McElroy & Donaldson

Michael R. McElroy
Leah J. Donaldson

Members of the Rhode Island and Massachusetts Bars

Attorneys at Law

21 Dryden Lane
Post Office Box 6721
Providence, RI 02940-6721

Michael@McElroyLawOffice.com
Leah@McElroyLawOffice.com

(401) 351-4100
fax (401) 421-5696

February 10, 2020

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

Re: Block Island Utility District – Demand Side Management Plan

Dear Luly:

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

Enclosed for filing in this matter are an original and nine copies of the following:

1. BIUD's Proposed Demand Side Management 2020 Plan.
2. Supporting Testimony of Jeffery M. Wright, President of BIUD.
3. Resume of Jeffery M. Wright, President.
4. Resume of Nathan Cleveland of the Office of Energy Resources, who prepared the Demand Side Management Plan and will be prepared to testify and answer any questions regarding the Plan.

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

Very truly yours,

Michael R. McElroy

MRMc/tmg

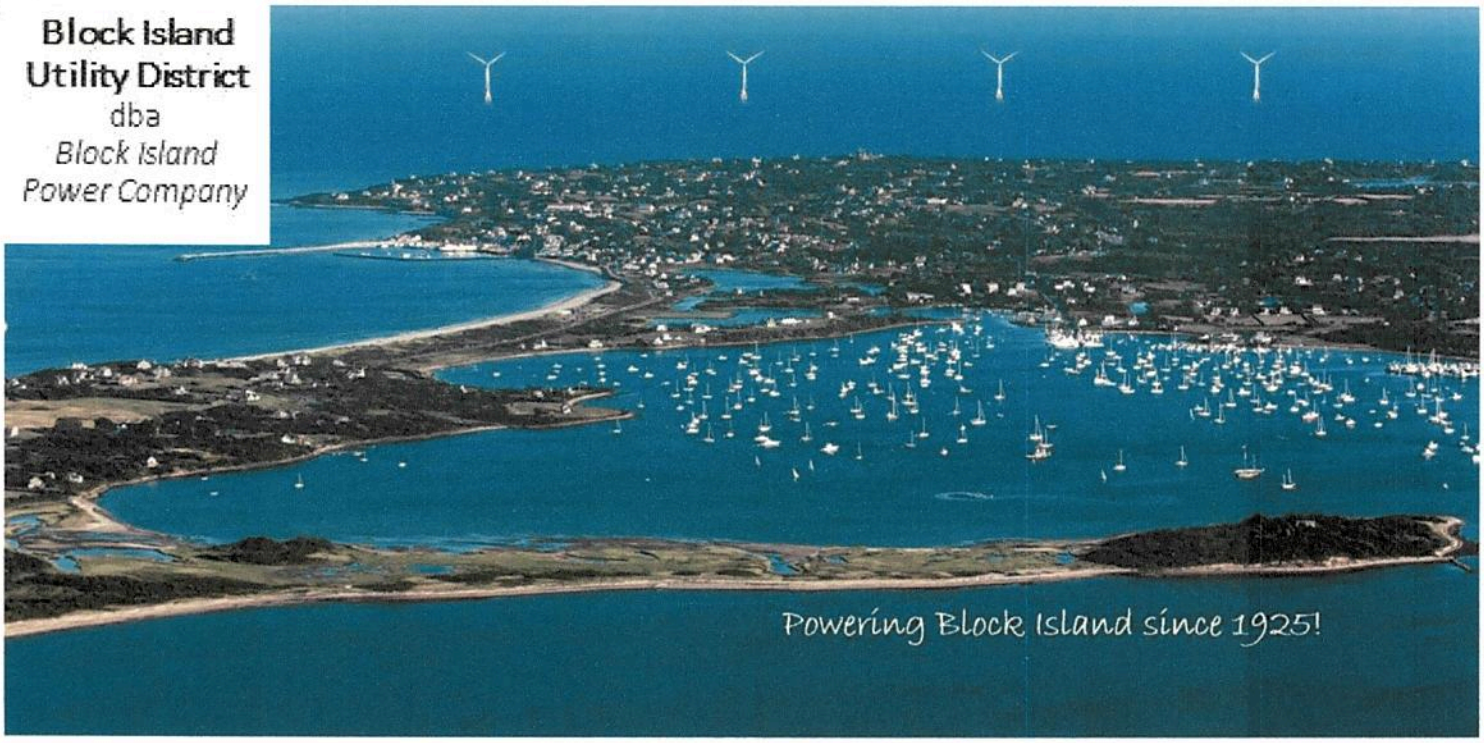
cc: Service List Docket No. 4975

Docket No. 4975 – Block Island Utility District – Rate Change Application
Service List as of 12/26/2019

Name/Address	Email	Phone
Block Island Utility District (BIUD) Michael McElroy, Esq. Leah J. Donaldson, Esq. Schacht & McElroy PO Box 6721 Providence RI 02940-6721	Michael@McElroyLawOffice.com; leah@mcelroylawoffice.com;	401-351-4100
David Bebyn	dbebyn@beconsulting.biz;	
Richard LaCapra	Rlacapra@lacapra.com;	212-675-8123
Jeffery Wright, President Barbara MacMullan Everett Shorey	jwright@blockislandutilitydistrict.com; bamacmullan@gmail.com; eshorey@shoreyconsulting.com;	401-466-5851
Division of Public Utilities (Division) Christy Hetherington, Esq. Dept. of Attorney General 150 South Main St. Providence, RI 02903	CHetherington@riag.ri.gov; MFolcarelli@riag.ri.gov; dmacrae@riag.ri.gov;	401-274-4400 Ext. 2425
John Bell, Chief Accountant	John.bell@dpuc.ri.gov; Al.contente@dpuc.ri.gov; Pat.smith@dpuc.ri.gov;	
Ralph Smith, Larkin Associates	rsmithla@aol.com; dawn.bisdorf@gmail.com; msdady@gmail.com; mcranston29@gmail.com;	
File an original & nine (9) copies w/: Luly E. Massaro, Commission Clerk Cynthia Wilson Frias, Counsel Public Utilities Commission 89 Jefferson Blvd. Warwick, RI 02888	Luly.massaro@puc.ri.gov; Cynthia.WilsonFrias@puc.ri.gov; Margaret.hogan@puc.ri.gov; Alan.nault@puc.ri.gov; Todd.bianco@puc.ri.gov;	401-780-2107
Interested Persons		
Nick Ucci, OER	Nicholas.Ucci@energy.ri.gov; Carrie.Gill@energy.ri.gov; Nathan.Cleveland@energy.ri.gov; Becca.Trietch@energy.ri.gov;	401-574-9104
Andrew Marcaccio, Esq., OER	Andrew.Marcaccio@doa.ri.gov;	401-222-8880
Kathleen Merolla, Esq. James Kern, Interim Town Manager Town of New Shoreham	KAMLAW2344@aol.com; townmanager1@new-shoreham.com; townclerk@new-shoreham.com; Jkern@new-shoreham.com;	

Robert L. Roberge, Town Manager Shirlyn Gobern Town of New Shoreham	eroberge@new-shoreham.com; Townmanager@new-shoreham.com;	
Jennifer Hutchinson, Esq. National Grid Joanne Scanlon	jennifer.hutchinson@nationalgrid.com; Joanne.Scanlon@nationalgrid.com;	

Block Island
Utility District
dba
Block Island
Power Company



Demand Side Management

2020 Plan

Docket #:

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

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Block Island Utility District – 2020 Demand Side Management Plan

1. Introduction and Background

Demand side management (DSM) is important because it can provide benefits to both customers as well as the electric grid. The Block Island Utility District (BIUD, the District) is proposing to establish a DSM program to provide it's 1,900 customers access to energy efficiency programs that will benefit them and improve the service and reliability of the island's electric grid. A DSM program provides access and incentives for measures that allow customers to optimize their energy usage and reduce their utility bills. Reducing energy usage, particularly during peak seasons or times of day, can also have substantial benefits such as reduced grid maintenance and capital expenditures, reduced peak charges for customers, and greater service reliability.

Block Island is a unique community because of its geographic separation from the mainland and its variable, tourist-driven seasonal usage profile. The community of New Shoreham and the grid that serves it needs to be flexible enough to handle the increased summer population, as well as reliable and resilient enough to provide service to the year-round residents and businesses, even in the face of harsh winter conditions.

Given Block Island's unique size, location, and seasonal usage spike, demand management is especially important for this community and aligns with many of BIUD's goals outlined in the proposed rate case filing (Docket #4975). Specifically, through the implementation of this proposed DSM plan, BIUD aims to empower its customers to make choices that help control their energy usage, reduce energy burden[1] on customers, improve resource allocation, and encourage the adoption of innovative new technologies that maximize the benefits of Block Island's smart meters. By supporting the filing of this proposed DSM plan, the BIUD Board seeks to deliver energy efficiency program benefits to all BIUD customers.

The proposed 2020 DSM plan for the Block Island Utility District represents an evolution of prior energy efficiency work conducted in New Shoreham through the *Block Island Saves* pilot program. The *Block Island Saves* program ran from 2015-2017 and was administered and funded solely by the Rhode Island Office of Energy Resources. The BIUD, working in collaboration with the Office of Energy Resources (OER), drafted this proposed DSM plan as a robust iteration on the original *Block Island Saves* pilot. The DSM programs described below leverage best practices from the *Block Island Saves* program as well as Rhode Island's nation-leading mainland efficiency programming and are intended to address the unique needs of the Block Island community.

The original *Block Island Saves* program began as a pre-pilot program with the support of the New Shoreham Town Council, fully managed and funded through OER. The pre-pilot was

[1] Energy burden is the percentage of household income spent on home energy bills.

conducted to test energy efficiency programs on Block Island and recruit a small group of pre-pilot participants. Of the 24 pre-pilot applications received, ten residents and five businesses were selected to participate in the pre-pilot (those not selected were later able to participate in the full pilot).

Pre-pilot participants received a free energy assessment of their home or business, followed by a list of recommendations for energy efficiency improvements and access to associated rebates or incentives. Overall, the pre-pilot program incentives and rebates were evaluated by OER to be cost-effective and successful in motivating participants to install energy-efficient measures. The success of the pre-pilot in terms of participation, interest, opportunities, and cost-effectiveness prompted the expansion of the pre-pilot program to a full-scale pilot.

Program offerings in the full pilot were identical to the pre-pilot phase. During the full-pilot phase, 110 additional home and business energy assessments were conducted. Program participants were able to save 313 MWh of electricity, 271 MMBtu of oil, and 136 MMBtu of propane annually. Participants were also able to decrease their energy bills, saving in aggregate $597,968 (residential) and $714,396 (business) over the lifetime of the efficiency upgrades.

Following the completion of *Block Island Saves*, OER conveyed lessons learned to both the BIUD Utility and the public through a report which is available on the OER website[2]. This proposed 2020 DSM plan incorporates recommendations from OER's report and continues several elements from the successful *Block Island Saves* program, such as the no-cost assessments with direct install measures and incentives for weatherization. Based on the interest and adoption of those measures during the pilot the following proposed DSM programs include those same elements as a foundation for 2020. The proposed plan also seeks to prepare New Shoreham residents for the changing energy landscape by promoting the installation of newer, highly efficient heat pump equipment, programmable thermostats, and weatherization measures.

A significant difference between the proposed 2020 plan and the pilot is the expansion and enhancement of the HVAC and water heating programs. The proposed DSM plan includes an incentive for the adoption of high-efficiency heat pump systems as well as heat pump water heaters. In combination with the newly proposed rate structure (described below in section 2.B), the District feels that the adoption of heat pumps for heating and cooling needs will be an attractive option for customers that provides significant energy and cost savings.

Heat pump technology is an important tool in helping BIUD smooth out the current load curve, minimize increasing summer demand caused by a growing number of air conditioning installations, and can provide opportunities for customers to reduce their overall energy burden. In addition to aligning with the District's goals for its customers, offering incentives for heat pumps can also help Rhode Island to meet its Greenhouse Gas Emission goals while ensuring that New Shoreham residents and businesses receive the same, if not enhanced, opportunities for improved comfort and energy savings as other Rhode Islanders.

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[2] http://www.energy.ri.gov/documents/archived-reports/Block%20Island%20Saves%20Pilot%20-%20Full%20Report%20-%20April%202018.pdf

Block Island Utility District respectfully requests that the Public Utilities Commission (PUC) approve this 2020 Demand Side Management plan and its associated use of ratepayer funds, in its entirety, as outlined below.

2. DSM Categories, Proposed Budget Allocation, Cost Recovery, and Estimated Benefits

The proposed budget for the Block Island DSM programs is broken into three major categories – Assessment and Installation, Inspection and Program Administration, and Customer Outreach.

In the Assessments & Installation category, there are programs for Residential energy assessments and weatherization; Residential HVAC and water heating; Business energy assessments, lighting, and weatherization; and Business HVAC and water heating. The distinction between Residential and Business programs will allow BIUD to track the distribution of costs and benefits within and between the two distinct customer segments. This budget category, overall, contains the full costs of energy assessments at homes and businesses, including the direct installation of measures such as LED lightbulbs, smart power strips, and low-flow showerheads, as well as rebates for additional measures such as weatherization and efficient HVAC equipment. As a result, the bulk of the proposed DSM budget exists within this category.

The Inspection and Program Administration category includes the cost of inspections for any residential weatherization and/or HVAC measures installed through the DSM programs, as well as any business direct install measures, weatherization, or other energy efficiency measures installed through the programs. It is important to verify the proper installation of deeper measures so customers will reap the full benefits of the measure. Further, to support insightful reporting to the Public Utilities Commission, inspection and verification is expected to enhance the accuracy of energy savings calculations, in addition to ensuring customer satisfaction and realization of expected energy savings. Since the District is re-establishing efficiency programming with this proposed DSM plan, start-up costs are perhaps higher than they may be in subsequent years. Coupled with the high cost of travel to/from Block Island, this has led to increased costs in this budget category relative to more mature DSM programs or more readily accessible areas. The District is committed to working with vendors and other partners to find ways to drive these costs down as much as is feasible in future program years, through more efficiency program delivery, engaging more local service providers, or other ways that may present themselves as the programs mature.

Funds for the efficiency consultant BIUD proposes to hire are also encompassed in the Inspection and Program Administration budget category. The efficiency consultant will assist the District in administering the DSM programs, managing the tracking and reporting of data, processing incentive rebates, and making suggestions for future program development. Additionally, the efficiency consultant will assist the District in developing a cost-effectiveness framework and evaluating program performance, consistent with Docket # 4600 principles and directives.

Lastly, the Customer Outreach budget category covers the costs of promoting the DSM programs. The proposed spending on program outreach will encourage BIUD customers to participate in the DSM programs, and will inform them on, how to participate and what benefits can be expected.

Using the *Block Island Saves* results, the average BIUD customer saved 2.84 MWh of electricity, 2.46 MMBtu of oil, and 1.24 MMBtu of propane annually through that program. Based on the estimated participation numbers for the proposed 2020 DSM plan, the District estimates that this plan could deliver approximate annual savings of 115 MWh of electricity, 100 MMBtu of oil, and 50 MMBtu of propane. Actual savings numbers depend on the exact measures installed by customers and the specific fuel types they utilize, among other factors, but this provides some scope as to the significant energy benefits BIUD customers can realize through this plan.

A. Proposed 2020 Budget Allocations

The budget numbers included below are based on actual project costs and participation levels from the *Block Island Saves* pilot program. Adjustments to those numbers are based on anticipated participation numbers and changes in unit costs since 2017 when the pilot concluded.

Table 2.1 Proposed 2020 DSM Plan Budget Allocations		
Budget Category	**Proposed Budget**	**Notes**
Assessment & Installation		
Residential Assessments and Weatherization	$45,350.00	Energy Assessments & Weatherization
Residential HVAC & Water Heating	$7,700.00	Programmable Thermostats; Heat Pump Water Heaters; Heat Pump Heating & Cooling Systems; Weatherization Bonus
Business Assessments, Lighting, and Weatherization	$27,600.00	Energy Assessments, Lighting Measures, and Weatherization
Business HVAC & Water Heating	$5,000.00	Programmable Thermostats; Heat Pump Water Heaters; Heat Pump Heating & Cooling Systems
Total	**$85,550.00**	
Inspection and Program Administration		
Inspection Services		Inspections for Residential Weatherization; Business Direct Install measures, Lighting, and Weatherization
Program Administration		Efficiency Consultant Services
Total	**$29,200.00**	
Customer Outreach		
Total	**$5,250.00**	Advertising in Local Publications, Bill Inserts, Online, and in Community Bulletin
Total Budget	**$120,000.00**	

B. Cost Recovery and Other Funding Sources

Block Island Utility District, through its new rate case in Docket # 4975, has proposed a new rate design with implications for the demand side management plan and its budget. The current rate structure is a two-tier structure with peak and off-peak seasonal rates for all customer classes. In its proposed rate case, BIUD has suggested implementing a three-tier rate structure with peak, shoulder, and off-peak rates for all customer classes as well as an efficiency surcharge.

Table 2.2 - Current Block Island Utility District Rate Structure											
OFF-PEAK					PEAK				OFF-PEAK		
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC

Table 2.3 - Proposed Block Island Utility District Rate Structure											
OFF-PEAK				SHOULDER		PEAK		SHOULDER		OFF-PEAK	
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
				$.00395/kWh		$.01/kWh		$.00395/kWh			
				EFFICIENCY SURCHARGE							

Through the proposed rate redesign, BIUD estimates it will generate approximate revenues of $60,000 from the efficiency surcharge during the calendar year, which will support DSM program implementation in 2020. The breakdown of efficiency surcharge collection was provided in Docket # 4975 and estimates collections as follows: ~$24,000 from residential customers, ~$6,000 from business customers, and ~$30,000 from the general service rate, which comprises larger residential users as well as some business customers. The Office of Energy Resources will supplement the budget for the DSM programs with Regional Greenhouse Gas Initiative (RGGI) proceeds. OER has committed a total of $180,000 in RGGI proceeds to be provided over the course of three years, beginning in 2020, to help support BIUD's DSM programming in conjunction with annual, collected efficiency surcharge monies.

3. Detailed Program Descriptions

A. Residential Offerings:

Refer to Table 2.1 for full program budget; residential subsection reproduced below.

Table 3.1 – Assessment and Installation Category – Residential Programs		
Program	**Proposed Budget**	**Estimated Quantities & Notes**
Residential Assessments and Weatherization	$45,350.00	36 Energy Assessments & 8 Weatherization
Residential HVAC	$7,700.00	36 Programmable Thermostats; 6 Heat Pump Water Heaters; 6 Heat Pump Heating & Cooling Systems; 2 Weatherization Bonus

i. Home Energy Assessments

Residential energy assessments with no-cost direct install measures are critical for households to reduce energy use, lower their energy costs, and identify opportunities for additional, deeper savings. The home energy assessment is a focal point of the proposed DSM plan as it allows for

the comprehensive evaluation of the residential building stock, direct installation of energy saving measures (e.g. LED light bulbs, smart power strips) and the opportunity to identify deeper savings opportunities such as weatherization or HVAC equipment upgrades. Assessments often serve as the initial contact point for customers and what the District hopes is the start of an ongoing, beneficial relationship with the customer as they become more aware of their energy use and seek to make continual energy improvements to their home.

Each home energy assessment, conducted by a BPI certified energy assessor, will include a whole-home evaluation, a blower door test to check for proper air sealing, a heating system safety test to check the health and safety of the equipment, and a number of direct install measures (outlined in the following section) that the assessor will install during the visit. At the conclusion of the assessment, the customer will receive a home energy action plan outlining additional energy savings measures they can implement, the estimated costs, and BIUD incentives associated with those measures, as well as information and tips on how to better manage their energy use and reduce costs. These comprehensive assessments are provided to the customer free of charge and are open to all residential BIUD customers.

ii. Direct Install Measures

As part of the Home Energy Assessments, each energy assessor will install a number of energy saving measures in each home, as needed, at no cost to the customer. The proposed 2020 DSM plan proposes the following direct install measures:

Table 3.2 – Proposed Direct Install Measures and Incentives

Measure	**Estimated Quantities**	**Incentive Level**	**Notes**
LED Lightbulbs	432	Free	No limit; expect 12 per assessment
Smart Power Strips	72	Free	Maximum of 2 per assessment
Low-Flow Shower Heads	36	Free	Expect 1 per assessment
Aerator faucets	50	Free	Expect 1.5 per assessment

LED Lightbulbs – installed in place of existing incandescent or CFL bulbs throughout the home, any number of bulbs can be replaced during the assessment.

Smart Power Strips – up to two (2) smart power strips that help reduce electricity usage of devices that would otherwise be constantly using electricity.

Faucets and Showerheads – Low-flow showerheads and aerator faucets that help reduce water and energy usage, any number can be installed throughout the home during the assessment.

These low-cost measures are proven energy saving devices that provide immediate benefits to customers who have a home energy assessment completed.

iii. Weatherization Measures

One of the outcomes BIUD expects to achieve with its proposed DSM program is to educate customers about the benefits of weatherization and to properly incentivize them to undertake these measures. Residential customers with weatherization opportunities will learn of these opportunities through the home energy action plan provided at the conclusion of the assessment, as well as given information about potential costs and incentive levels that BIUD offers.

Weatherization benefits include increased comfort to occupants year-round - warmer in the winter and cooler in the summer - as well as reduced energy usage and costs. Many homeowners deal with high energy bills year-round without realizing that proper weatherization techniques can meaningfully reduce their bills. The proposed DSM plan offers the following options as part of the weatherization program:

Table 3.3 – Proposed Weatherization Measures and Incentive Levels

Measure	**Incentive Level**	**Notes**
Air Sealing	Up to 10 labor hours free ($800 value) plus 40% off further sealing, up to $2,000 in total weatherization costs	Based on pilot rebate levels and expected home energy assessment numbers
Duct Sealing		
Insulation		
Pipe Insulation		
Weatherization Bonus	$250	For customers who insulate and install a heat pump system

Air Sealing – Sealing air leaks in and around windows and doors to reduce the loss of heated or conditioned air.

Duct Sealing – Sealing of leaks around ductwork to ensure that all heated or conditioned air enters the living spaces and is not lost in the walls/ceilings or to the outside.

Pipe Insulation – Improving insulation around water pipes to reduce heat loss and protect against pipe freezing during the winter months.

Insulation – Installing improved insulation in the walls, ceilings, and floors of the home to improve the building envelope, leading to increased comfort as heated or conditioned air remains in the home rather than escaping outside.

An additional feature for residential customers is a weatherization bonus. Customers can receive an additional $250 rebate if they bundle insulation work alongside the installation of a heat pump heating and cooling system. BIUD is proposing to offer this bonus incentive because of the benefits that come from weatherizing a home properly, especially in conjunction with efficient operation of a heat pump system.

iv. HVAC Measures

The home energy action plan will also provide information to customers about opportunities to upgrade inefficient heating and cooling equipment in the home. The HVAC offerings aim to promote the adoption of high-efficiency heat pump systems for heating and cooling as well as heat pump water heaters. Electrifying heating and cooling is an important step in reducing greenhouse gas emissions and is supported by the District's recently proposed three-tier rate structure, which includes a lower winter electricity price that makes the adoption of electric heating measures more cost effective for customers. Additionally, the adoption of programmable thermostats gives residents the ability to better control and monitor their energy usage and save money.

It is proposed that incentives for the following equipment, at the following levels, be offered as part of the Residential HVAC program:

Table 3.4 – Proposed HVAC and Water Heater Measures and Incentives				
Equipment	**Rating**	**Estimated Quantity**	**Proposed Rebate**	**Notes**
Central Heat Pump	**SEER** ≥15; **HSPF** ≥9	2	$250 per ton	Seasonal Energy Efficiency Rating (SEER) measures air conditioning and heat pump cooling efficiency. A SEER rating is a maximum efficiency rating, similar to the miles per gallon for a car. Heating Seasonal Performance Factor (HSPF) is used to measure the efficiency of heat pumps and the higher the HSPF the more efficient the system.
Ducted or Mixed Ducted Mini-Split Heat Pump	**SEER** ≥15; **HSPF** ≥9	2	$250 per ton	
Ductless Mini-Split Heat Pump	**SEER** ≥15; **HSPF** ≥10	2	$150 per ton	
Heat Pump Water Heaters	ENERGY STAR ≤ 55 gallon; should have a minimum UEF of 2.00	4	$300 rebate	Uniform Energy Factor (UEF) is a new metric for determining the energy efficiency of a water heater utilized by the Department of Energy. The higher the UEF, the greater the equipment's efficiency and the lower the energy bill.
	ENERGY STAR >55 gallon should have a minimum UEF of 2.70	2	$150 rebate	Uniform Energy Factor (UEF) is a new metric for determining the energy efficiency of a water heater utilized by the Department of Energy. The higher the UEF, the greater the equipment's efficiency and the lower the energy bill.
Programmable Thermostats		36	$25 Rebate	
*Rebate not to exceed $750 per customer for this program (excluding thermostats).				

Block Island Utility District wants to promote the adoption of high-efficiency electric heat pumps through an incentive structure that will be based on a per-ton amount. This structure is more flexible than a flat rate amount and allows the incentive to vary appropriately with the proper sizing of heat pump systems to various home configurations and sizes. Additionally, if the newly proposed three-tier rate structure with lower winter electric rates is approved by the Commission, BIUD anticipates that the combined new rate structure and DSM incentives will drive adoption of heat pump technologies which will save customers energy and money.

Qualifying units must meet the SEER and/or HSPF ratings specified for each system type, which align with the efficiency ratings contained in the Northeast Energy Efficiency Partnerships (NEEP) cold climate heat pump specification list and is considered the industry standard for this technology.

Alongside the incentive for heat pump based heating and cooling systems, the District also proposes incentives for heat pump water heaters. Given the smaller variation in equipment size, associated energy savings expected, and to align closely with other Rhode Island efficiency programs, BIUD will be offering flat rate incentives of $300 and $150 for heat pump water heaters, based on size. Units 55 gallons and smaller use less energy than larger units and thus provide a greater opportunity for energy savings. Therefore, BIUD proposes to provide a higher incentive for these units compared to units over 55 gallons in size. Qualifying units will have a minimum uniform energy factor (UEF) of 2.0 for the smaller units and a minimum UEF of 2.7 for the larger systems. ENERGY STAR heat pump water heaters can save the average household $330 per year and 2,690 kwh compared to a standard electric hot water heater, so these unites represent a great opportunity for savings.

Because heat pump technology is still new and because the pilot program on Block Island did not include heating and cooling heat pump systems as part of the incentive structure, the District is proposing to cap the incentive level at $750 per customer for these measures initially. BIUD wants to strike a balance between providing a reasonable incentive to drive adoption of this technology alongside the ability to provide some incentive to a larger number of customers who may be interested in taking advantage of this opportunity. Because there is not reliable historical data from the pilot program for these measures, setting a cap will help the District to serve both of these goals.

The District will also incentivize programmable thermostats through the residential HVAC and water heater program. Programmable thermostats are a useful piece of technology to help manage a home's energy usage efficiently and conveniently. BIUD is proposing a $25 rebate to customers who purchase a programmable thermostat.

Customers who install weatherization or HVAC measures will be given their rebate after work has been completed and inspected. BIUD will offer rebate forms to customers both online and in person at the BIUD office and will require customers to provide proper documentation from the contractor who performed the job, in the form of a receipt or work order. Customers submitting rebates for eligible thermostats need only provide a purchase receipt as proper documentation with their rebate form. If a customer has any problems or questions regarding a rebate form, their contractor may be able to help complete relevant fields, and customers can always reach out to BIUD staff for assistance during business hours.

B. Business Offerings:

Refer to Table 2.1 for full program budget; business subsection reproduced below.

Table 3.5 – Assessment and Installation – Business Budgets		
Program	**Proposed Budget**	**Notes**
Business Assessments, Lighting, and Weatherization	$27,600.00	Energy Assessments, Additional Lighting Measures, and Weatherization
Business HVAC & Water Heating	$5,000.00	Programmable Thermostats; Heat Pump Water Heaters; Heat Pump Heating & Cooling Systems

i. Business Energy Assessments

As with the residential offerings, the initial no-cost energy assessment for business and commercial customers is a foundational focus of the proposed business DSM programs. Comprehensive evaluations of the commercial spaces of New Shoreham will be conducted by a qualified energy assessor who will also directly install measures that provide immediate savings and deliver a comprehensive energy action plan to the customer with recommendations for additional savings measures. Providing these free, no-obligation energy assessments also allows BIUD to establish an ongoing relationship with business customers as they pursue energy efficiency improvements.

Each business energy assessment, conducted by an energy assessor, will include a whole-business evaluation of the electrical equipment and thermal systems as well as directly installing screw-in LED lightbulbs, as appropriate. At the conclusion of the assessment, the customer will receive a business energy action plan outlining additional energy savings measures they can implement, the estimated costs, and BIUD incentives or rebates associated with those measures, as well as information and tips on how to better manage their energy use and reduce costs. These comprehensive assessments are provided to the customer free of charge and are open to all BIUD business customers.

Because the number of business participants in the *Block Island Saves* pilot was small, and the business community on the Island is limited, it makes accurately estimating demand for specific measures more challenging than the residential program. The District is estimating six business assessments will be conducted in the initial program year and that from those assessments' customers will pursue some additional deeper efficiency measures, be that additional lighting, weatherization, or HVAC upgrades. The District has set a budget that anticipates that half of the business customers will pursue additional measures of some kind.

ii. Direct Install and Other Lighting Measures

Table 3.6 – Proposed Business Direct Install and Other Lighting Measures and Incentives			
Measure	**Estimated Quantities**	**Incentive Level**	**Notes**
Screw-in LED Lightbulbs	60	Free	No limit; expect 10 per assessment
LED fixture upgrades	12	75% of costs covered	Expect an average of 2 per assessment
Lighting controls	6		Expect an average of 1 per assessment
Occupancy sensors	12		Expect an average of 2 per assessment

As part of the business energy assessments, each energy assessor will install screw-in LED lightbulbs in as many fixtures as needed throughout the property. BIUD recognizes that many business environments have different lighting needs from residential customers, and screw-in LED lightbulbs may not upgrade the entirety of the lighting for a given business, and therefore it is proposed that incentives for additional lighting measures be offered as well. Upgraded fixtures, lighting controls, and lighting sensors (such as occupancy sensors) will be listed on the energy action plan as an additional energy saving measure that customers can pursue, and approved equipment will be incentivized at 75% of total cost.

iii. Weatherization Measures

One of the outcomes BIUD expects to achieve with its proposed DSM plan is to educate customers about the benefits of weatherization and to properly incentivize them to undertake these measures. Business customers with weatherization opportunities will learn of these opportunities through the energy action plan provided at the conclusion of the energy assessment.

Weatherization benefits include increased comfort to occupants year-round - warmer in the winter and cooler in the summer - as well as reduced energy usage and costs. Many business owners deal with high energy bills year-round without realizing that proper weatherization techniques can meaningfully reduce their bills. The proposed DSM plan offers the following options as part of the business weatherization program:

Table 3.7 – Proposed Business Weatherization Measures and Incentive Levels		
Measure	**Incentive Level**	**Notes**
Air Sealing	Up to $1,200 in free air sealing plus 40% off further sealing, up to $4,200 in total weatherization costs or up to $3,000 in insulation costs	Based on prior rebate levels and expected business energy assessment numbers
Duct Sealing		
Insulation		
Pipe Insulation		

Air Sealing – Sealing air leaks in and around windows and doors to reduce the loss of heated or conditioned air to the outside.

Duct Sealing – Sealing leaks around ductwork to ensure that all heated or conditioned air enters the living spaces and is not lost in the walls/ceilings or outside.

Pipe Insulation – Improving insulation around water pipes to reduce heat loss and protect against pipe freezing during the winter months.

Insulation – Installing improved insulation in the walls, ceilings, and floors of the home to improve the building envelope, leading to increased comfort as heated or conditioned air remains in the home rather than escaping outside.

iv. Business HVAC Measures

Business customers have more varied building uses and often utilize larger equipment to support their operations. In order to ensure that the business customers of BIUD have opportunities to upgrade to more efficient equipment where appropriate, incentives for the following measures are proposed:

Table 3.8 – Proposed Business HVAC and Water Heater Measures and Incentives			
Equipment	**Rating**	**Proposed Rebate**	**Notes**
Central Heat Pump	**SEER** ≥15; **HSPF** ≥9	$250 per ton	Seasonal Energy Efficiency Rating (SEER) measures air conditioning and heat pump cooling efficiency. A SEER rating is a maximum efficiency rating, similar to the miles per gallon for a car. Heating Seasonal Performance Factor (HSPF) is used to measure the efficiency of heat pumps and the higher the HSPF the more efficient the system.
Ducted or Mixed Ducted Mini-Split Heat Pump	**SEER** ≥15; **HSPF** ≥9	$250 per ton	
Ductless Mini-Split Heat Pump	**SEER** ≥15; **HSPF** ≥10	$150 per ton	
Heat Pump Water Heaters	ENERGY STAR ≤ 55 gallon; should have a minimum UEF of 2.00	$300 rebate	Uniform Energy Factor (UEF) is a new metric for determining the energy efficiency of a water heater utilized by the Department of Energy. The higher the UEF, the greater the equipment's efficiency and the lower the energy bill.
	ENERGY STAR >55 gallon should have a minimum UEF of 2.70	$150 rebate	Uniform Energy Factor (UEF) is a new metric for determining the energy efficiency of a water heater utilized by the Department of Energy. The higher the UEF, the greater the equipment's efficiency and the lower the energy bill.
Programmable Thermostats		$25 Rebate	
*Rebate not to exceed $1000 per customer for this program (excluding thermostats).			

Programmable Thermostats – programmable thermostats allow for better control of, and reduced operating costs from, heating and cooling systems. Therefore, programmable thermostats help manage a business's energy usage efficiently and conveniently. BIUD is proposing a $25 rebate to customers who purchase a programmable thermostat.

Heat Pump Heating and Cooling, and Heat Pump Water Heaters: As in the residential program, it is proposed to incentivize business adoption of high-efficiency heat pump systems for heating and cooling, as well as heat pump water heaters. The recently proposed three-tier rate structure with an attractive winter electricity price, if approved by the Commission, is expected to make the adoption of electric heating measures even more cost effective for customers. By offering the

incentives proposed above, BIUD aims to encourage the installation of the most efficient electic heating or cooling systems.

Customers who install weatherization, additional lighting, or HVAC measures will be given their rebate after work has been completed and inspected. BIUD will offer rebate forms to customers both online and in person at the BIUD office and will require customers to provide proper documentation from the contractor who performed the job, in the form of a receipt or work order. Customers submitting rebates for eligible thermostats need only provide a purchase receipt as proper documentation with their rebate form. If a customer has any problems or questions regarding a rebate form, their contractor may be able to help complete relevant fields, and customers can always reach out to BIUD staff for assistance during business hours.

4. Program Administration and Management

The proposed management structure has been designed to ensure successful program delivery and implementation, effective customer outreach, timely customer service and rebate processing, and insightful data collection and reporting. Specifically, to achieve these outcomes, the District proposes a strong on-going collaboration with the Office of Energy Resources and proposes to hire an efficiency consultant to help administer the program and conduct program reporting.

i. Vendor Engagement

One of the critical elements to the success of the proposed DSM plan is the engagement of knowledgeable and reliable vendors. BIUD will be soliciting one vendor to provide energy assessments, direct install services and, if desired by the customer, weatherization measures to residential and business customers. The District will also be seeking a separate vendor to provide post-installation inspections for business customers and all residential non-direct install (e.g. weatherization and HVAC) measures. BIUD proposes issuing two competitive RFPs to hire a lead energy assessment vendor and a lead inspection services vendor, respectively.

The scope of work for these vendors will be designed to require comprehensive scheduling, high-quality in-person services, and coordination with BIUD staff. Selected vendors will be responsible for delivering efficient and effective services to customers, ensuring proper deployment and installation of incentivized energy efficiency measures, processing invoices and rebates in a timely fashion, and creating insightful program data reports.

ii. Program Management and Oversight

The District, recognizing the importance of robust oversight, data reporting, and program administration, will ensure staff will be trained and knowledgeable about the proposed program offerings and rebate process in order to effectively work with vendors, consultants, and customers in the delivery of the proposed DSM plan. BIUD also proposes several means of securing additional resources to support its management and oversight of the proposed plan. For example, the District plans to continue its ongoing engagement with the Office of Energy

Resources (OER) in order to leverage lessons learned and best practices from *Block Island Saves* and will also tap into the diverse set of efficiency expertise that OER can provide. Additionally, the efficiency consultant BIUD proposes hiring will help manage the program and its implementation, including the processing of rebates, the collection of data, and reporting on program performance.

Block Island Utility District will make rebate forms, including a listing of measure eligibility requirements, available both in person and online for customers to access. Once customers complete and submit rebate applications – either by mail or via email - the District's rebate processing vendor will review them for accuracy and eligibility. All eligible applications received and reviewed will then be processed for payment to the customer, funds permitting, and customers should expect to receive their rebate in four to six weeks.

BIUD recognizes the importance of scheduling efficiency for the cost-efficiency of the proposed programs, since vendor travel to and from Block Island creates additional expenses compared to mainland efficiency programs. In order to minimize vendor trips to the Island, BIUD and its vendor will maximize the number of opportunities (assessments, weatherization, HVAC installations, etc.) completed in a day. The RFP the District will use to procure vendors will be explicit about the importance of scheduling efficiency and will ask respondents to explicitly address this important cost-barrier.

In the event that there is overcollection of ratepayer funds that are not spent on DSM programs in a given year, BIUD will roll those funds over into the next year. The subsequent DSM plan will indicate the exact budget category or categories those funds will be allocated to. Every effort will be made through careful planning, oversight, and budget tracking to ensure that there are not budget overages in a given year. In the event that a budget overage becomes a possibility within a given year, the District will close specific program(s) prior to an overage until the following year when funds become available again. As the District's DSM plan evolves, participation rates will help inform budget setting for future years to ensure funds are allocated as accurately as possible to meet customer demand.

iii. Customer Engagement

Table 4.1 – Proposed Customer Outreach Channels and Budget Allocation		
Customer Outreach		
Total	**$5,250.00**	Outreach through Local Publications, Bill Inserts, Online, and Community Bulletin

While the *Block Island Saves* pilot program was very successful, it did conclude over two years prior to this proposed DSM plan. Therefore, BIUD will need to strategically engage customers in order to promote the return of efficiency programming to Block Island. In order to ensure customers are aware of the program and its offerings, as well as provide instructions on how to participate, BIUD will be promoting the DSM programs through the following channels:

1. Bill inserts will be included with customer bills at four different times during the year to advertise the DSM programs, provide information about how customers can participate, and highlight incentive opportunities.
2. BIUD will take out quarter page advertisements in the local publications for multiple weeks during both peak and off-peak seasons in order to reach as many customers as possible. These advertisements will provide information on the programs and have seasonal calls to action to encourage customer participation.
3. BIUD will also utilize several no-cost engagement channels, like the community bulletin and the District's Facebook page to spread the word about the DSM program to customers throughout the year.
4. Lastly, BIUD office staff will also be trained on the programs, available offerings, and ways customers can engage with energy efficiency in order to provide accurate information to customers coming into and/or calling the office with questions.
5. If other outreach opportunities arise, the District may pursue other channels of communication with customers if budget allows.

iv. Program Reporting

As was discussed in section 4.ii, *Program Management and Oversight*, BIUD proposes to hire an efficiency consultant to help oversee and manage the DSM programs. In addition to helping oversee the programs and assisting with the Plan's implementation, the efficiency consultant will assist the District with quarterly progress reports, which will help inform a mid-year and year-end report as well as provides guideposts for program performance throughout the year. The data that will be included in quarterly reports as well as the year-end report are as follows:

- Number of participants per sector (Residential vs. Business)
- Costs incurred to date and percent of budgeted spend (by budget category)
- Detailed accounting of what measures have been installed, both direct install and other measures incentivized by the DSM programs
- Number of rebates processed, by measure type
- Number of inspections completed out of number of inspections required, and associated costs.
- kWh and delivered fuel (oil, propane) savings, both annual and lifetime, resulting from the program
- Peak demand reduction resulting from the program
- Other data as required, or as deemed necessary by the District or the Commission

5. Conclusion

The Block Island Utility District believes that the proposed DSM plan describes and establishes an energy efficiency program that will provide considerable benefits to customers and the local grid throughout its implementation. There are significant energy savings opportunities in New

Shoreham, which will be clearly highlighted in a forthcoming market potential study being conducted for all of Rhode Island. While this market potential study is underway, this plan offers effective strategies to realize immediate energy savings on the Island. The plan provides opportunities for no-cost assessments and direct-install measures that all customers can access free of charge, as well as guidance and further incentives for deeper energy saving measures.

The proposed 2020 DSM plan iterates on the *Block Island Saves* pilot program to provide BIUD customers will access to a variety of energy saving measures. The Plan, if approved by the Commission, would provide heat pump incentives that are likely to help smooth New Shoreham's annual demand curve and enhance the benefits of BIUD's proposed new rate structure. Additionally, through weatherization, lighting controls, and programmable thermostat incentives, BIUD aims to drive additional customer investment in insulation and demand side management technologies.

In sum, this proposed DSM plan provides a strong foundation for efficiency programming on Block Island and is structured to deliver significant benefits to customers and the local grid.

Block Island Utility District respectfully requests that the Public Utilities Commission (PUC) approve this 2020 Demand Side Management plan, and its associated budgets, in their entirety. Specifically, the District requests that the PUC approve the following:

The proposed total budget amount and the budget categories contained therein.

The proposed program offerings.

Direct Testimony

Of

Jeffery M. Wright

For

Block Island Utility District DBA Block Island Power Company

February, 2020

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

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

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

A. I am the President of the Block Island Utility District DBA Block Island Power Company.

Q. Can you please describe your education and experience?

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

From 1999-2007 I worked at the Vermont Electric Power Company (VELCO). I was a member the company's Senior Leadership Team and was responsible for managing the company's assets which included over 35 high voltage transmission substations, more than 700 miles of high voltage transmission lines, all rights of way and the company's facilities and fleet assets. I also managed the assets of the Vermont Electric Transmission Company (VETCO) which owns and maintains Vermont's portion of the 450 kV DC "Phase One" line.

From 2008-2016 I was the Chief Operating Officer at the Vermont Electric Cooperative, the state's second largest utility and largest electric cooperative which served approximately 40,000 electric meters across nearly 1/3 of the state of VT. I was responsible for all of the company's operations including transmission and distribution operations, substations and system operations and engineering. I worked closely with the company's CFO in developing long capital plans, long range financial forecasting and supported several rate cases.

I have been the President of the Block Island Power Company and Block Island Utility District since February 2017.

Q. What is the purpose of your testimony?

A. The purpose of my testimony is to sponsor the Block Island Utility District's Demand Side Management (DSM) Plan.

Q. Is this a new program that the Block Island Utility District is seeking to implement or the renewal or update of an existing plan?

A. This is a new program. Rhode Island Office of Energy Resources (OER) ran a successful pilot program for Block Island during the years 2015-2017, Block Island Saves. The Block Island Power Company did not fund any of that effort but supported it and helped to promote it. This new program is a collaborative effort between the Block Island Utility District (BIUD) and the RI-OER.

The DSM Plan was written by Nathan Cleveland who is the Programming Services Officer for Energy Efficiency at OER. Nathan will be available at any and all hearings to answer questions and will provide information and answer any data requests.

Q. When you would like to implement this plan?

A. We would like the plan to be approved for implementation starting on June 1, 2020. This coincides with the date that we requested our new rates to go into effect.

Q. What is the annual budget for the plan?

A. The total annual budget for the program for the program is $120,000. Of this amount, $60,000 will be funded by BIUD's Energy Efficiency Surcharge. The remaining $60,000 will be funded by matching OER RGGI funds.

Q. How does BIUD propose to structure the Energy Efficiency Surcharge, and when will the revenues be received from its consumer/members?

A. The Utility District has proposed a three-tier rate structure. We are proposing that the Energy Efficiency Surcharge be collected in the Shoulder and Peak periods only. The proposed three rate periods and associated surcharges are shown below:

OFF PEAK				SHOULDER		PEAK		SHOULDER		OFF PEAK	
J	F	M	A	M	J	J	A	S	O	N	D
				$0.00395/KwH		$0.01/KwH		$0.00395/KwH			

Q. If BIUD plans to collect $60,000 per year from the EE Surcharge and it begins collecting it on June 1, 2020 there will be a slight shortfall in meeting the $60,000 annual revenue goal. What will be the effect of this shortfall and how will BIUD adjust for this?

A. In Docket 4975, Schedule DGB-RY-2a2, David Bebyn CPA projects kilo-watt hour sales of 1,019,298 kWh in May, 2020. The revenue shortfall from not collecting the $0.00395/kWh during May 2020 is projected to be $4,026. BIUD will adjust its budget accordingly by this small amount if necessary.

Q. How is the overall annual budget of $120,000/year allocated to Residential Programs, Commercial Programs, Inspections, Program Administration and Customer Outreach?

A. Table 2.1 of the DSM Plan (Page 80 of 115) details the overall budget allocations. Approximately 44% of the budget is directed to Residential Programs, 27% towards Commercial Programs, 24% towards inspections and administration and 4% towards outreach and marketing.

Q. Does BIUD have adequate resources to administer the program and complete the necessary quarterly and annual reports?

A. No. BIUD has only two administrative personnel. This does not provide enough resources to administer the program in-house. Therefore, we have developed an

outsourcing plan with RI-OER so that we will contract out the plan administration, customer interface and reporting to an external firm who has the expertise in Demand Side Management. The internal staff at BIUD will provide marketing, advertising, promotion and initial consumer/member interaction. We feel that in this way, we can manage the program.

Q. What level of public input was considered in the development of the EE Plan?

A. BIUD reviewed Mr. Cleveland's DSM Plan at our October 23, 2019 Board Meeting. Mr. Cleveland presented his work and there was robust discussion among the Board of Commissioners and those consumer/members in attendance. After discussion and receiving feedback, Mr. Cleveland later made edits to the EE Plan and returned it to BIUD for review. The plan was approved unanimously by BIUD at the January 16, 2020 Board Meeting.

Q. How long has OER committed the $60,000 match for?

A. The OER has secured RGGI funds for the $60,000 match through 12/31/2022.

Q. Does this conclude your testimony?

A. Yes.

JEFFERY WRIGHT
PO Box 520, Block Island, RI 02807
802.730.4233

SENIOR EXECUTIVE

20 years of senior leadership team and executive experience providing fiscal, strategic and operations leadership for electric utilities and extremely proud of a 15 year foundational start on the front lines of my home town utility.

Strategic thinking and results-driven senior executive with an outstanding reputation of building high performing organizations in fast-paced utility environments. Superior interpersonal skills, capable of resolving multiple and complex issues and mentoring employees to achieve optimum levels of productivity. Recognized for developing respected and strong relationships with local governing bodies, governor's staff, state and local representatives and regulatory agencies.

Additional areas of expertise include:

- Strategy, Vision & Mission Planning
- Board of Director Relations
- Coop Member Relations
- Finance, Budgeting & Cost Management
- Federal & State Regulations
- Transmission and Distribution Planning
- Team Building & Employee Engagement
- Government Relations
- Grant Management (EDA, FEMA)
- Policy & Procedure Development
- Operations
- Human Resource Management

PROFESSIONAL EXPERIENCE

President, Chief Executive Officer
BLOCK ISLAND UTILITY DISTRICT – BLOCK ISLAND, RI **3/2019-Present**

The Block Island Utility District (BIUD) is a not-for-profit public utility district that serves roughly 2,000 members on Block Island, which is located 14 miles off the coast of Rhode Island. The coastal weather conditions are harsh and disaster recovery and logistics planning is "the norm".

Block Island is host to the nation's first off-shore wind farm; the 30MW Deep Water Wind Project. The Island population explodes to >30,000 people during the summer months increasing the electric load by 5X. We play a key role in supporting Rhode Island's largest tourism destination in serving the thriving summer time economy.

The company owns and operates 50 miles of distribution line, a 7.5 MW back up diesel powered generation plan and an interconnection to National Grid's Sea2Shore submarine cable and wind farm. The company is undertaking a significant restructuring in rates following the previous company's debt refinancing and the acquisition loan.

Notable Accomplishments:

- Instrumental in organizing the Utility District Commission, helping to set policies and short- term planning goals.

Successfully negotiated the CFC long term acquisition debt terms, operating lines of credit and a letter of credit for ISO-NE financial assurance and sponsored the approved debt filing at the RI Division of Public Utilities and Carriers.

- With the help of CFC, very good interest rates and the restructuring of legacy debt from the Block Island Power Company, I delivered a revenue neutral rate case for all consumer classes which includes a new demand side (efficiency) management plan, a new $400K capital plan with a surplus that I am proposing to be assigned to a restricted reserve account to fund a future system-wide voltage conversion (the last time there was any base rate increase on Block Island was 2008 so delivering this news five months after the acquisition has set a celebratory tone on the island).
- Under my leadership, BIUD became the first member of NRECA in Rhode Island and the 48th state represented. I was also unanimously elected to serve as RI's representative on the NRECA Board of Directors.
- Successfully transitioned all contracts, service agreements, ISO-NE participation agreements and employee benefits to BIUD.

President, Chief Executive Officer
BLOCK ISLAND POWER COMPANY – BLOCK ISLAND, RI **2017- 3/2019**

The Block Island Power Company had been an investor owned generation and distribution utility since 1925. In November 2016, the Town of New Shoreham purchased 2/3 of the shares with the goal of selling the company to the newly formed Block Island Utility District. The sale was closed on in March, 2019.

The company made great progress under the majority ownership of the Town, improving customer relations, making significant operational changes after connecting to the Sea2Shore Cable and launching the start of a significant capital improvement plan to address an aging pole plant and fire damaged generator plant. With the help of a CoBank loan we made these improvements with no rate impact.

Notable Accomplishments:

- Quickly built a trusting relationship with an anxious group of employees by addressing decades of employer neglect by meeting daily with them to proactive communicate imminent changes, involving them in strategic decisions, making appropriate wage adjustments for fair pay, offering trainings, supplying proper PPE and purchasing necessary trucks and tools. I led by example and became a hands on manager, working closely with them all, to build my credibility.
- Successfully managed the interconnection construction, transition from the diesel-powered generation plant to the Sea2Shore Cable and integration with the nation's first off-shore wind farm; Deep Water Wind's Block Island Wind Farm.
- Managed the company restructuring "post May 1, 2017" when it transitioned to the cable from the generators which included human resource changes, power supply procurement, ISO-NE enrollment/new participant process and other significant operational change.
- Initiated a significant customer outreach effort in anticipation of the transition to the Block Island Utility District; testified in support of the enabling legislation, led the public outreach efforts and successfully positioned the existing company to transition to a non-profit utility district. Worked closely with all stakeholders to find acquisition financing through CoBank and CFC and managed the power company appraisal and negotiations between the existing power company and the Block Island Utility District.
- Developed and implemented maintenance and capital improvement programs to address long deferred maintenance. Also managed the generation plant reconstruction after a fire destroyed half of the capacity.

- Successfully implemented the full suite of NISC software systems which replaced outdated or non-existent software systems; including CIS, MDS, ABS, SmartHub, Mapwise and OMS.
- Successfully and quickly gained the trust of the Rhode Island Office of Energy, Public Utilities Commission and Division. Regularly testifies in standard offer and transmission rate adjustments and other regulatory proceedings; retail choice exception, power supply contract approvals and other matters. Currently leading the effort to redesign rates, adjust revenue requirements and preparing the supporting schedules and testimony.
- Established a renewed level of trust between the power company and our customers building customer engagement.
- Served on the company's Board of Directors (one of three directors).

Chief Operating Officer - COO
VERMONT ELECTRIC COOPERATIVE ~ JOHNSON, VT **2008-2016**

Chief Operating Officer of an $80M consumer-owned cooperative serving 75 towns and 8 counties in northern Vermont. VEC owns and operates 2,600 miles of distribution lines, 152 miles of transmission lines and serves nearly 40,000 meters. Recognized for developing a new vision, strategic direction and operational process improvement at a critical time for VEC after acquiring an under-performing IOU twice its size and while VEC was under investigation by state regulators due to poor service and worker safety.

Notable Accomplishments:

- Successfully merged the different cultures of an investor-owned utility with VEC after a 2006 acquisition. This included work processes, workforce, engineering standards and most importantly safety cultures.
- Developed and successfully implemented a ten-year capital rebuild plan for both companies, which is now VEC's standard long-range capital planning process which followed decades of system investment deferrals on behalf of the acquired utility and VEC.
- Successfully obtained and managed EDA ($14.5M), DOE ($10M) and FEMA grants, both recovery and hazard mitigation ($6M) in recent years.
- Successfully negotiated, jointly with CFO, many power supply contracts including a joint ownership agreement and PPA for a portion of a 63 MW wind generation plant located in VEC's service territory and many solar PPA's, which all support VEC's renewable mandates.
- Instrumental in bringing VEC's operation technology to the leading edge by installing AMI meters, fiber and SCADA at every one of the 36 substations and metering points.
- Redesigned and built a state of the art 24X7 Control Center which resulted in improved workflow, dispatch efficiency and improved grid management.
- Decreased outage frequency rate (SAIFI) from 3.6 in 2007 to its current 1.8 in 2016 which resulted in the highest Member Satisfaction Index as measured by our NRECA member survey implemented in 2008.
- Instrumental in the elevation of VEC's credit rating given by Standard & Poors (S&P) from a BBB- to an A+ rating by keeping rate increases less than 1% each year since 2009, the result of improving regulator relationships and developing a strong management team.
- Created a culture within VEC that embraces economic development. Under my leadership, VEC is building out infrastructure and creating incentive rates for two large Vermont ski areas, Smuggler's Notch and Jay Peak Resort and the world's largest maple producer, Sweet Tree Holding, Inc.

Manager, NERC Compliance
VERMONT ELECTRIC POWER COMPANY, INC. ~ RUTLAND, VT **2006-2008**

Developed and implemented NERC compliance program at VELCO under direction of VELCO's CEO, following the 2003 black out. Worked with NERC and their appointed drafting team on the first version of Reliability Standard *FAC-001: Vegetation Management*.

Manager, Asset Management
VERMONT ELECTRIC POWER COMPANY, INC. ~ RUTLAND, VT **1999-2006**

Successfully managed the maintenance of all VELCO and VT Transco assets within budget while keeping Vermont bulk transmission grid safe and reliable. VELCO's assets included transmission lines and substations up to 450kV DC, operational district facilities, more than 600 miles of rights of way, vehicle fleet, heavy equipment and specialty tracked equipment. Coordinated work by employees that resulted in VELCO being awarded the Safety and Health Achievement Recognition Program (SHARP) excellence award for safety.

VERMONT ELECTRIC POWER COMPANY, INC. ~ RUTLAND, VT
Control Center Outage Coordinator **1998-1999**

VERMONT ELECTRIC POWER COMPANY, INC. ~ RUTLAND, VT
Control Room System Operator **1996-1998**

CENTRAL VERMONT PUBLIC SERVICE ~ RUTLAND, VT
Substation and Generation Plant Electrician **1989-1996**

CENTRAL VERMONT PUBLIC SERVICE ~ RUTLAND, VT
Summer Help for Transmission Lines Crew and Substation Crew **1984-1989**

EDUCATION

Southern New Hampshire University (SNHU), *Associate Degree in Accounting*

BOARDS, COMMITTEES & MEMBERSHIPS

NRECA Director Elect – Representing RI
Action Committee for Rural Electrification (ACRE) – President's Club Member
Past VELCO Operating Committee
Vermont Department of Labor – Apprenticeship Council (past long-term member)
Vermont Department of Labor – Workforce Investment Board (past long-term member)
NERC Drafting Committee (Vegetation Management Standard – 2004)

INDUSTRY PUBLICATIONS

Transmission and Distribution World, Nov. 2005 Cover Story: *"When Transformers*

Go Bad, Transforming a Transportable Transformer into a Mobile Unit".

Weidmann Technical Conference Nov. 2005*: "The Use of Dry Type Instrument Transformers and the Reliability Concerns"*

Doble Engineering World Conference, March 2004**:** *"Retrofitting a Transportable Transformer"*

Weidmann Technical Conference Nov. 2004*: "Failure Analysis of a Mitsubishi 115 kV SF6 Gas Breaker:*

Weidmann Technical Conference Nov. 2003*: "Retrofitting a Transportable Transformer*

PERSONAL GROWTH & DEVELOPMENT

Vistage Executive Coaching
KRW International Executive Coaching
Management Profile and Leadership Assessment, McMillan & Associates, Cleveland, Ohio
Executive Assessment and High Potential Development, RHR International (www.rhrinternational.com), Grant Levitan, PhD., Chicago, Illinois

NATHAN J. CLEVELAND

NATHAN.CLEVELAND@ENERGY.RI.GOV | 207.577.5081 | LINKEDIN.COM/IN/NATHANCLEVELAND1

ENERGY EFFICIENCY & SUSTAINABILITY PROFESSIONAL

Creative sustainability and efficiency professional with a passion for building efficiency and clean energy with experience in grant writing and energy regulations in both academic institutions and state and local government. Significant experience working on municipal energy challenges, engaging stakeholders, and navigating local politics to achieve success.

PROFESSIONAL EXPERIENCE

Rhode Island Office of Energy Resources — 2019 - Present

Programming Services Officer, Energy Efficiency — 2019 - Present

- Support energy efficiency programming across Rhode Island, with a focus on municipalities, agricultural producers, and municipally owned utilities
- Collaborate with numerous stakeholders to develop effective and comprehensive energy efficiency programs with statewide reach
- Manage the Efficienct Building Fund, helping to unlock low-cost financing for public sector entities
- Coordinate the Lead by Example initiative supporting comprehensive public sector efficiency projects
- Develop and implement robust frameworks for tracking efficiency program progress and reporting results

Energy & Sustainability Committee, Town of Stoughton, MA — 2015 - Present

Chairman — 2016 - Present
Committee Member — 2015 - 2016

- Collaborate with Town Manager, Board of Selectmen, and external agencies on municipal energy efficiency and sustainability projects, make policy recommendations, and present findings to the public
- Managed Green Communities grant designation process and secured ~$500,000 in grant funding
- Coordinated municipal energy aggregation program to stabilize energy prices and provide choice
- Led textile recycling initiative with waste diversion of 35,000 pounds in initial program year (2017)

Harvard Law School — 2010 - 2019

Program & Communications Coordinator/Executive Assistant, Cambridge, MA — 2015 - 2019
Team Lead, Harvard Law School Green Team, Cambridge, MA — 2014 - 2019
Executive Assistant & Program Coordinator, Cambridge, MA — 2013 - 2015
Faculty & Program Assistant, Cambridge, MA — 2011 - 2013
Faculty Assistant, Cambridge, MA — 2010 - 2011

- Manage digital and print communications strategy for active research center
- Managed design and development of two websites in WordPress, focusing on engagement, interactivity, and cross-platform integration
- Manage budget and finances for both faculty director and research Center
- Plan, coordinate, and market weekly speaker events and larger conferences of 300+ attendees
- Lead strong growth in campus Green Office Program, increasing efficiency and reducing waste
- Achieved 90+% waste diversion at Commencement, Reunions, and other large events

EDUCATION

Master of Liberal Arts, Sustainability & Environmental Management, 2017 • Harvard University, Cambridge, MA
Dean's List; Certificate in Corporate Sustainability & Innovation

Bachelor of Arts, Political Science & Government, 2007 • Tufts University, Medford, MA

TECHNOLOGY SKILLS

Proficient in Microsoft Office Suite, Adobe InDesign and Photoshop, Social Media Platforms, WordPress, and MailChimp.

ADDITIONAL WORK EXPERIENCE

Tufts University — 2008 - 2010

Assistant Coach, Tufts University Men's Track & Field, Medford, MA — 2008 - 2010

- Developed workouts in conjunction with head coach for middle distance runners
- Oversaw strength & conditioning sessions in conjunction with strength training staff
- Coordinated transportation to meets and ensured proper athlete registration and seeding

Massachusetts College Advising Corps — 2007 - 2009

College Advisor, Somerville High School, Somerville, MA — 2008 - 2009
College Advisor, Springfield High School of Science & Technology, Springfield, MA — 2007 - 2008

- Assisted students with all aspects of college application process – test preparation & registration, financial aid, application essays and paperwork, and school selection
- Hosted numerous financial aid and application guidance workshops for families
- Provided in-school, on demand assistance and guidance as needed in conjunction with school guidance staff
- Made in-class presentations on essay writing
- Led local college visits with student groups