

PUC 1-1

Request:

Please provide a breakdown of billings (including totals) from Optimal Energy and its partners (the "C-Team") for work relating to the Three-Year Plan during 2023 (include estimated work through end of year).

Response:

Optimal Energy and its partners bill time associated with Three-Year Plan review under Task 1.2 – Implementation Oversight and Plan Development in their Scope of Work (SOW) with the Council. Task 1.2 encompasses a wide range of work streams beyond Three-Year Plan work. As a result, many of the C-Team's invoice entries under Task 1.2 include time that was not associated with Three-Year Plan work. For example, a member of the C-Team may spend two hours in a day on Task 1.2, with one hour spent on Three-Year Plan work and another hour spent on a sector team meeting. In responding to this request, the C-Team reviewed its billed work year-to-date and identified all entries that included work related to the Three-Year Plan. The C-Team then estimated the share of hours in 25% increments (i.e. 25%, 50%, 75%, or 100%) associated with Three-Year Plan work. The C-Team then rounded the estimated hours to the nearest quarter-hour increment to reflect its billing practices. Finally, the C-Team applied each staff's billing rate to the estimated hours to arrive at an estimated billing amount associated with Three-Year Plan work. The result of this review is presented in Table 1.

For the purposes of responding to this request, the C-Team considered "work relating to the Three-Year Plan" to mean resources spent on reviewing and providing feedback on the Three-Year Plan itself. Importantly, this means that works streams such as the Council's Priorities for the Three-Year Plan, Cost-Effectiveness Report development, Council meeting material development, and participation in this Docket were not considered in the development of the breakdown provided below. For this reason, the C-Team does not anticipate any additional work through the end of the year related to the Three-Year Plan. In total, the C-Team estimates 244.75 hours and \$40,976.50 have been allocated towards work related to the Three-Year Plan in 2023.

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Table 1

Date	Staff	Description	Hours	Amount	Estimated Share of Time on Three-Year Plan	Estimated Share of Hours on Three-Year Plan	Estimated Share of Amount Billed on Three-Year Plan
1/10/2023	Ross, Samuel	coord 3YP initial tasks workplan for week; coord w/OER re: Council budget and MPS next steps; corresp. re: MPS next steps	1.50	\$309.00	25%	0.50	\$103.00
1/12/2023	Caesar, Adrian	2024-2026 EERMC Priorities Development; C&I Sector Team call - prep and notetaking; reframing of EERMC priorities for underserved communities and equity; C&I meeting topic and 2024-2026 Annual/3YP gantt chart development	4.00	\$560.00	25%	1.00	\$140.00
3/22/2023	Johnson, Craig	3YP/Annual Plan - Begin preparing workstreams, including possible deep dive topics and analysis needs.	2.00	\$386.00	50%	1.00	\$193.00
3/23/2023	Caesar, Adrian	RI Energy 3YP proposal document review	0.50	\$70.00	100%	0.50	\$70.00
4/19/2023	Caesar, Adrian	Plan Outline Memo review coordination; 2024-2026 EE Plan Outline Memo review and comments; EWSF Wx impact evaluation follow-up; MPS refresh final results data upload to SharePoint for Sector Team reference; EM&V Study review/coordination - RNC Baseline Study one pager and proposed final report	3.00	\$420.00	25%	0.75	\$105.00
4/21/2023	Caesar, Adrian	2024-2026 EE Plan outline memo review; C&I kitchen equipment ISP study SOW review and C-Team comments; EM&V study tracker updates; Guidehouse responses to C-Team memo on TRM-BCR model mapping exercise;	2.75	\$385.00	25%	0.75	\$105.00
4/24/2023	Caesar, Adrian	Updated TRM DB and TRM-BCR Model mapping 4/21 ver.; 2024-2026 EE Plan deep dive mtg. scheduling; March Res data report updates and quarterly detailed data review; EM&V study coordination - EWSF impact eval responses, Res/IES electric heat market characterization study SOW	1.75	\$245.00	25%	0.50	\$70.00
4/25/2023	Keller, Michelle	SEMP discussion with Adrian; add comments to 2024-2026 3yr Plan Outline Memo	1.25	\$257.50	50%	0.75	\$154.50
4/26/2023	Caesar, Adrian	2024-2026 EE Plan outline memo comments; Monthly Residential EM&V call; BCR model update discussion/mtg. scheduling	0.75	\$105.00	50%	0.50	\$70.00

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4/27/2023	Caesar, Adrian	BCR model update mtg. coordination; 2024-2026 EE Plan outline memo development; Workforce Needs Assessment draft results presentation review and comments	1.50	\$210.00	50%	0.75	\$105.00
4/27/2023	Johnson, Craig	Finalize comments on RIE 2024-2026 Plan Outline Memo, discussion w/ Adrian and Sam re: same.	2.00	\$386.00	100%	2.00	\$386.00
5/9/2023	Lynch, Margie	Reviewed 3 YP outline; participated in and debriefed deep dive meeting w/Company reps re: possible program consolidation	1.75	\$337.75	50%	1.00	\$193.00
5/16/2023	Caesar, Adrian	2024-2026 BCR Model Updates Discussion prep; RI Energy Q1 Report Review; final Q1 Data updates; BCR Model updates Discussion w/ RI Energy	2.50	\$350.00	25%	0.75	\$105.00
5/22/2023	Caesar, Adrian	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;	2.50	\$350.00	50%	1.25	\$175.00
5/30/2023	Johnson, Craig	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.	2.25	\$434.25	25%	0.50	\$96.50
5/31/2023	Caesar, Adrian	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	4.25	\$595.00	50%	2.25	\$315.00
5/31/2023	Johnson, Craig	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.	3.25	\$627.25	50%	1.75	\$337.75
5/31/2023	EFG	Review RNC questions with G. Reed for RNC deep dive. Review 2024 three year plan preview memo.	0.75	\$154.50	50%	0.50	\$103.00

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6/1/2023	Caesar, Adrian	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	5.00	\$700.00	50%	2.50	\$350.00
6/1/2023	Johnson, Craig	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.	4.50	\$868.50	25%	1.25	\$241.25
6/1/2023	Ross, Samuel	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	1.75	\$360.50	25%	0.50	\$103.00
6/2/2023	Caesar, Adrian	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	1.75	\$245.00	75%	1.25	\$175.00
6/2/2023	Johnson, Craig	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.	5.25	\$1,013.25	25%	1.25	\$241.25
6/2/2023	Keller, Michelle	Prep for 3YP Draft review	0.25	\$51.50	100%	0.25	\$51.50
6/2/2023	Ross, Samuel	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	2.50	\$515.00	100%	2.50	\$515.00

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6/2/2023	Prahl, Ralph	WFD report, 3YP process	0.25	\$51.50	50%	0.25	\$51.50
6/6/2023	Caesar, Adrian	2024-2026 EE Plan first draft narrative review/comments; 2024-2026 EE Plan Deep Dive notes and follow-ups/open questions review and summary	0.50	\$70.00	100%	0.50	\$70.00
6/6/2023	Johnson, Craig	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.	3.75	\$723.75	100%	3.75	\$723.75
6/7/2023	Caesar, Adrian	2024-2026 EE Plan first draft narrative review/comments; 2024-2026 EE Plan Deep Dive notes and follow-ups/open questions review and summary	2.50	\$350.00	100%	2.50	\$350.00
6/7/2023	Johnson, Craig	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.	2.75	\$530.75	100%	2.75	\$530.75
6/8/2023	Johnson, Craig	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.	4.75	\$916.75	100%	4.75	\$916.75
6/8/2023	Ross, Samuel	finalize proposed 2024 Council budget numbers, comments on 3YP first draft	2.00	\$412.00	50%	1.00	\$206.00
6/13/2023	Caesar, Adrian	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	1.00	\$140.00	100%	1.00	\$140.00
6/13/2023	Johnson, Craig	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.	3.50	\$675.50	50%	1.75	\$337.75
6/13/2023	EFG	2024-26 Plan review	0.25	\$51.50	100%	0.25	\$51.50
6/15/2023	Caesar, Adrian	2024-2026 EE Plan narrative/Plan Outline memo review and feedback - C&I and EM&V content	0.75	\$105.00	100%	0.75	\$105.00
6/15/2023	Johnson, Craig	Continue review and comments on first draft of 3YP.	3.00	\$579.00	100%	3.00	\$579.00
6/19/2023	EFG	2024-26 Plan review	2.00	\$412.00	100%	2.00	\$412.00

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6/20/2023	Caesar, Adrian	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	3.75	\$525.00	50%	2.00	\$280.00
6/20/2023	Johnson, Craig	3YP Narrative Review - finalize review and clean up comments.	1.75	\$337.75	100%	1.75	\$337.75
6/20/2023	EFG	RI 2024-26 Plan review out.	1.50	\$309.00	100%	1.50	\$309.00
6/21/2023	Lynch, Margie	Participated in Equity Working Group meeting; reviewed and commented on 2024-2026 Plan updates and narrative	2.00	\$386.00	50%	1.00	\$193.00
6/23/2023	Chiodo, Jennifer	Review draft 3 year plan and comment	1.50	\$309.00	100%	1.50	\$309.00
6/26/2023	Caesar, Adrian	2024-2026 EE Plan review/C-Team comments; RICE2021 and RICG2021 custom site report review	0.75	\$105.00	50%	0.50	\$70.00
6/27/2023	Caesar, Adrian	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	6.50	\$910.00	25%	1.75	\$245.00
6/27/2023	Ross, Samuel	coord team review and comment consolidation for 3YP and EE Impl RFP	1.00	\$206.00	50%	0.50	\$103.00
6/27/2023	EFG	Review RIE 2024-26 Plan Narrative	3.00	\$618.00	100%	3.00	\$618.00
6/28/2023	Caesar, Adrian	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	3.75	\$525.00	50%	2.00	\$280.00
6/28/2023	Chiodo, Jennifer	3 year plan review	0.50	\$103.00	100%	0.50	\$103.00
6/29/2023	Caesar, Adrian	2024-2026 EE Plan narrative and program details review and C-Team comments consolidation; EE Plan analysis tool development and check-in	5.00	\$700.00	50%	2.50	\$350.00
6/30/2023	Caesar, Adrian	C-Team Working Session - 2024-2026 EE Plan narrative and program summary comments, initial quantitative analysis of 3YP data; EE Program implementation RFP review	2.00	\$280.00	75%	1.50	\$210.00
6/30/2023	Ross, Samuel	review, expand on, finalize, and submit C-Team consolidated comments on 3YP narrative draft	4.50	\$927.00	100%	4.50	\$927.00

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7/5/2023	Caesar, Adrian	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	5.50	\$770.00	50%	2.75	\$385.00
7/6/2023	Caesar, Adrian	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	8.25	\$1,155.00	75%	6.25	\$875.00
7/6/2023	Johnson, Craig	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.	4.75	\$916.75	100%	4.75	\$916.75
7/7/2023	Caesar, Adrian	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	4.50	\$630.00	75%	3.50	\$490.00
7/7/2023	Johnson, Craig	Catchup on Equity Working Group activities. First Draft 3YP Review - Begin review of BC models for residential and income eligible programs.	5.25	\$1,013.25	50%	2.75	\$530.75
7/10/2023	Caesar, Adrian	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	3.00	\$420.00	75%	2.25	\$315.00
7/10/2023	Johnson, Craig	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.	3.25	\$627.25	50%	1.75	\$337.75

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7/11/2023	Caesar, Adrian	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	7.25	\$1,015.00	100%	7.25	\$1,015.00
7/12/2023	Caesar, Adrian	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	7.00	\$980.00	75%	5.25	\$735.00
7/12/2023	Johnson, Craig	3YP Review - Conduct end-use level comparison between MPS and first draft 3YP for Residential and Low Income Programs.	4.75	\$916.75	100%	4.75	\$916.75
7/13/2023	Caesar, Adrian	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	6.25	\$875.00	75%	4.75	\$665.00
7/13/2023	Johnson, Craig	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.	4.75	\$916.75	75%	3.50	\$675.50
7/14/2023	Caesar, Adrian	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,	2.50	\$350.00	100%	2.50	\$350.00

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		TRC/incentive and savings distribution over 3YP term comps; EE plan analysis check-in					
7/14/2023	Johnson, Craig	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.	4.25	\$820.25	100%	4.25	\$820.25
7/17/2023	Johnson, Craig	3YP Review - Coordination with subs on program and measure level plan review. Develop summary tables with comparisons for measures for each program.	4.75	\$916.75	100%	4.75	\$916.75
7/18/2023	Johnson, Craig	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.	6.00	\$1,158.00	75%	4.50	\$868.50
7/19/2023	Caesar, Adrian	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	3.50	\$490.00	100%	3.50	\$490.00
7/19/2023	Johnson, Craig	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.	8.00	\$1,544.00	75%	6.00	\$1,158.00
7/20/2023	Caesar, Adrian	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	4.75	\$665.00	75%	3.50	\$490.00

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		program data review and report development					
7/20/2023	Johnson, Craig	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.	3.75	\$723.75	100%	3.75	\$723.75
7/21/2023	Johnson, Craig	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.	4.50	\$868.50	100%	4.50	\$868.50
7/21/2023	Ross, Samuel	follow ups from EERMC, coord team to prepare for final stretch of 3YP quant review and QA	0.75	\$154.50	50%	0.50	\$103.00
7/24/2023	Caesar, Adrian	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;	7.25	\$1,015.00	75%	5.50	\$770.00
7/24/2023	Johnson, Craig	3YP Review - continue review of inputs for top res and IE measures, focusing on savings and cost assumptions.	2.50	\$482.50	100%	2.50	\$482.50
7/24/2023	Chiodo, Jennifer	24-26 Plan Data review	1.25	\$257.50	100%	1.25	\$257.50
7/25/2023	Caesar, Adrian	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	3.25	\$455.00	50%	1.75	\$245.00
7/26/2023	Johnson, Craig	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	5.75	\$1,109.75	50%	3.00	\$579.00

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		pump study survey guides, emails w/ EM&V team regarding same.					
7/27/2023	Johnson, Craig	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.	4.00	\$772.00	50%	2.00	\$386.00
7/28/2023	Caesar, Adrian	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	5.25	\$735.00	50%	2.75	\$385.00
8/1/2023	Johnson, Craig	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.	2.75	\$530.75	25%	0.75	\$144.75
9/7/2023	Caesar, Adrian	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	3.50	\$490.00	25%	1.00	\$140.00
9/8/2023	Caesar, Adrian	2024-2026 EE/SRP plan review - updated EE plan narrative and attachments, savings and spending comps, main text and narrative tracked changes review	6.25	\$875.00	25%	1.50	\$210.00
9/11/2023	Caesar, Adrian	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	7.00	\$980.00	50%	3.50	\$490.00

Responses prepared by the Executive Director and Executive Secretary of the EERMC, in collaboration with the EERMC's Consultant Team.

Rhode Island Energy Efficiency and Resource Management Council
RIPUC Docket No. 22-35-EE
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Responses to the Commission’s First Set of Data Requests
Issued November 27, 2023

		recommended metrics for 2024/2024-2026 3YP					
9/12/2023	Caesar, Adrian	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	8.50	\$1,190.00	50%	4.25	\$595.00
9/12/2023	Ross, Samuel	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	4.25	\$875.50	50%	2.25	\$463.50
9/13/2023	Caesar, Adrian	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	5.25	\$735.00	50%	2.75	\$385.00
9/13/2023	Johnson, Craig	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.	6.75	\$1,302.75	50%	3.50	\$675.50

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RIPUC Docket No. 22-35-EE
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Responses to the Commission's First Set of Data Requests
Issued November 27, 2023

9/14/2023	Caesar, Adrian	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	4.50	\$630.00	75%	3.50	\$490.00
9/14/2023	Johnson, Craig	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.	5.25	\$1,013.25	50%	2.75	\$530.75
9/15/2023	Johnson, Craig	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.	4.75	\$916.75	50%	2.50	\$482.50
9/19/2023	Caesar, Adrian	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	4.50	\$630.00	100%	4.50	\$630.00
9/19/2023	Johnson, Craig	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.	6.75	\$1,302.75	50%	3.50	\$675.50

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Issued November 27, 2023

9/19/2023	Ross, Samuel	coord review, early comments back to RIE on second drafts annual and 3YP.	0.75	\$154.50	50%	0.50	\$103.00
9/20/2023	Caesar, Adrian	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	5.00	\$700.00	50%	2.50	\$350.00
9/21/2023	Caesar, Adrian	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	6.75	\$945.00	50%	3.50	\$490.00
9/22/2023	Caesar, Adrian	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	4.75	\$665.00	75%	3.50	\$490.00
9/22/2023	Ross, Samuel	meeting with RIE to review comments from C-Team in memo to RIE re: 3YP and annual plan	1.00	\$206.00	50%	0.50	\$103.00
9/25/2023	Caesar, Adrian	C&I Kitchen ISP report review, EM&V study tracker updates; 2024-2026 EE plan review and key takeaways/issues	4.00	\$560.00	50%	2.00	\$280.00
9/26/2023	Caesar, Adrian	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	3.00	\$420.00	100%	3.00	\$420.00
9/27/2023	Caesar, Adrian	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	5.50	\$770.00	50%	2.75	\$385.00
9/27/2023	Johnson, Craig	Review updated 3YP and AP materials distributed by RIE including narrative attachments and BC Models. Review program	4.25	\$820.25	50%	2.25	\$434.25

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RIPUC Docket No. 22-35-EE
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Responses to the Commission’s First Set of Data Requests
Issued November 27, 2023

		model comps for electric and gas portfolio to ID any major changes.					
9/28/2023	Caesar, Adrian	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	1.75	\$245.00	50%	1.00	\$140.00
9/29/2023	Caesar, Adrian	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	5.25	\$735.00	50%	2.75	\$385.00
10/16/2023	Caesar, Adrian	2024-2026 EE Plan data related questions and Plan narrative/attachments comments compilation; filed plan TRM database QA/QC analysis and comps to TRM document	3.25	\$455.00	50%	1.75	\$245.00
10/17/2023	Caesar, Adrian	2024-2026 EE Plan data related questions and Plan narrative/attachments comments compilation; C&I building envelope and custom/PL lighting data analysis	2.50	\$350.00	50%	1.25	\$175.00
Subtotal			378.00	\$62,445.25		244.75	\$40,976.50

Responses prepared by the Executive Director and Executive Secretary of the EERMC, in collaboration with the EERMC’s Consultant Team.

PUC 1-2

Request:

Please provide a breakdown of billings (including totals) from the C-Team for work on the Future of Gas docket (Docket No. 22-01-NG) during 2023 (include estimated work through end of year).

Response:

Optimal Energy and its partners bill time associated with the Future of Gas Docket under Task 3 – Regulatory Proceedings in their SOW with the Council. Task 3 encompasses work streams beyond the Future of Gas work. As a result, some of the C-Team’s invoice entries under Task 3 include time that was not associated with the Future of Gas Docket. In responding to this request, the C-Team reviewed its billed work year-to-date and identified all entries that included work related to the Future of Gas. The C-Team then estimated the share of hours in 25% increments (i.e. 25%, 50%, 75%, 100%) associated with the Future of Gas Docket. The C-Team then rounded the estimated hours to the nearest quarter-hour increment to reflect its billing practices. Finally, the C-Team applied each staff’s billing rate to the estimated hours to arrive at an estimated billing amount associated with work related to the Future of Gas Docket. The result of this review is presented in Table 2.

For work through the end of the year, the C-Team estimates an additional 15 hours and \$2,562.00. This estimate is based on the C-Team’s expected participation in remaining Future of Gas Docket meetings, as well as an assumed level of effort to prepare for meetings and to continue providing input on work produced included in the Docket. Our total estimate for work related to the Future of Gas Docket, inclusive of estimated work through the end of the year, is 129.5 hours and \$24,370.75.

Table 2

Date	Staff	Description	Hours	Amount	Estimated Share of Time on Future of Gas Docket	Estimated Share of Hours on Future of Gas Docket	Estimated Share of Amount Billed on Future of Gas Docket
2/10/2023	Caesar, Adrian	Discussion w/ Sam and Craig re: future of gas docket and tracking of other PUC/Division dockets for EERMC	0.50	\$70.00	50%	0.25	\$35.00

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RIPUC Docket No. 22-35-EE
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Responses to the Commission's First Set of Data Requests
Issued November 27, 2023

2/17/2023	Caesar, Adrian	February EERMC mtg. debrief and action item coordination - Future of Gas docket, regulatory and legislative proceeding tracking; Future of Gas docket announcement and scope review	1.25	\$175.00	50%	0.75	\$105.00
2/24/2023	Ross, Samuel	morning check in coord. councilor future of gas stakeholder committee applications, review and edits re: same; review of updated priorities memo preamble language	1.25	\$257.50	50%	0.75	\$154.50
2/24/2023	Caesar, Adrian	Future of Gas Docket planning	0.25	\$35.00	100%	0.25	\$35.00
2/24/2023	Johnson, Craig	Draft statements of intention for Councilor Oakley and AnderBois for participation in the Future of Gas Docket. Coordination w/ Sam on draft, send drafts to Councilors.	1.25	\$241.25	100%	1.25	\$241.25
2/27/2023	Johnson, Craig	Review Sue's final version of statement of intention to participate in Future of Gas docket stakeholder committee. Coordinate next steps on submitting statement.	0.50	\$96.50	100%	0.50	\$96.50
3/2/2023	Caesar, Adrian	Future of Gas docket prep; regulatory/legislative tracking for EERMC updates	0.25	\$35.00	50%	0.25	\$35.00
3/2/2023	Johnson, Craig	Finalize and distribute statements of intention to participate in future of gas docket stakeholder committee for Sue and Harry.	0.25	\$48.25	100%	0.25	\$48.25
3/2/2023	Ross, Samuel	final plans re: Councilor Oakley future of gas filing	0.25	\$51.50	100%	0.25	\$51.50
3/6/2023	Johnson, Craig	Review statement of intentions from other parties looking to participate in future of gas docket stakeholder committee.	0.25	\$48.25	100%	0.25	\$48.25
3/8/2023	Johnson, Craig	Draft opening statement for Chair Oakley to review for use at first stakeholder committee meeting in Future of Gas docket.	0.75	\$144.75	100%	0.75	\$144.75
3/10/2023	Johnson, Craig	Attend stakeholder committee in future of natural gas docket on behalf of Chair Oakley. Prep for meeting and review materials.	5.00	\$965.00	100%	5.00	\$965.00
5/4/2023	Johnson, Craig	Review upcoming meeting notices for Future of Gas Docket. Review responses to PUC DRs in LCP Standards docket.	0.25	\$48.25	50%	0.25	\$48.25
5/25/2023	Johnson, Craig	Prep review materials in advance of upcoming stakeholder meeting on future of gas docket	0.50	\$96.50	100%	0.50	\$96.50
5/30/2023	Johnson, Craig	Attend Future of Gas Docket Stakeholder Committee meeting.	4.50	\$868.50	100%	4.50	\$868.50
5/30/2023	Ross, Samuel	Represent Councilor Oakley at future of gas docket	6.00	\$1,236.00	100%	6.00	\$1,236.00
5/30/2023	Johnson, Craig	Debrief on Future of Gas Docket Stakeholder meeting with Sam. Plan out research assignments on NEPOOL certificates to inform	1.25	\$241.25	100%	1.25	\$241.25

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Responses to the Commission's First Set of Data Requests
Issued November 27, 2023

		thinking in future of gas docket and in carbon accounting discussions.					
5/31/2023	Ross, Samuel	future of gas docket debrief w/team	0.50	\$103.00	100%	0.50	\$103.00
6/9/2023	Johnson, Craig	Review meeting minutes and plan for upcoming meetings in future of gas stakeholder committee docket.	0.50	\$96.50	100%	0.50	\$96.50
6/20/2023	Johnson, Craig	Future of Gas Stakeholder Committee meeting	3.50	\$675.50	100%	3.50	\$675.50
6/20/2023	Ross, Samuel	prep for, attend, debrief on future of gas docket	5.50	\$1,133.00	100%	5.50	\$1,133.00
6/26/2023	Ross, Samuel	prep for, attend Future of gas debrief with Councilors AnderBois, Teichert, Gill Case	2.00	\$412.00	100%	2.00	\$412.00
7/19/2023	Ross, Samuel	populate rough draft word doc with future of gas TWG nomination content	1.50	\$309.00	100%	1.50	\$309.00
7/20/2023	Johnson, Craig	Future of Gas Docket - Review draft nomination letter for participation in docket technical working group. Provide comments and feedback, discussions re: same with Sam.	1.00	\$193.00	100%	1.00	\$193.00
7/21/2023	Ross, Samuel	review comments on, finalize, and distribute Future of Gas TWG nomination to Councilors for review, then PUC	2.00	\$412.00	100%	2.00	\$412.00
7/24/2023	Johnson, Craig	Monitor Future of Gas docket stakeholder committee meeting.	1.75	\$337.75	100%	1.75	\$337.75
7/24/2023	Ross, Samuel	attend future of gas docket	5.50	\$1,133.00	100%	5.50	\$1,133.00
7/24/2023	Ross, Samuel	prep for, debrief on future of gas docket stakeholder meeting	2.50	\$515.00	100%	2.50	\$515.00
8/31/2023	Johnson, Craig	Attendance at Future of Gas Stakeholder Committee meeting.	4.50	\$868.50	100%	4.50	\$868.50
8/31/2023	Ross, Samuel	listen in for part of Future of Gas docket proceeding, incl. networked geothermal presentation; confirm coverage and takeaways for balance of mtg w/CJohnson	1.25	\$257.50	100%	1.25	\$257.50
8/31/2023	Johnson, Craig	Prep for Future of Gas Meeting - review meeting notes from previous meetings, review previous meeting materials, review stakeholder comments.	2.00	\$386.00	100%	2.00	\$386.00
9/1/2023	Ross, Samuel	Team debrief on Plan review, future of gas, EWG, and other topics; coord workstreams for early next wk	1.00	\$206.00	100%	1.00	\$206.00
9/1/2023	Caesar, Adrian	Future of Gas Docket WG mtg. debrief	0.25	\$35.00	100%	0.25	\$35.00
9/1/2023	Johnson, Craig	Summarize meeting notes from 8/31 Future of Gas Meeting, debrief w/ Sam re: same.	0.75	\$144.75	100%	0.75	\$144.75
9/15/2023	Johnson, Craig	Prep for FoG meeting - review materials.	1.25	\$241.25	100%	1.25	\$241.25
9/18/2023	Johnson, Craig	Attend FoG meeting on behalf of EERMC	3.75	\$723.75	100%	3.75	\$723.75

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Issued November 27, 2023

9/18/2023	Ross, Samuel	Listen in to, catch up on recent Future of Gas Docket proceedings in preparation for first TWG meeting Tuesday 9/19	2.50	\$515.00	100%	2.50	\$515.00
9/18/2023	Johnson, Craig	Prep for FoG meeting, review materials, and finalize notes.	1.50	\$289.50	100%	1.50	\$289.50
9/19/2023	Ross, Samuel	attendance at FoG TWG meeting	2.00	\$412.00	100%	2.00	\$412.00
9/19/2023	Ross, Samuel	continued prep for FoG TWG meeting	0.50	\$103.00	100%	0.50	\$103.00
9/22/2023	Ross, Samuel	FoG TWG follow up conv	0.50	\$103.00	100%	0.50	\$103.00
10/3/2023	Ross, Samuel	prep for, attend Future of Gas meeting	4.00	\$824.00	100%	4.00	\$824.00
10/17/2023	Ross, Samuel	prep for, attend Future of Gas TWG, follow ups re: same	3.75	\$772.50	100%	3.75	\$772.50
10/18/2023	Caesar, Adrian	Future of Gas Docket Wx analysis discussion and workplan; 2024-2026 EE plan docket procedural schedule	0.50	\$70.00	50%	0.25	\$35.00
10/19/2023	Caesar, Adrian	Future of Gas Docket Wx analysis discussion and workplan - weatherization benchmarking and EE assumptions, industrial savings inputs for model scenarios; DPUC first set of data requests to RI Energy review	0.75	\$105.00	50%	0.50	\$70.00
10/24/2023	Ross, Samuel	prep for, attend, follow up on Future of Gas Stakeholder Committee meeting	6.50	\$1,339.00	100%	6.50	\$1,339.00
10/24/2023	Caesar, Adrian	Future of Gas docket - weatherization forecast scenarios, building saturation analysis; E3 heating electrification scenario analysis and assumptions review; EERMC pre-file testimony memo - EE plan review process and comments for regulatory review	6.50	\$910.00	50%	3.25	\$455.00
10/25/2023	Caesar, Adrian	C-Team check-in on Future of Gas docket - E3 modeling assumptions, EE contribution to gas consumption over time; EERMC pre-filed testimony development - Council budget development, Council review of 2024-2026 EE Plans	3.75	\$525.00	50%	2.00	\$280.00
10/26/2023	Caesar, Adrian	EERMC pre-filed testimony on budget development; Future of Gas docket - E3 modeling assumptions, EE contribution to gas consumption over time	1.75	\$245.00	50%	1.00	\$140.00
11/1/2023	Ross, Samuel	prep for, attend FoG	2.50	\$515.00	100%	2.50	\$515.00
11/2/2023	Ross, Samuel	check in on ongoing tasks, next steps on Ri Data Snapshot, debrief on Advocacy check in mtg, prep talking points for FoG and other topics for Fri morning team mtg, review equity section of pre-filed testimony	1.00	\$206.00	25%	0.25	\$51.50

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Responses to the Commission’s First Set of Data Requests
Issued November 27, 2023

11/7/2023	Caesar, Adrian	Future of Gas Docket check in - review of inputs and E3 modeling assumptions, insulation/Wx market saturation data and gas energy forecasting comps; EERMC pre-file testimony development - plan review process, EWG process; Weatherization saturation, baseline, and adoption analysis for future of gas modeling discussion, state building consumption and savings data disaggregation and analysis	6.50	\$910.00	25%	1.75	\$245.00
11/7/2023	Keating, Griffith	Future of Gas Docket check in - review of inputs and E3 modeling assumptions, insulation/Wx market saturation data and gas energy forecasting comps	0.50	\$70.00	100%	0.50	\$70.00
11/8/2023	Caesar, Adrian	Future of Gas Docket check in - review of inputs and E3 modeling assumptions, insulation/Wx market saturation data and gas energy forecasting comps; Weatherization saturation, baseline, and adoption analysis for future of gas modeling scenarios, state building consumption and savings data disaggregation and analysis; E3 future of gas input compendium workbook review; EERMC pre-file testimony development - Council plan review and EWG process	6.00	\$840.00	50%	3.00	\$420.00
11/14/2023	Ross, Samuel	prep for, attend FoG TWG meeting	2.25	\$463.50	100%	2.25	\$463.50
11/14/2023	Caesar, Adrian	Future of Gas docket insulation/weatherization potential analysis and modeling scenario review/working session	1.25	\$175.00	100%	1.25	\$175.00
11/14/2023	Johnson, Craig	Future of Gas Docket - Meeting with Sam to discuss strategy on whether or not to submit comments to PUC on scenario design.	0.25	\$48.25	100%	0.25	\$48.25
11/20/2023	Caesar, Adrian	Future of Gas docket Weatherization potential analysis and benchmarking	1.50	\$210.00	100%	1.50	\$210.00
11/21/2023	Caesar, Adrian	Review of RI Energy data request responses to PUC/DPUC; Future of Gas docket Weatherization building saturation analysis, insulation, Wx, and building envelope savings potential estimates	0.50	\$70.00	50%	0.25	\$35.00
11/28/2023	Ross, Samuel	future of gas stakeholder committee	5.50	\$1,133.00	100%	5.50	\$1,133.00
11/29/2023	Caesar, Adrian	Future of Gas Docket coordination - check in planning with modeling TWG; Docket 23-35 EE Plan PUC and DPUC data request/RI Energy responses review and data request tracker updates; PUC data request to EERMC response development	2.50	\$350.00	25%	0.75	\$105.00

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Responses to the Commission’s First Set of Data Requests
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11/30/2023	Caesar, Adrian	C-Team check in - Docket 23-35 data requests to RIE and EERMC, Future of Gas docket analysis review with E3; Docket 23-35 EE Plan PUC and DPUC data request/RI Energy responses review and data request tracker updates; Existing Building weatherization opportunity and potential analysis for FOG Modeling Working Group, historical program Wx performance data	4.50	\$630.00	50%	2.25	\$315.00
11/30/2023	Ross, Samuel	Council data request discussion and plan for completion; check in with Adrian on data for E3 to incorporate into FoG EE assumptions around envelope measures	0.50	\$103.00	50%	0.25	\$51.50
Total			135.00	\$24,777.75		114.50	\$21,808.75

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 In Re: 2024 Energy Efficiency Plan and 2024-2026 Three-Year Plan
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 Issued November 27, 2023

PUC 1-3

Request:

Please provide a breakdown of billings (including totals) from the C-Team for work on the updates to the LCP Standards (Docket No. 23-07-EE) during 2023 (include estimated work through end of year).

Response:

Optimal Energy and its partners bill time associated with updates to the Least Cost Procurement Standards under Task 3 – Regulatory Proceedings in their SOW with the Council. Task 3 encompasses work streams beyond the work related to Least Cost Procurement Standards updates. As a result, some of the C-Team’s invoice entries under Task 3 include time that was not associated with the Least Cost Procurement Standards update. In responding to this request, the C-Team reviewed its billed work year-to-date and identified all entries that included work related to the Least Cost Procurement Standards update. The C-Team then estimated the share of hours in 25% increments (i.e. 25%, 50%, 75%, 100%) associated with the Least Cost Procurement Standards update. The C-Team then rounded the estimated hours to the nearest quarter-hour increment to reflect its billing practices. Finally, the C-Team applied each staff’s billing rate to the estimated hours to arrive at an estimated billing amount associated with the Least Cost Procurement Standards update. The C-Team does not anticipate any additional work on updates to the LCP Standards through the end of the year. The result of this review is presented in Table 3. In total, the C-Team estimates 44.75 hours and \$8,498.25 have been allocated towards work related to updates to the Least Cost Procurement Standards in 2023.

Table 3

Date	Staff	Description	Hours	Amount	Estimated Share of Time on LCP Standards Updates	Estimated Share of Hours on Updated LCP Standards	Estimated Share of Amount Billed on Updated LCP Standards
1/4/2023	Johnson, Craig	Reviewed recent regulatory updates on 2023 EE plan, needs for Council legal to coordinate items related to Council budget, target filing, and LCP standards update process. Coordinate with Marisa regarding these items. Review docket 5015 to review timeline of LCP Standards updates during last three-year plan.	2.00	\$386.00	50%	1.00	\$193.00

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In Re: 2024 Energy Efficiency Plan and 2024-2026 Three-Year Plan
Responses to the Commission’s First Set of Data Requests
Issued November 27, 2023

2/7/2023	Johnson, Craig	Meeting w/ EERMC and PUC Counsel to discuss procedural process for requesting extension for target filing as well as estimated timeline for LCP standards updates. Associated meeting prep and debrief w/ e-mail re: next steps to Sam, Steve, and Marisa.	0.50	\$96.50	25%	0.25	\$48.25
2/7/2023	Johnson, Craig	Review LCP Standards, statutory requirements, and EERMC filing for 2021-2024 targets to help inform development of 2024-2026 targets.	2.50	\$482.50	25%	0.75	\$144.75
3/31/2023	Johnson, Craig	Initial high-level scan/review of PUC proposed edits to LCP Standards.	0.50	\$96.50	100%	0.50	\$96.50
4/4/2023	Caesar, Adrian	LCP Standards Updates review and comments/tech session prep	0.50	\$70.00	100%	0.50	\$70.00
4/4/2023	Johnson, Craig	Review PUC draft edits to LCP Standards, initial discussion w/ Sam and Adrian re: same. Draft clarifying questions in prep for PUC Tech Session on Thursday.	1.50	\$289.50	100%	1.50	\$289.50
4/4/2023	Ross, Samuel	coord work for wk, incl. review of LCP redlines and plan for tech session	0.50	\$103.00	100%	0.50	\$103.00
4/5/2023	Caesar, Adrian	LCP Standards Updates review and comments; LCP standards - proposed PUC edits review session	0.50	\$70.00	100%	0.50	\$70.00
4/5/2023	Ross, Samuel	cont. LCP coord	0.50	\$103.00	100%	0.50	\$103.00
4/6/2023	Caesar, Adrian	LCP Standards Updates PUC Technical Session	1.50	\$210.00	100%	1.50	\$210.00
4/6/2023	Johnson, Craig	Tech Session on LCP Standards updates	1.50	\$289.50	100%	1.50	\$289.50
4/6/2023	Caesar, Adrian	LCP Standards Updates review and comments; Technical session on LCP standards notes review	0.50	\$70.00	100%	0.50	\$70.00
4/6/2023	Johnson, Craig	Prep for Tech Session w/ Sam and Adrian	0.50	\$96.50	100%	0.50	\$96.50
4/6/2023	Ross, Samuel	LCP next steps	0.50	\$103.00	100%	0.50	\$103.00
4/7/2023	Caesar, Adrian	LCP Standards updates - development of comments/edits on behalf of EERMC	0.50	\$70.00	100%	0.50	\$70.00
4/7/2023	Caesar, Adrian	Technical session on LCP standards notes review; LCP Standards Tech Session Debrief w/OER	0.50	\$70.00	100%	0.50	\$70.00
4/7/2023	Johnson, Craig	Review notes from PUC Tech Session on LCP Standards updates, discussion w/ Sam, Adrian, and Marissa re: same. Debrief call w/ OER.	1.75	\$337.75	100%	1.75	\$337.75
4/7/2023	Ross, Samuel	LCP debriefs (internal and w/OER)	1.50	\$309.00	100%	1.50	\$309.00
4/12/2023	Johnson, Craig	Discuss LCP Standards update comment timeline and next steps with Sam.	0.25	\$48.25	100%	0.25	\$48.25
4/17/2023	Johnson, Craig	LCP Standards - Begin compiling comments and proposed edits for LCP Standards update.	2.25	\$434.25	100%	2.25	\$434.25

Responses prepared by the Executive Director and Executive Secretary of the EERMC, in collaboration with the EERMC’s Consultant Team.

Rhode Island Energy Efficiency and Resource Management Council
RIPUC Docket No. 22-35-EE
In Re: 2024 Energy Efficiency Plan and 2024-2026 Three-Year Plan
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Issued November 27, 2023

4/18/2023	Johnson, Craig	LCP Standards - Continue compiling comments and proposed edits for LCP Standards update. Revisit/review comments provided during 2020 revision process.	1.75	\$337.75	100%	1.75	\$337.75
4/19/2023	Johnson, Craig	Work on comment markup of LCP Standards for submission to PUC on Friday.	1.00	\$193.00	100%	1.00	\$193.00
4/19/2023	Ross, Samuel	review LCP standards draft comments, add/edit same.	1.25	\$257.50	100%	1.25	\$257.50
4/21/2023	Johnson, Craig	Coordination call w/ OER to review their comments on LCP Standards Update as well as give overview of our initial set on behalf of the Council. Coordinate with Council legal on filing comments with PUC.	1.25	\$241.25	100%	1.25	\$241.25
4/21/2023	Caesar, Adrian	LCP standards proposed redlines - EERMC and C-Team feedback and proposed edits; RI Energy and OER LCP standards comments review	0.50	\$70.00	100%	0.50	\$70.00
4/21/2023	Johnson, Craig	Review notes from Council meeting related to LCP Standards update comment filing. Final review and clean-up of initial set of comments on LCP Standards update, discussions w/ Sam regarding same. Review RIE comments on LCP standards.	4.00	\$772.00	100%	4.00	\$772.00
4/26/2023	Johnson, Craig	Review LCP Standards requirements for EERMC Targets report, Finalize targets report and compile all files necessary for Targets Report filing, discussion w/ Marisa re: same. Initial review of PUC first set of data requests in Docket 23-07-EE to EERMC, OER, and RIE. Draft initial thoughts on responses for EERMC.	3.00	\$579.00	0%	0.00	\$0.00
4/27/2023	Johnson, Craig	EERMC 2024-2026 EE Targets Filing - Discussion w/ Marisa re: filing. Continue review of LCP Standard comments from other parties to help inform discussion at Council LEAD Session.	1.25	\$241.25	50%	0.75	\$144.75
5/2/2023	Johnson, Craig	Finalize write up of responses to PUC data request to EERMC in LCP Standards docket.	1.00	\$193.00	100%	1.00	\$193.00
5/3/2023	Ross, Samuel	LCP DR response development, review, team discussion	2.00	\$412.00	100%	2.00	\$412.00
5/4/2023	Johnson, Craig	Review upcoming meeting notices for Future of Gas Docket. Review responses to PUC DRs in LCP Standards docket.	0.25	\$48.25	50%	0.25	\$48.25
7/5/2023	Caesar, Adrian	EERMC 3YP Targets filing PUC information request; updated LCP Standards and PUC responses to comments review	0.75	\$105.00	50%	0.50	\$70.00
7/5/2023	Johnson, Craig	Initial high-level review of updated version of LCP Standards. Initial review of PUC IRs on Targets.	2.50	\$482.50	50%	1.25	\$241.25

Responses prepared by the Executive Director and Executive Secretary of the EERMC, in collaboration with the EERMC's Consultant Team.

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RIPUC Docket No. 22-35-EE
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Issued November 27, 2023

7/6/2023	Johnson, Craig	Continue review of updated version of LCP Standards - compare updated version with EERMC comments and RIE comments.	1.50	\$289.50	100%	1.50	\$289.50
7/10/2023	Johnson, Craig	Coordinate on deadlines for submitting responses to PUC DR on EERMC filed Targets, as well as next steps on LCP Standards updates.	0.25	\$48.25	50%	0.25	\$48.25
7/11/2023	Johnson, Craig	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.	2.75	\$530.75	100%	2.75	\$530.75
7/12/2023	Ross, Samuel	thorough review of LCP redlines from commission, including review of C. Johnson initial comments and proposed continued input to Commission	2.00	\$412.00	100%	2.00	\$412.00
7/13/2023	Johnson, Craig	LCP Standards Update Review - Review Sam's comments on latest iteration, discussion re: same.	1.50	\$289.50	100%	1.50	\$289.50
7/13/2023	Ross, Samuel	continued review of LCP redlines, incl. review of reply comments from C Johnson, and additional edits.	1.50	\$309.00	100%	1.50	\$309.00
7/14/2023	Johnson, Craig	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.	1.00	\$193.00	100%	1.00	\$193.00
7/14/2023	Ross, Samuel	finalization of LCP comments	1.00	\$206.00	100%	1.00	\$206.00
7/21/2023	Caesar, Adrian	PUC Memo on Updated LCP Standards review	0.25	\$35.00	100%	0.25	\$35.00
7/27/2023	Johnson, Craig	Monitor PUC Open Meeting re: LCP Standards updates.	0.25	\$48.25	100%	0.25	\$48.25
Total			52.75	\$10,029.00		44.75	\$8,498.25

Responses prepared by the Executive Director and Executive Secretary of the EERMC, in collaboration with the EERMC's Consultant Team.

PUC 1-4

Request:

Please provide a breakdown of billings (including totals) from the C-Team for any non-energy efficiency related work during 2023 (include estimated work through end of year).

Response:

The C-Team, with few exceptions, considers nearly all of its work in support of the Council's role in providing oversight of energy efficiency programs delivered by Rhode Island Energy. For the purposes of responding to this request, the C-Team considered "non-energy efficiency related work" to apply to the following workstreams in 2023:

- All of the C-Team's work related to System Reliability Procurement under Task 2 in its SOW with the Council
- C-Team support on review and updates to the Council's By-Laws, provided under Task 5 in its SOW with the Council

Because Optimal Energy and its partners bill time associated with a variety of items under Tasks 5 that aren't related to what the C-Team has considered as "non-energy efficiency related work", the C-Team reviewed its billed work year-to-date and identified all entries that included work related to non-energy efficiency work. The C-Team then estimated the share of hours in 25% increments (i.e. 25%, 50%, 75%, 100%) associated with non-energy efficiency work. The C-Team then rounded the estimated hours to the nearest quarter-hour increment to reflect its billing practices. Finally, the C-Team applied each staff's billing rate to the estimated hours to arrive at an estimated billing amount associated with non-energy efficiency work. The results of this review are presented in Tables 4 and 5.

For work through the end of the year, the C-Team estimates an additional 1.5 hours and \$309.00. This estimate is based on the C-Team's expected remaining workload under Task 2 – System Reliability Procurement. The C-Team does not at this time anticipate any other non-energy efficiency related work. Our total estimate for non-energy efficiency related work, inclusive of estimated work through the end of the year, is 49.5 hours and \$9,810.50.

Rhode Island Energy Efficiency and Resource Management Council
RIPUC Docket No. 22-35-EE
In Re: 2024 Energy Efficiency Plan and 2024-2026 Three-Year Plan
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Issued November 27, 2023

Table 4 | Task 2 – System Reliability Procurement

Date	Staff	Description	Hours	Amount	Estimated Share of Time on Non-Energy Efficiency Work	Estimated Share of Hours on Non-Energy Efficiency Work	Estimated Share of Amount Billed on Non-Energy Efficiency Work
1/5/2023	Ross, Samuel	SRP TWG prep call w/ Carrie Gill	1.00	\$206.00	100%	1.00	\$206.00
1/10/2023	Ross, Samuel	SRP timeline coord w/C Gill	0.25	\$51.50	100%	0.25	\$51.50
1/12/2023	Ross, Samuel	finalize SRP draft 3YP priorities, support timeline finalization	0.50	\$103.00	100%	0.50	\$103.00
1/18/2023	Ross, Samuel	prep for, present at SRP TWG regarding Expected Valuation, discuss same and other SRT TWG agenda items	1.50	\$309.00	100%	1.50	\$309.00
1/26/2023	Ross, Samuel	SRP TWG and RI presentation for AESP call w/C Gill, prep re: same	1.25	\$257.50	100%	1.25	\$257.50
2/7/2023	Ross, Samuel	review SRP TWG presentation draft from C. Gill, comment and revise and send back	2.00	\$412.00	100%	2.00	\$412.00
2/10/2023	Ross, Samuel	review final SRP TWG materials, share last comments w/CGill for finalization	0.50	\$103.00	100%	0.50	\$103.00
2/15/2023	Ross, Samuel	SRP TWG attendance	1.00	\$206.00	100%	1.00	\$206.00
2/15/2023	Ross, Samuel	SRP TWG prep	0.25	\$51.50	100%	0.25	\$51.50
4/19/2023	Ross, Samuel	SRP TWG Attendance	1.00	\$206.00	100%	1.00	\$206.00
4/19/2023	Ross, Samuel	SRP TWG materials review/prep	0.50	\$103.00	100%	0.50	\$103.00
5/17/2023	Ross, Samuel	attend, present at SRP TWG	1.00	\$206.00	100%	1.00	\$206.00
5/17/2023	Ross, Samuel	develop SRP priorities deck, share same with OER	1.50	\$309.00	100%	1.50	\$309.00
5/26/2023	Ross, Samuel	review SRP 2022 Year End Report	1.00	\$206.00	100%	1.00	\$206.00
6/7/2023	Ross, Samuel	attend SRP elec forecasting mtg	1.00	\$206.00	100%	1.00	\$206.00
7/19/2023	Ross, Samuel	attend SRP TWG	1.00	\$206.00	100%	1.00	\$206.00
7/25/2023	Ross, Samuel	SRP 3YP discussion with Carrie Gill	1.00	\$206.00	100%	1.00	\$206.00
8/15/2023	Ross, Samuel	initial review of SRP 3YP draft	2.00	\$412.00	100%	2.00	\$412.00
8/16/2023	Ross, Samuel	SRP TWG attendance	1.00	\$206.00	100%	1.00	\$206.00
8/16/2023	Caesar, Adrian	2024-2026 SRP plan narrative review	0.50	\$70.00	100%	0.50	\$70.00
8/16/2023	Ross, Samuel	review of SRP plans	0.25	\$51.50	100%	0.25	\$51.50
8/22/2023	Ross, Samuel	final review, finalize comments on SRP 3YP.	3.00	\$618.00	100%	3.00	\$618.00
9/13/2023	Ross, Samuel	review SRP 3YP second draft, incl. review of response to EERMC comments on 1st draft	2.00	\$412.00	100%	2.00	\$412.00
9/20/2023	Ross, Samuel	SRP TWG + follow up	1.25	\$257.50	100%	1.25	\$257.50
10/18/2023	Ross, Samuel	prep for, attend SRP TWG	1.25	\$257.50	100%	1.25	\$257.50

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Issued November 27, 2023

10/19/2023	Caesar, Adrian	RI Energy 2024-2026 SRP plan review; Gas Demand Response proposal and presentation review	1.50	\$210.00	100%	1.50	\$210.00
11/8/2023	Johnson, Craig	Pre-File Testimony - Check-in with Sam and Adrian regrading Council pre-file testimony. Working session with Adrian to review comments from Sam and I and to talk through next steps for iterating on testimony. Assist Adrian and updating some content by providing key dates in plan review process. Review Adrian updates to latest iteration and provide further comments and distribute to Sam for review. SRP 2024-2026 Plan Cost-Effectiveness Report - Draft report and distribute to Sam for internal review.	3.75	\$723.75	50%	2.00	\$386.00
11/9/2023	Johnson, Craig	Pre-File Testimony development - Review Sam's comments on latest version and work to address comments throughout. Flag remaining items for Adrian to address in his next pass. Review OER draft comment letter in EE Plan Docket. SRP 2024-2026 Plan Cost-Effectiveness Report - Review Sam's edits and comments on draft report, finalize report and prepare for submission to Council.	6.00	\$1,158.00	50%	3.00	\$579.00
11/15/2023	Ross, Samuel	SRP TWG	1.00	\$206.00	100%	1.00	\$206.00
11/29/2023	Ross, Samuel	DR BCA model review, attend call with RIE team to discuss Qs	1.50	\$309.00	100%	1.50	\$309.00
11/29/2023	McDonald, Clifford	BCA call	1.00	\$206.00	100%	1.00	\$206.00
Total			42.25	\$8,444.75		37.50	\$7,528.00

Table 5 | Council ByLaws Support Provided Under Task 5

Date	Staff	Description	Hours	Amount	Estimated Share of Time on Non-Energy Efficiency Work	Estimated Share of Hours on Non-Energy Efficiency Work	Estimated Share of Amount Billed on Non-Energy Efficiency Work
2/22/2023	Caesar, Adrian	EERMC Bylaws development/updates	0.25	\$35.00	100%	0.25	\$35.00

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Rhode Island Energy Efficiency and Resource Management Council
RIPUC Docket No. 22-35-EE
In Re: 2024 Energy Efficiency Plan and 2024-2026 Three-Year Plan
Responses to the Commission's First Set of Data Requests
Issued November 27, 2023

2/24/2023	Caesar, Adrian	EERMC Bylaws development; February ExCom mtg. recording and minutes review	1.25	\$175.00	50%	0.75	\$105.00
2/28/2023	Johnson, Craig	Working session w/ Sam and Adrian - discussed Council By-Laws review. Review current draft of Council By-Laws and feedback received at February ExCom. Prepare and send draft version to ExCom and Council legal for initial review.	2.25	\$434.25	100%	2.25	\$434.25
3/8/2023	Johnson, Craig	Review proposed revisions to Council By-Laws to inform development of Council material on topic.	1.00	\$193.00	100%	1.00	\$193.00
3/29/2023	Johnson, Craig	By-Laws updates - review notes from Council meeting, coordinate w/ EERMC legal to discuss proposed changes and open questions. AESC introduction/kick off call w/ Matt, Brett, and Steve.	1.50	\$289.50	75%	1.25	\$241.25
3/30/2023	Johnson, Craig	Check-in call w/ Kerin and Steve re: Council By-Laws updates, prep by reviewing current iteration of by-laws updates. Debrief on EWG call w/ Adrian, Sam, and Margie.	1.25	\$241.25	50%	0.75	\$144.75
3/31/2023	Johnson, Craig	Councilor briefing w/ Sue and Peter - discussed legislative updates, bylaws, and LCP standards.	1.00	\$193.00	25%	0.25	\$48.25
4/5/2023	Johnson, Craig	Review Kerin comments on ByLaw updates, send e-mail requesting for comments on newer version.	0.25	\$48.25	100%	0.25	\$48.25
4/20/2023	Johnson, Craig	Review Kerin's comments on EERMC ByLaw edits in prep for ExCom meeting.	0.50	\$96.50	100%	0.50	\$96.50
7/13/2023	Johnson, Craig	Review latest iteration of Council ByLaws and prepare update for Council.	0.50	\$96.50	100%	0.50	\$96.50
7/18/2023	Johnson, Craig	Review Council ByLaws, prep thoughts on next steps for ExCom meeting.	0.50	\$96.50	100%	0.50	\$96.50
10/6/2023	Johnson, Craig	Review latest iteration of Council ByLaws, consolidate and summarize feedback from Council legal team, and distribute near final draft to legal team for final review before bringing back to ExCom.	2.00	\$386.00	100%	2.00	\$386.00
10/17/2023	Johnson, Craig	Coordinate Marisa with next steps on Council ByLaws.	0.25	\$48.25	100%	0.25	\$48.25
Total			12.50	\$2,333.00		10.50	\$1,973.50

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PUC 1-5

Request:

Please provide a table showing the proposed C-Team budget for 2024 broken down by task and sub-tasks. (A table similar to the table in the C-Team’s Proposed 2023 Scope of Work Content, Objectives, and Budget.)

Response:

The C-Team has provided a draft version of its proposed budget for 2024, broken down by task and sub-task, in Table 6.

Table 6

Tasks and Sub-Tasks	Hours	Budget
Task 1: Energy Efficiency Program Planning and Implementation Oversight	2,319	\$436,450
<i>Task 1.1: Council Representation</i>	95	\$20,200
<i>Task 1.2: Implementation Oversight and Plan Development</i>	1,894	\$350,350
<i>Task 1.3: Education Initiatives</i>	329	\$65,899
Task 2: System Reliability Procurement	30	\$6,658
<i>Task 2.1: Council Representation</i>	12	\$2,653
<i>Task 2.2: Plan Development and Oversight</i>	18	\$4,005
Task 3: Regulatory Proceedings	403	\$77,487
<i>Task 3.1: Council Representation</i>	107	\$22,101
<i>Task 3.2: Develop Technical Materials</i>	296	\$55,386
Task 4: Council Sponsored Meetings and Materials	639	\$118,832
<i>Task 4.1: Meeting Attendance</i>	118	\$21,733
<i>Task 4.2: Develop Technical Materials</i>	388	\$70,921
<i>Task 4.3: Other Council Responsibilities</i>	134	\$26,178
Task 5: Research, Analysis, and Other Council Support	709	\$143,847
Task 6: Administrative	44	\$3,751
Task 7: EERMC Intern	600	\$30,000
Total	4,744	\$817,025

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PUC 1-6

Request:

Please provide a breakdown of how much Optimal Energy’s interns were paid, by year, for the years 2021-2023 (include estimated work through end of year).

Response:

Table 7 provides a breakdown of how much Optimal Energy’s interns were paid, by year, for the years 2021-2023. It also contains a subtotal that includes the sum of compensation paid to interns and coordination fees charged to Optimal Energy by the URI’s Cooperative Extension.

For 2021, total expenses equal \$0.00 because Optimal Energy did not have an intern as part of its contract with the EERMC. For 2022, the total compensation paid was lower than expected due to a conflict that required the intern to conclude their work approximately three months earlier than anticipated. For 2023, total compensation is inclusive of estimated work through the end of the year.

Table 7

Year	Gross Compensation Paid to Interns by Optimal Energy	Coordination Fee Billed to Optimal Energy by URI Cooperative Extension	Subtotal
2021	\$0.00	\$0.00	\$0.00
2022	\$11,055.00	\$3,000.00	\$14,055.00
2023	\$14,125.00	\$3,000.00	\$17,125.00
Total	\$25,180.00	\$6,000.00	\$31,180.00

PUC 1-7

Request:

Referencing the Joint Pre-Filed Testimony of Samuel Ross and Craig Johnson filed on October 30, 2023 (Joint Testimony), please explain what the additional \$36,694.23 included in the proposed C-Team budget is for.

Response:

On July 28, 2022, the EERMC approved its proposed budget for 2023 which included an allocation of \$717,025.00 for its C-Team. On November 23, 2022, the Council filed a revision to its proposed budget for 2023 with the Commission in Docket 22-33-EE. The Council's allocation for its C-Team remained at \$717,025.00 in the revised budget proposal for 2023. At its Open Meeting on December 20, 2022, the Commission approved the Council's revised budget proposal for 2023, subject to the statutory cap contains in R.I. Gen. 39-2-1.2. This was later reflected in the Commissions' Report and Order in Docket 22-33-EE. During the course of the proceedings in Docket 22-33-EE, it was determined that the Council's proposed budget would in fact exceed the statutory cap contained in R.I. Gen. 39-2-1.2 by \$105,148.40. At its February 16, 2023 meeting, the Council voted to reduce its budget to be in line with the statutory cap. As part of this vote, the Council voted to reduce its budget for consultant services by \$36,694.23 from \$717,025.00 to \$680,330.77.

The additional \$36,694.23 included in the Council's proposed budget for consultant services for 2024 is simply restoring that portion of the budget that was reduced to ensure the Council's budget did not exceed the statutory cap. In other words, the Council's starting place for its proposed consultant services budget in 2024 was equal to its approved consultant services budget in 2023 (\$717,025.00) prior to the necessary reduction described above.

PUC 1-8

Request:

Referencing the Joint Testimony, Exhibit 9 includes a slide stating that the C-Team expects to “coordinate with OER to draft and issue RFP, evaluate proposals, and onboard a (potentially new) program administrator” and proposes a budget of \$100,000 for these activities. Please provide an explanation of how the EERMC arrived at the \$100,000 proposed budget. Please also provide an estimate of how much the C-Team expects to bill for each of the three categories of tasks, and a breakdown of any expenses incurred or expected to be incurred in 2023.

Response:

Explanation of Budget

The proposed value of \$100,000 for this work was an estimate informed by a combination of professional judgement from the C-Team, iterative review by the Council, and the Council's understanding of the nature and of the Council's anticipated involvement in the overall RFP process, pursuant to its statutory obligation to be 'in consultation' with OER. The C-Team provided a conservative (i.e. low) estimate relative to its experience conducting similar work supporting other clients in the process of procuring energy efficiency implementation services. In addition, as the issuance of an RFP for Energy Efficiency Implementation Services in Rhode Island is a new process for the state, this work area is subject to some uncertainty with respect to actual level of effort and time required, which is reflected in the 'round' nature of the \$100,000 estimate.

Expected Billing in Each Category

Because this task is new for Rhode Island, and involves many stakeholders, it is difficult to estimate a breakout of anticipated billing across the three categories of tasks, and the budget was not developed in a 'task-by-task' bottom-up manner. It is also worth noting that the categories “draft and issue RFP, evaluate proposals, and onboard a (potentially new) program administrator” were intended as illustrative examples of the type of work involved in efficiency implementation procurement support, not as an exhaustive list of all types of work that could be involved (some examples of additional work areas that are anticipated to potentially occur are included below). Rather, it was estimated as a substantial reduction from a total budget range that would typically be needed for this type of work. That said, it is the C-Team's understanding based on progress to date in this overall process that 2024 will likely have relatively limited billing associated with drafting and issuing the RFP, as much of that work is anticipated to be complete by the end of 2023. The breakout of time spent between proposal evaluation and onboarding support (and other work areas) may vary significantly depending on many factors that are currently unknown. Some examples of uncertainties in the process include: the number

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of responses received; the nature of the review process (e.g. whether respondents will be interviewed); the degree, length, and nature of review of a proposed vendor’s candidacy by various state agencies; the outcome of that process, including whether a new vendor or the incumbent is selected; the length of any contract negotiation and execution processes; and the amount of time that consequently remains in 2024 to begin onboarding in the event a new vendor is selected. Because of the manner in which this budget was estimated and the process uncertainty stemming from factors not within the Council’s direct control, there is no expected breakdown of billing for 2024 among various tasks within this overall work area associated with the RFP.

Summary of Billing to Date

Optimal Energy and its partners bill time associated with this RFP process under tasks within its SOW that encompassed a range of work streams beyond its support in reviewing the RFP. As a result, some of the C-Team’s invoice entries where this work appears may include work that was not related to support provided in the development of the RFP. In responding to this request, the C-Team reviewed its billed work year-to-date and identified all entries that included work related to support of this RFP. The C-Team then estimated the share of hours in 25% increments (i.e. 25%, 50%, 75%, or 100%) associated with support of this RFP. The C-Team then rounded the estimated hours to the nearest quarter-hour increment to reflect its billing practices. Finally, the C-Team applied each staff’s billing rate to the estimated hours to arrive at an estimated billing amount associated with support of this RFP. The result of this review is presented in Table 8.

For work through the end of the year, the C-Team estimates an additional 8 hours and \$1,596.00. This estimate is based on the C-Team’s expected additional work in reviewing draft RFP materials.

Our total estimate for work related to supporting this RFP, inclusive of estimated work through the end of the year, is 57.75 hours and \$11,584.75.

Table 8

Date	Staff	Description	Hours	Amount	Estimated Share of Time on EE Implementation RFP	Estimated Share of Hours on EE Implementation RFP	Estimated Share of Amount Billed on EE Implementation RFP
6/7/2023	Ross, Samuel	EE Implementation RFP mtg, prep re: same	0.50	\$103.00	100%	0.50	\$103.00
6/21/2023	Ross, Samuel	review past project materials, prep guiding Qs and considerations for EE Impl RFP process	2.00	\$412.00	100%	2.00	\$412.00

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RIPUC Docket No. 22-35-EE
In Re: 2024 Energy Efficiency Plan and 2024-2026 Three-Year Plan
Responses to the Commission's First Set of Data Requests
Issued November 27, 2023

6/23/2023	Belliveau, Eric	review administrator RFP for OER	1.25	\$275.00	100%	1.25	\$275.00
6/23/2023	Ross, Samuel	prep for, attend meeting with Steve re: EE Admin RFP Disc; follow up review of mtg materials	2.00	\$412.00	75%	1.50	\$309.00
6/27/2023	Ross, Samuel	coord team review and comment consolidation for 3YP and EE Impl RFP	1.00	\$206.00	25%	0.25	\$51.50
6/30/2023	Caesar, Adrian	C-Team Working Session - 2024-2026 EE Plan narrative and program summary comments, initial quantitative analysis of 3YP data; EE Program implementation RFP review	2.00	\$280.00	25%	0.50	\$70.00
7/6/2023	Johnson, Craig	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.	1.00	\$193.00	100%	1.00	\$193.00
7/6/2023	Mosenthal, Philip	Rev. implementation RFP	1.50	\$330.00	100%	1.50	\$330.00
7/7/2023	EFG	Review RI PA RFP SOW	2.00	\$412.00	100%	2.00	\$412.00
7/11/2023	Johnson, Craig	Review EE Implementation RFP - consolidate and review C-Team comments, work on summarizing key takeaways.	1.75	\$337.75	100%	1.75	\$337.75
7/12/2023	Johnson, Craig	Review EE Implementation RFP - finalize review and consolidation of summarizing key takeaways.	2.00	\$386.00	100%	2.00	\$386.00
7/13/2023	Johnson, Craig	Review EE Implementation RFP - Meeting with OER to preview C-	1.00	\$193.00	100%	1.00	\$193.00

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Responses to the Commission's First Set of Data Requests
Issued November 27, 2023

		Team's feedback on our review.					
7/13/2023	Ross, Samuel	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	2.00	\$412.00	50%	1.00	\$206.00
7/21/2023	Johnson, Craig	Final review of first draft of EE Implementation RFP, send comments and key themes to OER.	0.50	\$96.50	100%	0.50	\$96.50
8/1/2023	Johnson, Craig	Check-in meeting with OER on EE Implementation RFP	0.25	\$48.25	100%	0.25	\$48.25
8/10/2023	Johnson, Craig	Review EE Implementation RFP v1.5, working session with Sam to discuss same, and prep for check-in call with OER.	1.00	\$193.00	100%	1.00	\$193.00
8/10/2023	Ross, Samuel	full read through of redlined EE RFP, add'tl comments	3.00	\$618.00	100%	3.00	\$618.00
8/11/2023	Johnson, Craig	Working session with Sam and Steve on EE Implementation RFP.	1.00	\$193.00	100%	1.00	\$193.00
8/11/2023	Ross, Samuel	prep for, meeting with Steve re: EE RFP	1.50	\$309.00	100%	1.50	\$309.00
8/18/2023	Johnson, Craig	Working session with Sam and Steve on EE Implementation RFP.	1.50	\$289.50	100%	1.50	\$289.50
8/18/2023	Ross, Samuel	EE RFP working session with Steve	1.50	\$309.00	100%	1.50	\$309.00
8/25/2023	Ross, Samuel	morning check in; prep for and attend mtg with Steve re: EE Imp RFP	2.25	\$463.50	75%	1.75	\$360.50
9/1/2023	Johnson, Craig	Discussion w/ Sam re: next steps on EE	0.25	\$48.25	100%	0.25	\$48.25

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Rhode Island Energy Efficiency and Resource Management Council
RIPUC Docket No. 22-35-EE
In Re: 2024 Energy Efficiency Plan and 2024-2026 Three-Year Plan
Responses to the Commission’s First Set of Data Requests
Issued November 27, 2023

		Implementation RFP					
9/5/2023	Belliveau, Eric	RI RFP scope review, compare to EVT, review funding path, electrification inclusion, federal funding, TRM and evaluation sections.	1.25	\$275.00	100%	1.25	\$275.00
9/6/2023	Belliveau, Eric	continued review of RFP	0.50	\$110.00	100%	0.50	\$110.00
9/6/2023	Johnson, Craig	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.	1.50	\$289.50	100%	1.50	\$289.50
9/8/2023	Johnson, Craig	Monitor PUC Open Meeting on EE Implementation RFP.	1.00	\$193.00	100%	1.00	\$193.00
9/8/2023	Ross, Samuel	listening in on PUC tech session re: EE RFP	2.00	\$412.00	100%	2.00	\$412.00
9/12/2023	Johnson, Craig	Check-in w/ Sam and Steve on EE Implementation RFP next steps.	0.25	\$48.25	100%	0.25	\$48.25
9/12/2023	Ross, Samuel	prep for, call with OER and Craig re: EE RFP next steps	0.50	\$103.00	100%	0.50	\$103.00
9/22/2023	Johnson, Craig	Check-in call with RIE on updated draft of EE Implementation RFP. Begin reviewing updates.	1.00	\$193.00	100%	1.00	\$193.00
9/22/2023	Ross, Samuel	EE RFP meeting with OER	1.00	\$206.00	100%	1.00	\$206.00
10/3/2023	Caesar, Adrian	EE implementation RFP review and discussion/next steps	0.25	\$35.00	100%	0.25	\$35.00
10/3/2023	Johnson, Craig	Coordinate with Sam on review and next steps of latest iteration of EE Admin RFP.	0.25	\$48.25	100%	0.25	\$48.25
10/4/2023	Johnson, Craig	Review and provide comments on latest draft iteration of EE Implementation RFP.	2.25	\$434.25	100%	2.25	\$434.25

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In Re: 2024 Energy Efficiency Plan and 2024-2026 Three-Year Plan
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Issued November 27, 2023

10/4/2023	Ross, Samuel	Begin to review and add comments to updated EE RFP draft	2.00	\$412.00	100%	2.00	\$412.00
10/5/2023	Caesar, Adrian	EE implementation RFP discussion	0.25	\$35.00	100%	0.25	\$35.00
10/5/2023	Johnson, Craig	EE Implementation RFP - Working session with Sam to review feedback to provide to OER, discussion re: next steps and prep for check-in call with OER tomorrow.	1.25	\$241.25	100%	1.25	\$241.25
10/5/2023	Ross, Samuel	Complete review and add comments to updated EE RFP draft	2.00	\$412.00	100%	2.00	\$412.00
10/6/2023	Johnson, Craig	EE Implementation RFP - Prep for check-in call w/ OER on EE Implementation RFP, call w/ OER to briefly discuss.	0.25	\$48.25	100%	0.25	\$48.25
10/11/2023	Johnson, Craig	Briefing meeting with Councilor Oakley - Discussed upcoming Council agendas, Equity Working Group, and EE Implementation RFP.	1.00	\$193.00	25%	0.25	\$48.25
10/11/2023	Ross, Samuel	call with Chair Oakley re: EE RFP, other topics incl debrief on RIE call prior day; extended call with Acadia center explaining various aspects of EE landscape in RI	2.25	\$463.50	25%	0.50	\$103.00
10/12/2023	Johnson, Craig	Check-in w/ OER on EE Implementation RFP - discussed comments, actions for response, and next steps.	1.25	\$241.25	100%	1.25	\$241.25
10/12/2023	Ross, Samuel	extended call with OER on EE Imp RFP	1.50	\$309.00	100%	1.50	\$309.00

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11/2/2023	Johnson, Craig	Working session with Adrian and Sam - discussed getting together stakeholder group for preparing for federal funds and check-in on status of EE Implementation RFP.	0.50	\$96.50	25%	0.25	\$48.25
Subtotal			56.75	\$11,318.75		49.75	\$9,988.75

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PUC 1-9

Request:

Referencing the Joint Testimony, the EERMC is proposing an energy efficiency and climate awareness campaign with a budget of \$85,000.00. Please explain what this program entails. Please also include an explanation of why this program is needed given other existing marketing efforts, including efforts by the Company and the Office of Energy Resources. Finally, please explain whether this proposal is a one-time program and expense or would be a recurring expense. If it is a recurring expense, please provide an estimate of future expenses after 2024.

Response:

Summary of What Program Entails

For this program, the Council is seeking proposals from qualified offerors to support the Council's responsibility of providing public education and outreach on energy topics. Specifically, the EERMC is seeking an entity to provide strategic marketing consultation, communication planning, and implementation of a public awareness campaign of energy efficiency's foundational role in addressing climate change and achieving the State's clean energy goals. The Council is seeking professional services for strategic consultation and marketing to foster greater public awareness of energy efficiency programming and solutions, and their role in reducing emissions across the state. The selected offeror will be responsible for developing and implementing a communications strategy to reach the public about the importance of energy efficiency improvements in the context of climate change mitigation.

The primary objective of this work is to enable the EERMC to better engage and support Rhode Island ratepayers in making informed energy and environmental choices. The EERMC envisions a multi-phased effort to develop and implement a public awareness campaign with key performance indicators to track success. Phase 1 would encompass tasks related to campaign development, including research and design. Phase 2 would encompass all tasks related to implementation of the campaign. Such efforts could include, but may not be limited to the following:

- Phase 1 – Research & Design
 - Conduct literature review of relevant reports, policy, and resources (e.g., Nonparticipant Market Barriers Study, Act on Climate, etc.)
 - Conduct supplemental research if deemed necessary by the EERMC (e.g., focus groups, surveys, interviews, etc.)
 - Survey and build on existing efficiency and climate related outreach efforts in Rhode Island (e.g., Rhode Island Energy marketing campaigns)
 - Facilitate identification and honing of strategic objectives, target audiences, and key messages

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- Conceptualize and design a public awareness campaign, likely including a variety of outreach elements and platforms such as video, web, social media, in-person events, print media, etc.
- Develop engagement goals along with systems and metrics for measuring and tracking engagement
- Phase 2 – Implementation
 - Implement the public awareness campaign developed in Phase 1
 - Integrate campaign with existing EERMC public outreach events (i.e., EERMC Annual Public Forum and Energy Lecture Series, Energy Expo at the RI Home Show)
 - Utilizing the key performance indicators established in Phase 1, evaluate and report on the reach, impacts, and outcomes of the campaign, including any recommendations for follow-up activities

Why This Program is Needed

One of the EERMC's statutory responsibilities, per R.I. Gen. 42-140.1-3, is to "promote public understanding of energy issues and of ways in which energy efficiency, energy conservation, and energy resource diversification and management can be effectuated." The need to address climate change is an urgent matter and the Council has a responsibility to help Rhode Island ratepayers understand how the rapidly evolving energy landscape impacts their lives and how they can benefit from available programs. Through the Act on Climate, the State has set mandatory and enforceable greenhouse gas emissions reduction targets, and energy efficiency improvements play a significant role in achieving those goals. The Council can help raise public awareness of the programs and services available to help reduce environmental impacts and emissions. In particular, the Council seeks to prioritize support for economically disadvantaged communities, which typically bear a greater burden with regard to the costs and impacts of a fossil fuel-based economy. In addition, energy efficiency is unique among climate mitigation efforts in that many of the solutions it offers include attractive customer economics, and significant societal benefits that accrue in addition to emissions reduction benefits. These features position efficiency as a least-cost solution for Rhode Islanders. Public education about this aspect of efficiency investments has the potential to save Rhode Island residents money relative to alternative strategies to pursue climate mitigation.

Program Recurring and Future Expenses

The Council's proposed budget for this item is currently contemplated as a standalone project and consequently is not considered a recurring expense. It is possible that the Council may wish to conduct follow-up work resulting from the delivery of this project as proposed for 2024. Any such follow-up work would be of a different scope and budget which the Council would include in future proposals beyond 2024.