$55.00
Service	10/18/2023	Drafting Documents: Drafting Summary of Docket No. 22-33-EE	1.30	\$275.00	\$357.50
Service	10/19/2023	Emails - EE Docket re: Data Request. Review same. Attention to statute for EE motion.	0.70	\$275.00	\$192.50
Service	10/19/2023	Appearance: Executive Committee and Full Committee meetings.	4.50	\$275.00	\$1,237.50
Service	10/20/2023	Attention to EE docket.	0.20	\$275.00	\$55.00
Service	10/20/2023	Drafting Documents: Drafted Motion for Docket No. 23-35-EE.	2.50	\$275.00	\$687.50
Service	10/20/2023	Drafting Documents: Drafted Summary of Docket No. 22-33-EE for Atty.	2.00	\$275.00	\$550.00
Service	10/23/2023	File Management: Updated Docket No. 23-35-EE File Documents	0.30	\$275.00	\$82.50
Service	10/23/2023	Attention to motion to intervene and EE filing with PUC.	1.20	\$275.00	\$330.00
Service	10/23/2023	Filing of Documents: Filing Notice of Intervention and Cost Effectiveness Report	1.40	\$275.00	\$385.00
Expense	10/24/2023	Reimbursable expenses: Mailing for Notice of Intervention and Cost Effectiveness Report	1.00	\$13.46	\$13.46
Service	10/26/2023	Emails: C-Team re: filing details. Review same. Review Data Request for EE Docket.	0.90	\$275.00	\$247.50
Service	10/27/2023	Attention to budget questions for filing and DR from DPUC. Email from PUC re: meeting attendance.	1.50	\$275.00	\$412.50
Service	10/27/2023	Correspondences: Responded to Atty. Inquiry Regarding First Data Request	0.40	\$275.00	\$110.00
Service	10/27/2023	Correspondences: Responded to Atty. Inquiry on 2nd Set of Data Requests.	0.40	\$275.00	\$110.00
Service	10/29/2023	Emails: C-Team re: EE docket filings. Begin reviewing same and attention to filing.	0.50	\$275.00	\$137.50
Service	10/30/2023	Attn to status.	0.20	\$275.00	\$55.00
Service	10/30/2023	Finish review of budget pre-file. Attention to filing of same, cover letter. Finalize and approve.	1.20	\$275.00	\$330.00
Service	10/30/2023	Filing of Documents: Filing testimony of Samuel C. Ross and Craig K. Johnson	5.50	\$275.00	\$1,512.50

Total \$11,260.96

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
135	12/13/2023	\$11,260.96	\$0.00	\$11,260.96
			Outstanding Balance	\$11,260.96
			Total Amount Outstanding	\$11,260.96

Please make all amounts payable to: Desautel Browning Law

Please pay within 30 days.

INVOICE
Federal Tax ID# 03-0351557



Remit checks to:
Optimal Energy, LLC
PO Box 74008680
Chicago, IL 60674-8680

Remit ACH transfer to:
ABA Routing Number 063100277
Account Number 898052466590
Email ACH/Wire remittance details to RemittanceNotifications@nv5.com

Remit Wire Transfers to:
ABA Routing Number 026009593
Account Number 898052466590
Swift Code INTL. BOFAUS3N

Steven Chybowski
Rhode Island Office of Energy Resources

September 30, 2023
Project No: 863223-0007525.00
Invoice No: 000000358226

Professional Services from September 1, 2023 to September 30, 2023

Phase 001 EE Prg Planning & Implementation Oversig

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount	
Johnson, Craig	2.50	193.00	482.50	
Ross, Samuel	1.50	206.00	309.00	
Totals	4.00		791.50	
Total Labor				791.50
				Total this Task
				\$791.50

Task 02 Implementation Oversight and Plan Develo

Professional Personnel

	Hours	Rate	Amount	
Caesar, Adrian	83.25	140.00	11,655.00	
Johnson, Craig	65.00	193.00	12,545.00	
Ross, Samuel	17.50	206.00	3,605.00	
Totals	165.75		27,805.00	
Total Labor				27,805.00

Consultants

Glenn Reed dba: GDR Consulting	824.00		
JENNIFER L. CHIODO DBA: JLC CONSULTING	515.00		
CORE ENERGY INSIGHTS INC.	1,109.75		
ECOMETRIC CONSULTING, LLC	1,957.00		
Energy Futures Group, Inc.	1,236.00		
RALPH PRAHL	927.00		
Total Consultants		6,568.75	6,568.75
			Total this Task
			\$34,373.75

Task 03 Education Initiatives

Professional Personnel

	Hours	Rate	Amount
Caesar, Adrian	3.00	140.00	420.00
Ross, Samuel	2.25	206.00	463.50
Totals	5.25		883.50
Total Labor			883.50

Consultants

Rachel Sholly			6,882.75
Total Consultants			6,882.75

Total this Task \$7,766.25

Total this Phase \$42,931.50

Phase 002 System Reliability Procurement

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount
Ross, Samuel	1.25	206.00	257.50
Totals	1.25		257.50
Total Labor			257.50

Total this Task \$257.50

Task 02 Plan Development and Oversight

Professional Personnel

	Hours	Rate	Amount
Ross, Samuel	2.00	206.00	412.00
Totals	2.00		412.00
Total Labor			412.00

Total this Task \$412.00

Total this Phase \$669.50

Phase 003 Regulatory Proceedings

Task 01 Council Representation

Professional Personnel

	Hours	Rate	Amount
Johnson, Craig	4.75	193.00	916.75
Ross, Samuel	6.50	206.00	1,339.00
Totals	11.25		2,255.75
Total Labor			2,255.75

Total this Task \$2,255.75

Task 02 Develop Technical Materials

Professional Personnel

	Hours	Rate	Amount
Caesar, Adrian	.25	140.00	35.00

Project	863223-0007525.00	Rhode Island EERMC - 2023		Invoice	000000358226
	Johnson, Craig		5.00	193.00	965.00
	Ross, Samuel		1.00	206.00	206.00
	Totals		6.25		1,206.00
	Total Labor				1,206.00
				Total this Task	\$1,206.00
				Total this Phase	\$3,461.75

Phase	004	Council Sponsored Meetings and Materials			
Task	01	Meeting Attendance			
Professional Personnel					
			Hours	Rate	Amount
	Caesar, Adrian		4.50	140.00	630.00
	Johnson, Craig		4.00	193.00	772.00
	Ross, Samuel		4.50	206.00	927.00
	Totals		13.00		2,329.00
	Total Labor				2,329.00
				Total this Task	\$2,329.00

Task	02	Develop Technical Materials			
Professional Personnel					
			Hours	Rate	Amount
	Caesar, Adrian		14.50	140.00	2,030.00
	Johnson, Craig		25.25	193.00	4,873.25
	Ross, Samuel		11.50	206.00	2,369.00
	Totals		51.25		9,272.25
	Total Labor				9,272.25
				Total this Task	\$9,272.25

Task	03	Other Council Responsibilities			
Professional Personnel					
			Hours	Rate	Amount
	Belliveau, Eric		1.75	220.00	385.00
	Johnson, Craig		3.00	193.00	579.00
	Ross, Samuel		1.50	206.00	309.00
	Totals		6.25		1,273.00
	Total Labor				1,273.00
				Total this Task	\$1,273.00
				Total this Phase	\$12,874.25

Phase	005	Research, Analysis, and Other Council Su			
Professional Personnel					
			Hours	Rate	Amount
	Caesar, Adrian		6.00	140.00	840.00
	Johnson, Craig		9.50	193.00	1,833.50
	Ross, Samuel		10.75	206.00	2,214.50
	Totals		26.25		4,888.00
	Total Labor				4,888.00

Total this Phase	\$4,888.00
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Phase	007	EERMC Intern
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Additional Fees

Monthly Intern Fee (Sept 2023)	3,750.00	
Total Additional Fees	3,750.00	3,750.00

Total this Phase	\$3,750.00
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Billing Limits

	Current	Prior	To-Date
Total Billings	68,575.00	441,568.99	510,143.99
Limit			717,025.00
Remaining			206,881.01

Total this Invoice	\$68,575.00
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Billings To Date

	Current	Prior	Total
Labor	51,373.50	302,987.75	354,361.25
Consultant	13,451.50	120,461.25	133,912.75
Expense	0.00	3,119.99	3,119.99
Add-on	3,750.00	15,000.00	18,750.00
Totals	68,575.00	441,568.99	510,143.99

Billing Backup

Thursday, November 2, 2023

NV5, Inc. Invoice 000000358226 Dated 9/30/2023 2:23:36 PM

Phase 001 EE Prg Planning & Implementation Oversig

Task 01 Council Representation

Professional Personnel

		Hours	Rate	Amount
Johnson, Craig	9/7/2023	1.25	193.00	241.25
Monthly-check-in w/ OER.				
Johnson, Craig	9/26/2023	1.00	193.00	193.00
Bi-Weekly meeting w/ OER and RIE.				
Johnson, Craig	9/29/2023	.25	193.00	48.25
EE TWG meeting.				
Ross, Samuel	9/12/2023	1.00	206.00	206.00
prep for, meeting with OER to discuss Council materials and meeting, next steps on plan review, etc.				
Ross, Samuel	9/29/2023	.50	206.00	103.00
EE TWG				
Totals		4.00		791.50
Total Labor				791.50
Total this Task				\$791.50

Task 02 Implementation Oversight and Plan Develo

Professional Personnel

		Hours	Rate	Amount
Caesar, Adrian	9/1/2023	3.25	140.00	455.00
RI EWG mtg. debrief; EWG 2024-2026 EE plan recommendations development; RICE PY2021 custom electric impact evaluation report draft review; C&I kitchen equipment ISP master results review; EM&V study tracker updates				
Caesar, Adrian	9/5/2023	4.25	140.00	595.00
2024 EE Plan Narrative and attachments OER comments review; RICEPY2021 custom electric evaluation report review, Kitchen Equipment ISP report review, EM&V study tracker updates; EWSF study follow ups/responses - secondary heating assumptions, participant year treatment vs. pre Wx, primary Elec heating consumption				
Caesar, Adrian	9/6/2023	.25	140.00	35.00
EWSF study follow ups/responses - secondary heating assumptions, participant year treatment vs. pre Wx, primary Elec heating consumption				
Caesar, Adrian	9/7/2023	3.50	140.00	490.00
2024-2026 EE/SRP plan review - updated EE plan narrative and attachments, Rate and bill impact models and narrative; C-Team EM&V check in - kitchen ISP report, RICE/RICG PY2021 comments, updated 2024 evaluation plan; 2021 Custom Gas impact evaluation revised report review				
Caesar, Adrian	9/8/2023	6.25	140.00	875.00
2024-2026 EE/SRP plan review - updated EE plan narrative and attachments, savings and spending comps, main text and narrative tracked changes review				

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000358226
Caesar, Adrian		9/11/2023	7.00	140.00	980.00	
	2024-2026 EE Plan - updated narrative and plan attachments review, tracked changes and RI Energy responses to C-team narrative comments, RI Energy responses to C-team data-related questions; C&I EM&V mtg. agenda development; RIE Participation dashboard walkthrough; equity recommendations and recommended metrics for 2024/2024-2026 3YP					
Caesar, Adrian		9/12/2023	8.50	140.00	1,190.00	
	2024-2026 EE Plan - updated narrative and plan attachments review, tracked changes and RI Energy responses to C-team narrative comments, RI Energy responses to C-team data-related questions; incremental costs for pre-Wx barriers and program BCR impacts scenario analysis; 2024-2026 EE plan program cost and savings deltas; C&I customer demographic profile analysis					
Caesar, Adrian		9/13/2023	5.25	140.00	735.00	
	C&I EM&V call prep/mtg; 2024-2026 EE Plan - updated narrative and plan attachments review, tracked changes and RI Energy responses to C-team narrative comments, RI Energy responses to C-team data-related questions; incremental costs for pre-Wx barriers and program BCR impacts scenario analysis; 2024-2026 EE plan program cost and savings deltas; equity recommendations and recommended metrics for 2024/2024-2026 3YP; TRC, incentive, and participant cost QA/QC; CI Kitchen ISP draft report review and comments					
Caesar, Adrian		9/14/2023	4.50	140.00	630.00	
	2024-2026 EE Plan - updated narrative and plan attachments review, tracked changes and RI Energy responses to C-team narrative comments, RI Energy responses to C-team data-related questions; 2024-2026 EE plan program cost and savings deltas; equity recommendations and recommended metrics for 2024/2024-2026 3YP; TRC, incentive, and participant cost QA/QC					
Caesar, Adrian		9/19/2023	4.50	140.00	630.00	
	2024-2026 EE Plan review - updated plan main text and attachments, Plan narrative redlines, BCR model analysis and program/measure savings and spending; RICEPY2022 custom elec impact eval workplan review					
Caesar, Adrian		9/20/2023	5.00	140.00	700.00	
	2024-2026 EE Plan review - BCR model analysis and program/measure savings and spending, end use savings trend analysis, corrected TRM database and impact factor QA; RICE lifetime savings adjustment factor reconciliation					
Caesar, Adrian		9/21/2023	6.75	140.00	945.00	
	2024-2026 EE Plan review - BCR model analysis and program/measure savings and spending, end use savings trend analysis, corrected TRM database and impact factor QA; 3YP comps to targets and plans/actuals; August C&I and Res data review and monthly data report development; C&I NTG study results analysis					
Caesar, Adrian		9/22/2023	4.75	140.00	665.00	
	2024 Equity working group recommendations matrix and memo development; 2024-2026 EE Plan review - BCR model analysis and program/measure savings and spending, end use savings trend analysis; 3YP comps to targets and plans/actuals; RIE responses to C-Team plan comments/additional flags; RI customer demographic analysis; EE Plan check in call w/ RI Energy and OER; TRM database updates and mapping to BCR, responses from RI energy					
Caesar, Adrian		9/25/2023	4.00	140.00	560.00	
	C&I Kitchen ISP report review, EM&V study tracker updates; 2024-2026 EE plan review and key takeaways/issues					
Caesar, Adrian		9/26/2023	3.00	140.00	420.00	

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000358226
		2024-2026 EE plan review - remaining issues and topics for filing review, responsiveness to EERMC priorities, EM&V update QA, impact factor and input corrections/impact quantification				
Caesar, Adrian	9/27/2023	5.50	140.00		770.00	
		Updated 2024-2026 EE plan review - plan BCR models, program and sector level savings and cost analysis, EMV impact factor updates and QA, Main text and plan attachments review				
Caesar, Adrian	9/28/2023	1.75	140.00		245.00	
		Updated 2024-2026 EE plan review - plan BCR models, program and sector level savings and cost analysis, Main text and plan attachments review; EWG recommendations attachment review				
Caesar, Adrian	9/29/2023	5.25	140.00		735.00	
		Updated 2024-2026 EE plan review - plan BCR models, program and sector level savings and cost analysis, plan attachments redline review; EWG Report and recommendations development; September 29 EWG meeting and follow ups				
Johnson, Craig	9/1/2023	3.75	193.00		723.75	
		Plan review - coordinate with Sam/Adrian on Rate and Bill Impact model review. EWG - debrief w/ Sam/Adrian on EWG meeting and next steps, including plan for providing additional feedback to Council on EWG input. Sector Team - coordinate w/ Adrian on Sector team meetings. Monthly check-in with sector team subs - discussed upcoming plan review tasks and sector team topics.				
Johnson, Craig	9/5/2023	.50	193.00		96.50	
		Coordinate/check-in w/ OER and stakeholders on comments submitted for first draft in prep for second draft plan review.				
Johnson, Craig	9/8/2023	2.00	193.00		386.00	
		Plan Review - Check-in meeting with Sam and Adrian to discuss strategy and timeline for reviewing second draft plan materials. Initial review of second draft materials delivered, and begin prep for review of narrative and quantitative review.				
Johnson, Craig	9/10/2023	1.25	193.00		241.25	
		Plan Review - Initial review of supplemental plan materials, including BC models, rate and bill impact models, responses to data questions, and redline documents.				
Johnson, Craig	9/11/2023	5.25	193.00		1,013.25	
		Plan Review - Review and distribute relevant plan materials to c-team subs for review with detailed instructions about review process and timeline. Review 2024 Plan materials, with focus on assessing responsiveness to feedback provided on first draft at August Council meeting, including equity and gas incentives. Analysis of incentive spending for Gas HVAC program. Ongoing discussions with Adrian and Sam re: same. EM&V - Review RIE responses and C-Team follow-up notes on EMSW IE study. Review notes from last EWG meeting and upcoming meeting schedule for group, discussion with internal team re: same. Meeting with Cadeo and RI Energy on updated participant/non-participant dashboard.				
Johnson, Craig	9/12/2023	7.75	193.00		1,495.75	
		Equity Working Group/Plan Review - Work on pulling together table of specific equity metrics based on feedback C-Team and stakeholders have provided to-date. Plan Review - Conduct analysis to determine if and how much funding could be allocated towards pre-weatherization barrier remediation while maintaining cost-effective programs. Analysis on changes between drafts for planned weatherization activity. Review Residential Attachment of second draft annual plan, focus on responsiveness to key residential items flagged at August Council meeting.				
Johnson, Craig	9/13/2023	6.75	193.00		1,302.75	

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		Plan Review - Continue plan review with focus on Residential and DPA attachments to evaluate responsiveness to key residential items flagged at August Council meeting. Review comment responses from Company on Residential Attachment, Main Text, DPA attachment, and 3YP Main Text. Review comments from residential sector team subs. Continue review of responses to data questions.				
Johnson, Craig	9/14/2023	5.25	193.00		1,013.25	
		Plan Review - Read through Main text and attachments for 3YP. Review RIE responses to data questions on annual and 3YP. Work on reviewing BC Models to cross-check and confirm responses to data questions incorporated. EWG - Work on matrix of potential specific metrics for EWG to consider.				
Johnson, Craig	9/15/2023	4.75	193.00		916.75	
		EWG - Quick initial review of EWG metrics matrix, emails w/ internal team re: same. Plan Review - Initial review of updated responses to data requests from RIE on annual and 3YPs. Review and provide updated plan materials to sector subs. Continue review of updated residential and main text attachments. Begin putting together list of key items to flag for RIE for final draft work. Plan BC Model Review - set up top measures by program analysis workbook for final review.				
Johnson, Craig	9/17/2023	.50	193.00		96.50	
		Communications with res sector subs on plan review.				
Johnson, Craig	9/18/2023	2.00	193.00		386.00	
		Plan Review - Continue review of Main Text with an eye towards responsiveness to Council priorities. Continue review and centralization of key outstanding comment to send to Company.				
Johnson, Craig	9/19/2023	6.75	193.00		1,302.75	
		EM&V/Plan Review - Review internal team discussion on savings assumptions for codes support. Plan Review - Continue reviewing RIE responses to data questions on annual and 3YP, flag outstanding items that still need to be addressed and tag items for follow-up with Company post-plan filing. Continue reviewing RIE responses to comments in residential attachment. Develop memo to Company on outstanding items we would like to see addressed in final draft.				
Johnson, Craig	9/20/2023	3.50	193.00		675.50	
		Plan review - review Sam's edits and updates to memo to the Company on outstanding comments. Make final edits and send to Company. Review and discuss C&I MF Gas issue with Adrian, add to memo and redistribute to Company. Equity - Frame up task for Jordan to work on to research and develop summaries of equity related performance incentive mechanisms in other jurisdictions.				
Johnson, Craig	9/21/2023	1.50	193.00		289.50	
		Plan Review - Coordination with Adrian re: incorporation of EM&V study results into Plan, strategize on message to send back to RIE.				
Johnson, Craig	9/22/2023	5.75	193.00		1,109.75	
		EWG - Review EWG matrix and plan material, draft thoughts and comments to EWG regarding process improvements for EWG moving forward. Discussion w/ Adrian, Sam, and Margie regarding same. Plan Review - Review RIE responses to C-Team memo on outstanding comments, prep for call w/ RIE, call w/ RIE to review and discuss.				
Johnson, Craig	9/27/2023	4.25	193.00		820.25	
		Review updated 3YP and AP materials distributed by RIE including narrative attachments and BC Models. Review program model comps for electric and gas portfolio to ID any major changes.				
Johnson, Craig	9/28/2023	1.00	193.00		193.00	
		Review updated plan materials to ID any remaining flags for Council. Initial review of Draft EWG report.				
Johnson, Craig	9/29/2023	2.50	193.00		482.50	

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		Review Residential data report and working on meeting agenda for October sector team meeting.		
Ross, Samuel	9/1/2023		1.00	206.00
		Team debrief on Plan review, future of gas, EWG, and other topics; coord workstreams for early next wk		206.00
Ross, Samuel	9/5/2023		.50	206.00
		check in with team to coord meeting materials, educ next steps, establish plan for rapid review when Plan materials received		103.00
Ross, Samuel	9/7/2023		1.50	206.00
		morning check in, afternoon call with Steve		309.00
Ross, Samuel	9/11/2023		4.50	206.00
		begin detailed review of Annual Plan comment responses and other changes		927.00
Ross, Samuel	9/12/2023		4.25	206.00
		morning check in re: path to finishing plan review; finish review of Annual Plan Main Text, extract key issues/remaining concerns; complete review of updated 3YP main text, extract remaining issues		875.50
Ross, Samuel	9/19/2023		.75	206.00
		coord review, early comments back to RIE on second drafts annual and 3YP.		154.50
Ross, Samuel	9/20/2023		2.00	206.00
		morning meeting coord cont plan review and assessment, EWG & educ next steps		412.00
Ross, Samuel	9/22/2023		1.00	206.00
		meeting with RIE to review comments from C-Team in memo to RIE re: 3YP and annual plan		206.00
Ross, Samuel	9/26/2023		1.50	206.00
		morning status check in, prep for and attend afternoon meeting with OER and RIE		309.00
Ross, Samuel	9/29/2023		.50	206.00
		Council meeting debrief and next steps		103.00
		Totals	165.75	27,805.00
		Total Labor		27,805.00
			Total this Task	\$34,373.75

Task	03	Education Initiatives	Hours	Rate	Amount
Professional Personnel					
Caesar, Adrian	9/12/2023		.50	140.00	70.00
		Clean Heat RI strategy and coordination call			
Caesar, Adrian	9/13/2023		.50	140.00	70.00
		EERMC branding and communications strategy mtg.; EERMC logo redesign			
Caesar, Adrian	9/19/2023		2.00	140.00	280.00
		URI Pier Lecture moderation - Participation in EE programs			
Ross, Samuel	9/1/2023		1.00	206.00	206.00
		Council branding meeting			
Ross, Samuel	9/8/2023		.75	206.00	154.50
		prep for, participate in branding working session			
Ross, Samuel	9/21/2023		.50	206.00	103.00
		Logo dev next steps			
		Totals	5.25		883.50
		Total Labor			883.50

Total this Task \$7,766.25

Total this Phase \$42,931.50

Phase 002 System Reliability Procurement

Task 01 Council Representation

Professional Personnel

			Hours	Rate	Amount
Ross, Samuel	9/20/2023		1.25	206.00	257.50
	SRP TWG + follow up				
	Totals		1.25		257.50
	Total Labor				257.50

Total this Task \$257.50

Task 02 Plan Development and Oversight

Professional Personnel

			Hours	Rate	Amount
Ross, Samuel	9/13/2023		2.00	206.00	412.00
	review SRP 3YP second draft, incl. review of response to EERMC comments on 1st draft				
	Totals		2.00		412.00
	Total Labor				412.00

Total this Task \$412.00

Total this Phase \$669.50

Phase 003 Regulatory Proceedings

Task 01 Council Representation

Professional Personnel

			Hours	Rate	Amount
Johnson, Craig	9/8/2023		1.00	193.00	193.00
	Monitor PUC Open Meeting on EE Implementation RFP.				
Johnson, Craig	9/18/2023		3.75	193.00	723.75
	Attend FoG meeting on behalf of EERMC				
Ross, Samuel	9/8/2023		2.00	206.00	412.00
	listening in on PUC tech session re: EE RFP				
Ross, Samuel	9/18/2023		2.50	206.00	515.00
	Listen in to, catch up on recent Future of Gas Docket proceedings in preparation for first TWG meeting Tuesday 9/19				
Ross, Samuel	9/19/2023		2.00	206.00	412.00
	attendance at FoG TWG meeting				
	Totals		11.25		2,255.75
	Total Labor				2,255.75

Total this Task \$2,255.75

Task 02 Develop Technical Materials

Professional Personnel

		Hours	Rate	Amount	
Caesar, Adrian	9/1/2023	.25	140.00	35.00	
Future of Gas Docket WG mtg. debrief					
Johnson, Craig	9/1/2023	.75	193.00	144.75	
Summarize meeting notes from 8/31 Future of Gas Meeting, debrief w/ Sam re: same.					
Johnson, Craig	9/15/2023	1.25	193.00	241.25	
Prep for FoG meeting - review materials.					
Johnson, Craig	9/18/2023	1.50	193.00	289.50	
Prep for FoG meeting, review materials, and finalize notes.					
Johnson, Craig	9/20/2023	.50	193.00	96.50	
EE Plan Cost-Effectiveness Report - Begin work on C-E report for 2024 Annual and 2024-2026 Three-Year EE Plans. Begin by reviewing past filed reports, and flagging items that need to be updated and/or checked for new updates.					
Johnson, Craig	9/21/2023	1.00	193.00	193.00	
Cost-Effectiveness Report - Work on outlining draft of updated C-E report for 3YP and Annual Plans.					
Ross, Samuel	9/19/2023	.50	206.00	103.00	
continued prep for FoG TWG meeting					
Ross, Samuel	9/22/2023	.50	206.00	103.00	
FoG TWG follow up conv					
Totals		6.25		1,206.00	
Total Labor					1,206.00
				Total this Task	\$1,206.00
				Total this Phase	\$3,461.75

Phase 004 Council Sponsored Meetings and Materials

Task 01 Meeting Attendance

Professional Personnel

		Hours	Rate	Amount	
Caesar, Adrian	9/14/2023	2.50	140.00	350.00	
September EERMC mtg/prep					
Caesar, Adrian	9/28/2023	2.00	140.00	280.00	
September 28 EERMC mtg.					
Johnson, Craig	9/14/2023	2.00	193.00	386.00	
EERMC meeting attendance					
Johnson, Craig	9/28/2023	2.00	193.00	386.00	
Attend and present materials at EERMC meeting					
Ross, Samuel	9/14/2023	2.25	206.00	463.50	
attend Council meeting					
Ross, Samuel	9/28/2023	2.25	206.00	463.50	
prep for, attend and present at EERMC meeting					
Totals		13.00		2,329.00	
Total Labor					2,329.00
				Total this Task	\$2,329.00

Task 02 Develop Technical Materials

Professional Personnel

Project	863223-0007525.00	Rhode Island EERMC - 2023		Invoice	000000358226
			Hours	Rate	Amount
Caesar, Adrian		9/1/2023	.25	140.00	35.00
	September 14 mtg. materials development/prep - 2024-2026 plan updates				
Caesar, Adrian		9/5/2023	.25	140.00	35.00
	September EERMC mtg prep - EE plan update presentation				
Caesar, Adrian		9/7/2023	.25	140.00	35.00
	2024-2026 EE Plan update presentation development - begin initial set up work				
Caesar, Adrian		9/8/2023	.75	140.00	105.00
	2024-2026 EE Plan update presentation development - continue initial set up work				
Caesar, Adrian		9/11/2023	.25	140.00	35.00
	2024-2026 EE plan presentation development - Work on C&I sector highlight slides.				
Caesar, Adrian		9/12/2023	1.50	140.00	210.00
	2024-2026 EE plan presentation development - Continue work on C&I sector highlight slides.				
Caesar, Adrian		9/13/2023	1.25	140.00	175.00
	2024-2026 EE plan presentation development - Finish work on C&I sector highlight slides.				
Caesar, Adrian		9/20/2023	.25	140.00	35.00
	EERMC October LEAD session planning				
Caesar, Adrian		9/21/2023	2.00	140.00	280.00
	2024-2026 EE Plan/2024 Annual plan - work on portfolio savings and budgets slides, Cost-effectiveness report presentation development				
Caesar, Adrian		9/22/2023	.50	140.00	70.00
	continue work on 2024-2026 EE Plan/2024 Annual plan presentation development				
Caesar, Adrian		9/25/2023	1.50	140.00	210.00
	2024-2026 EE Plan/2024 Annual plan presentation development - Work on C&I sector highlight slides.				
Caesar, Adrian		9/26/2023	3.00	140.00	420.00
	2024-2026 EE Plan/2024 Annual plan presentation development - finish work on slides.				
Caesar, Adrian		9/27/2023	1.00	140.00	140.00
	Updates to 2024-2026 EE Plan and 2024 Annual plan presentations based on final data received from Company.				
Caesar, Adrian		9/29/2023	1.75	140.00	245.00
	C-Team check in - EERMC mtg. follow ups, LEAD session agenda and potential topics, development of EERMC comments on 2024-2026 and 2024 Annual Plans				
Johnson, Craig		9/5/2023	.50	193.00	96.50
	Review September 14 meeting agenda, coordinate with team re: deliverables.				
Johnson, Craig		9/11/2023	1.25	193.00	241.25
	September Council Materials - Work on outline and content for 2nd draft 3YP and Annual Plan presentation.				
Johnson, Craig		9/12/2023	1.50	193.00	289.50
	Council Materials - Work on content for EE Plan review deck. Check-in meeting with OER on development of September Council materials. Working session with Sam and Adrian on material development. Review RIE presentation on 2nd draft plan update.				
Johnson, Craig		9/13/2023	.50	193.00	96.50

Project	863223-0007525.00	Rhode Island EERMC - 2023			Invoice	000000358226
		Council Materials - Review Sam and Adrian slides to-date, work on consolidating materials, assessment of responsiveness to council priorities, discuss with team re: same. Finish adding residential content to slides. Final review, polish, and delivery to OER.				
Johnson, Craig	9/14/2023		1.00	193.00	193.00	
		Council Materials - prep talking points. Prep for Council meeting with Sam and Adrian, review materials and discuss presentation rolls. Working session to review content needed to be developed for late September Council meeting.				
Johnson, Craig	9/15/2023		1.00	193.00	193.00	
		Begin assembling material needs for second september Council meeting.				
Johnson, Craig	9/20/2023		3.00	193.00	579.00	
		Working session with Sam and Rachel on LEAD session agenda development. September Council Materials Development - Begin assembling C-E Report reference materials and slide deck. Begin work on outlining two C-Team presentation on Annual and 3YR EE Plans. Review draft agenda for September Council Meeting, provide extensive feedback and recommended updated agenda to OER, coordination w/ Sam re: same.				
Johnson, Craig	9/21/2023		3.75	193.00	723.75	
		September Council Materials - Review agenda and discuss material development needs with Sam and Adrian. 3YP Deck - Discuss items to include in deck with Sam and Adrian. Work on outline and begin populating content. Annual Plan Deck - Discuss items to include in deck with Sam and Adrian. LEAD Session Topics Presentation - Review draft deck from Rachel, make edits and begin final polish. Cost-Effectiveness Report Presentation - Begin draft of deck. EERMC Logo Vote - coordinate with Rachel on development of deck. Meeting Agenda - correspondence with RIE and OER on agenda, propose slight restructuring based on feedback from RIE.				
Johnson, Craig	9/22/2023		1.75	193.00	337.75	
		September Council Materials - Check-in w/ team on materials development. Review, edit, and final polish on LEAD Session Presentation, Cost-Effectiveness Report Presentation, and Cost-Effectiveness Report material. Send completed materials to OER.				
Johnson, Craig	9/25/2023		3.00	193.00	579.00	
		September Council Materials - Review draft deck on Council logo review and vote. Draft updated version of slide deck, share internally for review. Check-in on materials development with Adrian and Sam.				
Johnson, Craig	9/26/2023		6.75	193.00	1,302.75	
		September Council Materials - Add residential highlight slide content to 3YP deck. Develop and finalize content for 3YP review deck, distribute to OER. Work on and finalize slides for Annual Plan deck. Review and provide feedback on recommended vote language.				
Johnson, Craig	9/27/2023		.50	193.00	96.50	
		Check-in meeting w/ Rachel on Council material presentation prep.				
Johnson, Craig	9/28/2023		.50	193.00	96.50	
		Prep talking points for Council meeting presentations.				
Johnson, Craig	9/29/2023		.25	193.00	48.25	
		Council debrief with Sam and Adrian, discussed plan for Council meeting agendas and materials through balance of the year.				
Ross, Samuel	9/13/2023		2.00	206.00	412.00	
		Review, add content to, refine and finalize Council presentation on EE Plans, disc. same with team				
Ross, Samuel	9/14/2023		3.50	206.00	721.00	
		Morning coordination of speaking roles and attendance; prepare for, meet with Councilor Oakley prior to Council meeting				
Ross, Samuel	9/20/2023		.50	206.00	103.00	

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		coord dev of council materials for 9/28		
Ross, Samuel		9/21/2023	1.25	206.00
		review and finalize CE presentation, LEAD session presentation		257.50
Ross, Samuel		9/22/2023	.75	206.00
		confirm plan for finalization, incl. partial delivery 9/22 and remaining materials early following week		154.50
Ross, Samuel		9/25/2023	1.00	206.00
		review current status, guide next steps on Council materials		206.00
Ross, Samuel		9/26/2023	2.50	206.00
		finalization of Council Materials for Thursday		515.00
		Totals	51.25	9,272.25
		Total Labor		9,272.25
			Total this Task	\$9,272.25

Task	03	Other Council Responsibilities		
Professional Personnel				
			Hours	Rate
				Amount
Belliveau, Eric		9/5/2023	1.25	220.00
		RI RFP scope review, compare to EVT, review funding path, electrification inclusion, federal funding, TRM and evaluation sections.		275.00
Belliveau, Eric		9/6/2023	.50	220.00
		continued review of RFP		110.00
Johnson, Craig		9/1/2023	.25	193.00
		Discussion w/ Sam re: next steps on EE Implementation RFP		48.25
Johnson, Craig		9/6/2023	1.50	193.00
		Continue review of EE Implementation RFP in prep for check-in with OER and upcoming PUC tech session. Emails w/ Eric and Sam re: same.		289.50
Johnson, Craig		9/12/2023	.25	193.00
		Check-in w/ Sam and Steve on EE Implementation RFP next steps.		48.25
Johnson, Craig		9/22/2023	1.00	193.00
		Check-in call with RIE on updated draft of EE Implementation RFP. Begin reviewing updates.		193.00
Ross, Samuel		9/12/2023	.50	206.00
		prep for, call with OER and Craig re: EE RFP next steps		103.00
Ross, Samuel		9/22/2023	1.00	206.00
		EE RFP meeting with OER		206.00
		Totals	6.25	1,273.00
		Total Labor		1,273.00
			Total this Task	\$1,273.00
			Total this Phase	\$12,874.25

Phase	005	Research, Analysis, and Other Council Su		
Professional Personnel				
			Hours	Rate
				Amount
Caesar, Adrian		9/12/2023	.50	140.00
		Clean Heat RI outreach and coordination strategy call		70.00
Caesar, Adrian		9/27/2023	3.25	140.00
		C-Team Council briefing w/ Chair Oakley; 2024-2026 EE plan findings and EM&V process summary/issues memo development		455.00
Caesar, Adrian		9/28/2023	2.25	140.00
		C-Team Council briefing w/ Chair Oakley		315.00

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Johnson, Craig		9/12/2023	.50	193.00	96.50	
		Meeting with Encolor to discuss Clean Heat RI Outreach Strategy.				
Johnson, Craig		9/25/2023	1.00	193.00	193.00	
		Review and provide comment on September Newsletter for Council.				
Johnson, Craig		9/27/2023	1.50	193.00	289.50	
		Councilor briefing meeting with Councilor Oakley. Review updated version of Newsletter.				
Johnson, Craig		9/28/2023	5.00	193.00	965.00	
		Councilor briefing prep with Chair Oakley.				
Johnson, Craig		9/29/2023	1.50	193.00	289.50	
		EC4 Meeting.				
Ross, Samuel		9/12/2023	.50	206.00	103.00	
		Encolor intro call re: Clean Heat program				
Ross, Samuel		9/19/2023	.50	206.00	103.00	
		corresp with Councilors re: meetings to discuss plan versions in advance of final vote on 9/28.				
Ross, Samuel		9/21/2023	3.25	206.00	669.50	
		several separate meetings with Councilors re: 3YP and Annual Plan input, prep re: same				
Ross, Samuel		9/25/2023	.50	206.00	103.00	
		brief call with Harry to coordinate meeting times and topics later in week, set stage for Council mtg expectations				
Ross, Samuel		9/27/2023	1.00	206.00	206.00	
		cont. conversation with Harry				
Ross, Samuel		9/28/2023	5.00	206.00	1,030.00	
		extended prep session with Councilor Oakley & C-Team on 3YP, annual plan, equity, PIM, EM&V, and other topics.				
		Totals		26.25	4,888.00	
		Total Labor				4,888.00
					Total this Phase	\$4,888.00
					Total this Project	\$64,825.00
					Total this Report	\$64,825.00

Margie Lynch/Core Energy Insights, Inc.
4445 E. Hoback River Road, Jackson, WY 83001

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 9-2023*
Invoice Date: *September 30, 2023*
OEI Project #: *7525*

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 09/01/23 through 09/30/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	5.75	\$193.00	\$1,109.75
LABOR - Travel Hours	0.00	\$96.50	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$1,109.75</u>



EcoMetric Consulting, LLC
41 Leopard Road, Suite 104
Paoli, PA 19301
610.400.8600
admin@ecometricconsulting.com

INVOICE

BILLED TO

Sam Ross
Optimal Energy - NV5
10600 Route 116, Suite 3
Hinesburg, VT 05461

TOTAL DUE

\$1,957.00

Project Name RI EERMC Consultant
Project # 7525
Invoice # 1029-P9-23
Billing Period 09/02/2023 - 09/29/2023

Invoice Date 10/04/2023
Due Date 11/03/2023
Payment Terms Net 30

Task Number	Description	Amount
001-02	Implementation Oversight & Plan Development	\$1,957.00

Subtotal \$1,957.00

Invoice Total \$1,957.00

Invoice Number 1029-P9-23
 Period 09/02/2023 - 09/29/2023

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EERMC Consultant	Implementation Oversight & Plan D	Salil Gogte	Partner	2023-09	0	\$ 220.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Michael Frischmann	Partner	2023-09	0	\$ 220.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Michael Honeychuck	Managing Consultant	2023-09	9.5	\$ 206.00	\$ 1,957.00
RI EERMC Consultant	Implementation Oversight & Plan D	Bitul Sinha	Managing Consultant	2023-09	0	\$ 206.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Cory Read	Data Scientist	2023-09	0	\$ 206.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Jake Fuller	Managing Consultant	2023-09	0	\$ 206.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Mary George	Sr Engineer	2023-09	0	\$ 166.00	\$ -
RI EERMC Consultant	Implementation Oversight & Plan D	Kyle McKenna	Managing Consultant	2023-09	0	\$ 206.00	\$ -
Total					9.50		\$ 1,957.00
Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EERMC Consultant		0 Salil Gogte	Partner	2023-09	0	\$ 220.00	\$ -
RI EERMC Consultant		0 Michael Frischmann	Partner	2023-09	0	\$ 220.00	\$ -
RI EERMC Consultant		0 Michael Honeychuck	Managing Consultant	2023-09	0	\$ 206.00	\$ -
RI EERMC Consultant		0 Bitul Sinha	Managing Consultant	2023-09	0	\$ 206.00	\$ -
RI EERMC Consultant		0		2023-09	0		\$ -
Total					-		\$ -

fname	local_date	hours	task	notes
Michael Honeychuck	9/6/2023	0.5	Implementation Oversight & Plan Development	Invoice & discussions Emails
Michael Honeychuck	9/7/2023	0.5	Implementation Oversight & Plan Development	Monthly check-in with Adrian
Michael Honeychuck	9/13/2023	2.5	Implementation Oversight & Plan Development	Monthly C&I call with RIE and C-Team Kitchen equipment ISP review & comments Emails
Michael Honeychuck	9/15/2023	1.5	Implementation Oversight & Plan Development	2021 Custom Gas & Electric reports review
Michael Honeychuck	9/18/2023	1.5	Implementation Oversight & Plan Development	2021 custom electric report review & comments
Michael Honeychuck	9/19/2023	1.5	Implementation Oversight & Plan Development	2021 custom electric report review & comments 2021 custom gas report review & comments
Michael Honeychuck	9/22/2023	1.5	Implementation Oversight & Plan Development	2022 custom electric workplan review Emails

Energy Futures Group, Inc.
PO Box 587
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 5983
Invoice Date: September 30, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services			Amount
Services Performed 09/01/2023 through 09/30/2023			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	6.00	\$206.00	\$1,236.00
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$1,236.00</u>

Energy Futures Group, Inc.

Services Performed 09/01/2023 through 09/30/2023

		001 - EE Program Planning & Implementation								
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	006-00 Administrative	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours	
9/1/2023	Res Team meeting		0.50				0.00	0.00	0.00	
9/5/2023	2024 plan follow-ups		0.50				0.50	0.00	0.50	
9/16/2023	Review 2024 Annual Plan		1.50				0.50	0.00	0.50	
9/17/2023	Review 2024 Annual Plan.		3.50				1.50	0.00	1.50	
							3.50	0.00	3.50	
							0.00	0.00	0.00	
							0.00	0.00	0.00	
							0.00	0.00	0.00	
	Total Hours	0.00	6.00	0.00	0.00	0.00	6.00	0.00	6.00	
	Total Amount	\$0.00	\$1,236.00	\$0.00	\$0.00	\$0.00	\$1,236.00	0.00	\$1,236.00	

GDR Consulting
576 Rutland St
Carlisle MA 01741

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: **9R**
Invoice Date: **September 5, 2023**
OEI Project #: **7525**

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 09/01/23 through 09/30/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	4.00	\$206.00	\$824.00
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$824.00</u>

GDR Consulting

Services Performed 09/01/23 through 09/30/23

		001 - EE Program Planning & Implementation								
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	006-00 Administrative	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours	
							0.00	0.00	0.00	
9/8/2023	Continued follow up w/J. Newberger on C&S savings attribution and 2024 Plan savings		0.50				0.50	0.00	0.50	
9/6/2023	Follow up on EWSF Impact evaluation: base electric heat consumption		0.25				0.25	0.00	0.25	
9/13/2023	Follow up w/J. Newberger on C&S savings attribution and 2024 Plan savings. Review and comment on revised draft Plan. Summary and analysis of appliance NTG impacts		2.25				2.25	0.00	2.25	
9/19/2023	Internal email discussion on C&S savings and EM&V		0.25				0.25	0.00	0.25	
9/21/2023	Follow up on CT MF program activity. Review and questions on Clean Heat RI		0.75				0.75	0.00	0.75	
							0.00	0.00	0.00	
	Total Hours	0.00	4.00	0.00	0.00	0.00	4.00	0.00	4.00	
	Total Amount	\$0.00	\$824.00	\$0.00	\$0.00	\$0.00	\$824.00	0.00	\$824.00	

Make Payable to: Jennifer Chiodo
JLC Consulting
52 Bent Creek Road
Hinesburg, VT 05416

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-23.05*
Invoice Date: *9/30/2023*
OEI Project #: *7525*

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 9/01/23 through 9/30/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	2.50	\$206.00	\$515.00
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$515.00</u>

Make Payable to: Jennifer Chiodo
Services Performed 9/01/23 through 9/30/23

001 - EE Program Planning & Implementation

Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
9/20/23	RI Plan review and comments		2.50			2.50	0.00	2.50
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
						0.00	0.00	0.00
	Total Hours	0.00	2.50	0.00	0.00	2.50	0.00	2.50
	Total Amount	\$0.00	\$515.00	\$0.00	\$0.00	\$515.00	0.00	\$515.00

Ralph Prah
7001 Stanhope Place, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 43
Invoice Date: September 30, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 09/01/23 through 09/30/23			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	4.50	\$206.00	\$927.00
LABOR - Travel Hours	0.00	\$103.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$927.00</u>

Ralph Prah

Services Performed 09/01/23 through 09/30/23

		001 - EE Program Planning & Implementation						
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
9/1/2023	custom electric impact report		0.25			0.25	0.00	0.00
9/4/2023	EW study; cust elec		0.75			0.75	0.00	0.25
9/6/2023	EW report		0.50			0.50	0.00	0.75
9/7/2023	kitch eq report		0.25			0.25	0.00	0.50
9/11/2023	2024 EM&V plan		0.25			0.25	0.00	0.25
9/12/2023	custom electric impact eval		0.25			0.25	0.00	0.25
9/17/2023	2024 plan; custom impact evals		0.50			0.00	0.00	0.25
9/20/2023	2024 plan		0.25			0.50	0.00	0.50
9/21/2023	custom gas impact report		0.25			0.25	0.00	0.25
9/25/2023	2024 plan; custom gas impact report; custom electric res plan		1.00			0.25	0.00	0.25
9/27/2023	custom impact evals		0.25			1.00	0.00	1.00
						0.25	0.00	0.25
						0.00	0.00	0.00
	Total Hours	0.00	4.50	0.00	0.00	4.50	0.00	4.50
	Total Amount	\$0.00	\$927.00	\$0.00	\$0.00	\$927.00	0.00	\$927.00

Rachel Sholly
48 Hudson Street, Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 69
Invoice Date: September 30, 2023
OEI Project #: 7525

Work Performed for RI Energy Efficiency & Resource Management Council

Description of Services	Amount		
Services Performed 09/01/2023 through 09/30/2023			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	42.75	\$161.00	\$6,882.75
LABOR - Admin Hours	0.00	\$83.00	\$0.00
LABOR - Travel Hours	0.00	\$80.50	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$6,882.75</u>

Rachel Sholly

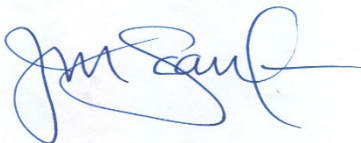
Services Performed 09/01/2023 through 09/30/2023

		001 - EE Program Planning & Implementation							
Date	Description of Services	001-01 Council Representation	001-02 Implementation Oversight & Plan Development	001-03 Education Initiatives	006-00 Administrative	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Sub-Total Admin Hrs.	Total Hours
09/01/23	Logo design mtg, incl. prep & follow-up call, notes & communication			2.25		2.25	0.00	0.00	2.25
09/05/23	Reviewed round 2 vendor questions for awareness campaign RFP and draft Council mtg agenda, related correspondence; Strategized on mission & elevator pitch incl. reviewing prior mtg notes, slides, timeline & work plan; Emailed brand/comms working group with summary & key questions			3.25		3.25	0.00	0.00	3.25
09/07/23	Working session w/Council members re: mission statement; Scheduled logo review mtg			1.00		1.00	0.00	0.00	1.00
09/08/23	Synthesized language for mission, purpose & elevator pitch; Compiled & circulated slides w/language & new logos; Draft EdComm agenda, sent to OER for review; Mission & logo review mtg & follow-up			6.50		6.50	0.00	0.00	6.50
09/09/23	Workshopped logo designs			3.00		3.00	0.00	0.00	3.00
09/10/23	Workshopped logo designs			2.75		2.75	0.00	0.00	2.75
09/11/23	Updated timelines & strategy for brand/comms & public awareness campaign; Finalized & sent EdComm mtg agenda & materials; Finalized & circulated logo designs for Council presentation; Coordinated w/Advocacy to finalize & post slides			4.00		4.00	0.00	0.00	4.00
09/13/23	Logo design; EdComm mtg; Logo design; Advocacy presentation prep call; Finalized new logo options, updated & posted final Advocacy slides; Prepared presentation notes			5.50		5.50	0.00	0.00	5.50
09/14/23	EERMC mtg - brand presentation			0.50		0.50	0.00	0.00	0.50
09/19/23	URI Energy Lecture #1			1.50		1.50	0.00	0.00	1.50
09/20/23	Compiled LEAD topics prior & potential; C-team planning re: LEAD session & brand/comms work; Logo mtg scheduling; Prep for brand check-in mtg; Drafted LEAD slides for Council mtg			3.00		3.00	0.00	0.00	3.00
09/22/23	Logo design & related communications			5.25		5.25	0.00	0.00	5.25
09/25/23	Prepared slides for logo presentation at Council mtg, related communications			2.00		2.00	0.00	0.00	2.00
09/27/23	C-team planning re: Council mtg education topics; Energy lecture promo; Call w/P. Case (Councilor) re: logo process			1.00		1.00	0.00	0.00	1.00
09/28/23	EERMC mtg - logo & LEAD presentations, EE Plan; Lecture series promotion			0.75		0.75	0.00	0.00	0.75
09/29/23	Updated timeline for awareness campaign RFP review			0.50		0.50	0.00	0.00	0.50
	Total Hours	0.00	0.00	42.75	0.00	42.75	0.00	0.00	42.75
	Total Amount	\$0.00	\$0.00	\$6,882.75	\$0.00	\$6,882.75	\$0.00	\$0.00	\$6,882.75

Certificate of Service

I hereby certify that a copy of the cover letter and any materials accompanying this certificate was electronically transmitted to the individuals listed below.

The paper copies of this filing are being hand delivered to the Rhode Island Public Utilities Commission and to the Rhode Island Division of Public Utilities and Carriers.



Joanne M. Scanlon

December 13, 2023

Date

**Docket No. 22-33-EE – Rhode Island Energy’s Energy Efficiency Plan 2023
Service list updated 8/4/2023**

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Paul.Roberti@dpuc.ri.gov ;		

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	Adrian.Caesar@nv5.com;	
	Craig.Johnson@nv5.com;	
	Samuel.Ross@nv5.com;	
Office of Energy Resources (OER) Albert Vitali, Esq. Dept. of Administration Division of Legal Services One Capitol Hill, 4 th Floor Providence, RI 02908	Albert.Vitali@doa.ri.gov;	401-222-8880
	Nancy.Russolino@doa.ri.gov;	
	Christopher.Kearns@energy.ri.gov;	
	Anika.Kreckel@energy.ri.gov;	
	William.Owen@energy.ri.gov;	
	Steven.Chybowski@energy.ri.gov;	
	Nathan.Cleveland@energy.ri.gov;	
Original & 9 copies file w/: Luly E. Massaro, Commission Clerk John Harrington, Commission Counsel Public Utilities Commission 89 Jefferson Blvd. Warwick, RI 02888	Luly.massaro@puc.ri.gov;	401-780-2107
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	Alan.nault@puc.ri.gov;	
	Todd.bianco@puc.ri.gov ;	
	Emma.Rodvien@puc.ri.gov;	
Interested Party		
Dept. of Human Services Frederick Sneesby	Frederick.sneesby@dhs.ri.gov;	
RI Infrastructure Bank Chris Vitale, Esq.,	cvitale@hvlawltd.com;	
	SUatine@riib.org;	
Green Energy Consumers Alliance Larry Chretien, Executive Director	Larry@massenergy.org;	
Amanda Barker	amanda@greenenergyconsumers.org;	
Acadia Center Emily Koo	ekoo@acadiacenter.org;	401-276-0600 x402