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October 6, 2023

**VIA ELECTRONIC MAIL**

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

**RE: Docket No. 23-35-EE – The Narragansett Electric Company’s d/b/a  
Rhode Island Energy’s Combined 2024-2026 Energy Efficiency Three-Year Plan  
and Annual Energy Efficiency Plan for 2024  
Attachment 11**

Dear Ms. Massaro:

On behalf of The Narragansett Electric Company d/b/a Rhode Island Energy (the “Company”), enclosed, please find ten (10) copies of Attachment 11 to the Company’s 2024 Annual Energy Efficiency and Conservation Procurement Program Plan which was filed on October 2, 2023 in combination with the 2024-2026 Energy Efficiency Three-Year Plan.

The Company is providing copies of Attachment 11 for insertion and placement under tab identified as Attachment 11 to the book versions of the Plan that were hand delivered to the Commission on October 3, 2023.

The Company has applied Bates stamp starting at page 473 to this attachment to continue from Bates stamp 472 in the book version.

Thank you for your attention to this filing. If you have any questions, please contact me at 401-784-4263.

Sincerely,

A handwritten signature in blue ink, appearing to read "Andrew S. Marcaccio".

Andrew S. Marcaccio

Enclosures

cc: Docket No. 23-35-EE Service List



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# 2023 Rhode Island Energy Efficiency Equity Working Group Report

Prepared by Green & Healthy Homes Initiative

For inclusion in

Rhode Island Energy's 2024 Annual Plan

September 2023

September 29, 2023

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### Executive Summary

As part of its [2021-2023 Energy Efficiency Program Plan](#) (2021-2023 EE Plan) Rhode Island Energy (“the Company”) committed to continue working with the Green & Healthy Homes Initiative (GHHI) to facilitate the Rhode Island Energy Efficiency Equity Working Group (RI EWG). With support from the Rhode Island Office of Energy Resources (OER), the desired goal of the RI EWG is to provide the Company with written recommendations to better incorporate equity in the planning, design, and delivery of its Energy Efficiency Programs. The Company will use these recommendations to propose the elimination of or alteration of current programs and services to better reach the Company’s diverse customer base.

In 2023 the RI EWG, comprised of thirty-three stakeholders representing a variety of organizations, personal backgrounds, and experience met four times during June and September to identify equity-related challenges and to develop recommendations to incorporate in the Company’s 2024 Annual Energy Efficiency Plan. Below is a table of key issues and recommendations that EWG members identified in Year 3. The equity issues and recommendations below are accompanied by a list of suggested strategies, metrics, and targets set out by group members later in this document.

#### 2023 RI EWG Equity Key Issues and Recommendations

Key Issue	Recommendations
<p><b>1. Participation Barriers:</b> The Company's energy efficiency programs continue to experience low participation rates among BIPOC and Low-to Moderate Income (LMI) residents.</p>	<p>1) Increase participation rates from residents living in the 5 Equity Communities across the EnergyWise and IES Programs</p> <p>2) Offer Home Energy Assessments (HEAs) in at least 4 languages other than English with the resulting Home Energy Reports translated in the household's primary spoken language by the end of 2024</p>
<p><b>2. Multifamily Barriers:</b> Multifamily housing has always been a difficult area for energy efficiency program implementers to reach due to multiple issues including the split incentive issue between landlords and renters.</p>	<p>1) Increase participation rates among EnergyWise Multifamily and Income Eligible Multifamily Programs statewide, with a focus on the 5 Equity Communities and/or Justice 40/EJ Communities.</p> <p>2) Increased focus on renter-specific resources, including but not limited to information on what is available for renters and renter-friendly DIY home improvements. While noted that it can be difficult to distinguish who is a renter or owner at the property level, the Company should investigate ways to better track this</p>
<p><b>3. Weatherization Deferrals:</b> The presence of housing conditions that prevent or defer enrollment in weatherization programs in RI are common. RISE reported of the 11,930 homes receiving assessments through Q2 of 2023, 54 percent of those households had pre-</p>	<p>1) Close the gap in the Conversion to Weatherization ratio between EnergyWise and IES programs by XX% over the next XX months</p> <p>2) Continue to leverage and provide additional funding for pre-weatherization barrier remediation</p>

<p>weatherization barriers, and only 24.6 percent of those barriers were resolved.</p> <p><u>2022 Program Results</u></p> <p>EnergyWise (Market Rate):</p> <ul style="list-style-type: none"> <li>• 9,251 Assessments &amp; 4,143 Wx Participants</li> <li>• Conversion Rate: 45%</li> </ul> <p>Income Eligible Services (SF):</p> <ul style="list-style-type: none"> <li>• 2,679 Assessments &amp; 758 Wx Participants</li> <li>• Conversion Rate: 28%</li> </ul>	<p>3) Engage with the new State Department of Housing, cities/towns code officers, and/or housing courts. Better coordination between agencies can potentially address the pre-Wx issue.</p>
<p><b>4. Workforce Development/Training:</b> The RI EWG continues to have discussions and develop recommendations for the Company on equitable workforce development and training opportunities to better serve and work with Minority and Women Owned Business Enterprises (MWBES). The Company must focus on building a skilled workforce that better reflects the communities that it serves.</p>	<p>1) Increase the % of BIPOC workforce training participants and contractors that reside in the 5 Equity Communities (or Justice 40/EJ Communities) year over year by XX%</p> <p>2) Increase # of and capacity of minority contractors by XX% in 2024 (create multi-year targets)</p> <p>3) Increase the # and size of contracts awarded to MWBEs who conduct energy audits and weatherization services by XX% in 2024.</p>
<p><b>5. Microbusinesses and Small Businesses:</b> Microbusinesses and small businesses (&lt;250,000 annual kWh electric consumption) comprise the largest share of unique C&amp;I customer accounts but have the lowest participation rates among C&amp;I customers due to several challenges including split incentives, lack of technical capacity, and limited capital.</p>	<p>1) Leverage findings from the 2023 Small Business Process Evaluation to improve program strategy</p> <p>2) Conduct Main Street efforts in all five communities identified in the 2024-2026 EE Plan Narrative</p> <p>3) Develop translated program materials, as suggested in the SBDI Process Evaluation</p>
<p><b>6. Metrics Tracking/Reporting:</b> Based on RI EWG member feedback, the Company should significantly strengthen its equity-related data collection and reporting on key metrics tied to RI EWG recommendations.</p>	<p>1) Through Q4 2023, work with the RI EWG and the Company to come to an agreement on 2024 metrics and targets the Company can commit to tracking and achieving.</p>

Of note, the challenge identified above concerning metrics tracking and reporting was a recurring theme during meetings as workgroup members would like to see the Company develop a dashboard or more comprehensive reporting template comprised of baseline data and key metrics to enhance reporting concerning current and past recommendations. To help advance this work moving forward, the group explored and developed suggested metrics and targets for each recommendation to help the Company’s staff and RI EWG members increase their understanding of key issues and to support increasingly meaningful and impactful analysis and recommendations in the future.

### Background/Introduction

The Company, as a part of its 2021-2023 Energy Efficiency Program Plan (2021-2023 EE Plan), committed to working with the Rhode Island Office of Energy Resources (OER) to co-host an Energy Efficiency Equity Working Group (EWG). The EWG was envisioned to 1) be comprised of representatives from state agencies, community-based organizations, advocacy organizations, and local subject matter experts in

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equity; 2) provide a space where the voices and concerns of impacted communities could inform discussions on equity issues; 3) identify areas of importance and focus around issues of equity for energy efficiency programs; and 4) be a resource in the development of future Annual and Three-Year Energy Efficiency Plans, alongside related evaluation efforts. The desired deliverable from the EWG was to provide the Company with written recommendations to advance equity in the planning, design, and delivery of its Energy Efficiency Programs. The Company would then use these recommendations to propose the elimination of or alteration of current programs, or the development of new programs or services that would help to better serve the Company's diverse customer base.

The EWG has given impacted communities, and the organizations that serve them, an ongoing and structured opportunity to collaborate and provide input and feedback on the planning and delivery of the Company's energy efficiency programs, with a specific focus on equity.

The Company contracted with the Green & Healthy Homes Initiative (GHHI) in 2021 to facilitate the development and implementation of the EWG throughout Years 2 and 3. GHHI is a national non-profit organization dedicated to addressing the social determinants of health and the advancement of racial and health equity through the creation of healthy, safe, and energy efficient homes. GHHI maintains a Rhode Island office that works to coordinate federal, state, and philanthropic resources to provide low-income Rhode Island residents with integrated energy efficiency, health, and safety housing retrofit programs. More information on GHHI can be found in the Appendix and at [www.ghhi.org](http://www.ghhi.org).

## Methodology

### EWG Member Recruitment

During Year 3, GHHI continued to work to retain participation in the RI EWG from previous years and to recruit additional stakeholders and residents to bring unique equity focused perspectives and solutions to the Company's energy efficiency related programs and activities. As in previous years, recruitment efforts aimed to:

- Prioritize individuals and organizations that had experience and expertise providing services or designing and implementing policies that benefit residents of underserved and under-resourced communities with a focus on limited income households, black and brown residents, and other communities served by the Company.
- Add perspectives that have not traditionally been represented in energy efficiency proceedings and/or policy and program advocacy, and
- Build diversity among RI EWG members including, but not limited to, gender, race, economic status, and geography to ensure a wide range of perspectives.

In addition, the Rhode Island Office of Energy Resources (OER) provided additional recruitment support through the Climate Justice Hour group. The Climate Justice Hour, hosted by the Rhode Island Department of Environmental Management (RI DEM) and OER, is an open meeting space for community members, organizers, and environmental justice advocates to discuss pressing climate change issues that have affected Rhode Island communities. As a result of this recruitment effort, the RI EWG welcomed 15 new members who joined for one or more working group meetings this summer.

### Year 3 RI EWG Facilitation Team:

- Bryan Evans, GHHI RI (Lead Facilitator)
- Bert Cooper, GHHI

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- Catherine Lee, GHHI
- Angela Li, Rhode Island Energy
- Spencer Lawrence, Rhode Island Energy
- Brendan Dagher, Rhode Island Energy
- Brett Feldman, Rhode Island Energy
- Matthew Maini, Rhode Island Energy
- Steve Chybowski, RI Office of Energy Resources
- Greg Ohadoma, RI Office of Energy Resources

**Year 3 RI EWG Members:** Members listed below attended at least one meeting.

- Brenda Clement, HousingWorks RI
- Garry Bliss, Prospect Health Systems Medicaid AE
- Dayanarah Baez, Community Action Partnership of Providence
- Margie Lynch, RI Energy Efficiency & Resource Management Council C-Team
- Margarita Robledo, Rhode Island Builders Alliance
- Jordan Galluzzo, Optimal Energy
- Karen Verrengia, CLEAResult
- Emily Koo, Acadia Center
- Rachel Calabro, RI Department of Environmental Management
- Jeannine Silversmith, RI Environmental Education Association
- Leo Major, Green Energy Consumers Alliance
- Elder Gonzales Trejo, City of Providence
- Jenna Bagnall, Encolor
- Almin Pršić, Architect
- Priscilla De La Cruz, City of Providence
- Rele Abiade, One Rhode Consulting & Compete RI
- Karen Bradbury, RI Office of Energy Resources
- Brian Kearney, RISE Engineering
- Eileen Barrett, RISE Engineering
- Adrian Caesar, RI Energy Efficiency & Resource Management Council C-Team
- Lidia Nunez, Community Action Partnership of Providence
- Melina Lodge, Housing Network of RI
- April Brown, Racial and Environmental Justice Committee of Providence
- Sonakshi Saxena, National Grid

**EWG Meeting Timeline and Process Overview**

This year the EWG met during an abbreviated planning period that ran from June through September 2023 during which GHHI facilitated a total of four working group meetings. Multiple RI EWG members recommended reconvening earlier in the Winter to allow for ample time for in-depth discussions and feedback. Despite the abbreviated timeline, the group was able to develop a well-rounded set of recommendations and suggested strategies metrics and targets. During the final meeting on September 29<sup>th</sup>, EWG members provided final feedback, heard a preliminary response from the Company, and initiated discussions on the next steps for the RI EWG to sustain progress and build its capacity as a critical equity-focused resource for the Company.

RI EWG Meeting Dates and Agenda Summary			
Meeting #1, June 21 <sup>st</sup>	Meeting #2, August 8 <sup>th</sup>	Meeting #3, August 31 <sup>st</sup>	Meeting #4, September 29 <sup>th</sup>
<ul style="list-style-type: none"> <li>• Overview of Years 1+2</li> <li>• Year 3 Priorities &amp; Energy Efficiency Concerns</li> <li>• 2022 Q4 Equity Updates Review</li> </ul>	<ul style="list-style-type: none"> <li>• Review Updated Year 3 Timeline</li> <li>• Guest Presenters</li> <li>• Rhode Island Energy, 2023 Q2 Equity Updates</li> <li>• RISE, EE Program Barriers &amp; Opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Guest Presenters</li> <li>• Rhode Island Energy, Equity Demonstration Overview</li> <li>• National Grid, MA EE Workforce Development</li> </ul>	<ul style="list-style-type: none"> <li>• Report out on final set of recommendations</li> <li>• Obtain feedback from RI EWG and the Company</li> <li>• Discuss Future Direction and Next Steps for the EWG</li> </ul>

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	<ul style="list-style-type: none"> <li>EERMC C-Team, Equity-Related Priorities for the 2024-2026 Plan</li> </ul>	<ul style="list-style-type: none"> <li>Member Feedback on Emerging Priorities &amp; Recommendations</li> </ul>	
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## Meeting Summaries

### Year 3 Kickoff Meeting – June 21<sup>st</sup>, 2023

On June 21, 2023, GHHI facilitated the Year 3 Kickoff Meeting. With the addition of new EWG members, the facilitator provided an overview of the purpose of the EWG, intended goals for Year 3, and a high-level overview of Years 1-2. The facilitator explained that the group will develop recommendations to be included in the Company’s Annual Energy Efficiency Plan for 2024. In addition, the Company provided updates on the progress of equity commitments from Year1-2.

Gregory Ohadoma, Energy Justice Manager, spoke about his role at the Rhode Island Office of Energy Resources where he helps his office implement and include equity and justice in existing and future policies and programs. In addition, Greg helps facilitate the Climate Justice Hours group.

Matthew Maini, URI Energy Fellow and Rhode Island Energy Intern, then presented an overview of Q4 2022 Equity Updates, including improved outreach and marketing strategies to better reach non-participants and underserved communities, training courses for its Consumer Advocates, an improved customer follow-up process, and the early phases of a Rhode Island Workforce Needs Assessment with BW Research. For a full summary of each meeting and the Company’s quarterly Equity Updates, please refer to the Appendix.

**RI EWG Feedback/Comments:** Following the equity updates, GHHI opened the floor to hear from working group members on the Company’s Equity Updates, issues and topics they would like to focus on this year, and common concerns members hear or see regarding heating/cooling needs and energy efficiency programs. One key piece of feedback revolved around the need for more detailed equity updates. While members appreciated that work is being done in underserved communities, members would also appreciate seeing more meaningful data and metrics tracking. For example, it is good to see the number of events happening in underserved communities and the number of partner organizations the Company is working with, but it would be helpful to dive deeper into the results of these strategies – is there an increase in participation in a community after a Customer Expo? How many referrals from partners have been received and signed up for a home energy assessment?

### RI EWG Meeting #2 – August 8<sup>th</sup>, 2023

On August 8<sup>th</sup>, GHHI reconvened the RI EWG for Meeting #2. Based on feedback from the kickoff meeting, GHHI invited a slate of presenters to inform EWG members on 2023 Q2 equity-related updates, program barriers and opportunities, and the Energy Efficiency Resource Management Council (EERMC)’s priorities and recommendations. The goal of inviting the presenters was to help EWG members understand actions the Company has taken related to equity and hear from the program administrators of the EnergyWise programs concerning barriers households face and opportunities to overcome weatherization barriers. In addition, as the RI EWG prepares its recommendations for inclusion in the 2024 Annual Energy Efficiency Plan, the Company, and other relevant stakeholders,



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including members of the RI EWG, were working concurrently on the 2024-2026 Energy Efficiency Three-Year Plan. During the meeting, the EERMC Consultant Team presented priorities from the plan.

**Angela Li, Rhode Island Energy – Equity Updates:** Angela Li, Supervisor of Residential and Low/Moderate Income Programs, provided an overview of the Company’s 2023 Q2 Equity Updates. Angela provided a high-level overview of the number of participants across each city/town that participated in EnergyWise’s Home Energy Assessments, Weatherization, and Income Eligible Services Single Family programs. Angela also discussed current and potential organizations the Company would like to partner with to improve outreach strategies in underserved communities. For a full summary of each meeting and the Company’s quarterly Equity Updates, please refer to the Appendix.

**RI EWG Feedback/Comments:** Following Angela’s presentation, working group members were given an opportunity to ask questions and provide feedback. EWG members were interested in learning more about the Company’s proposed plan to provide financial support to community-based organizations and provide strategic outreach support in underserved communities. The \$40,000 allocated in the draft 2024 Annual Plan seemed low to EWG members. The Company was interested in hearing from members on how they could improve their outreach strategies to these organizations, and what the fee structure should be for supporting organizations. The RI EWG dove deeper into this topic in Meeting #3.

**Brian Kearney & Eileen Barrett, RISE Engineering – EnergyWise Programs Barriers & Opportunities:** In the kickoff meeting, RI EWG members requested to hear directly from the program administrators working on key programs. Brian Kearney, Director of Residential Services, and Eileen Barrett, Manager of Residential Energy Assessments, from RISE Engineering presented on the barriers customers experience while participating in the EnergyWise program. Brian and Eileen walked through program data from 2022 into 2023, highlighting the 15,774 assessments performed throughout this period, 11,661 households were identified as needing weatherization services, however, 54.66 percent of those households had pre-weatherization barriers that resulted in a deferral. The two most common barriers included knob and tube wiring and mold. To decrease deferral rates, the Company must identify opportunities for leveraging funding to address pre-weatherization barriers. Importantly, the group noted the disparities between the percentage of households that participate in the Income Eligible Services (IES) program had higher participation rates than the market rate programs. IES had 29.8 percent renter participation in Home Energy Assessments and 15.6 percent renter/landlord Weatherization participation through Q2 2023 while the EnergyWise program had 12.7 percent renter participation and 10.2 percent landlord/renter Weatherization participation. The EERMC C-Team did note that it is highly likely that renters comprise a higher percentage of IES customers than of market rate. Rhode Island Energy should provide any information on this to provide more baseline data to highlight the disparity.

Lastly, Brian and Eileen provided an overview of its MWBE contractors that participate in the EnergyWise programs, and the percentage of work performed by MWBEs on the program as 12%.

**RI EWG Feedback/Comments:** Following the presentation, working group members were given an opportunity to ask questions and provide feedback. In particular, EWG members were interested in learning more about potential funding opportunities to further address pre-weatherization barriers and current offerings, both in Rhode Island and regionally (e.g., Massachusetts). The Company explained the Heat Loan program, where to date, 26 customers used the 0 percent heat loan to overcome pre-

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weatherization barriers in 2022. Group members noted that lending programs may not be the most equitable or effective way to reach lower-income households and suggested that leveraging additional programs and grant funding can help address the deferral rates and improve participation in the Company's energy efficiency programs.

### **Margie Lynch, RI EERMC C-Team – Summary of Equity-Related Priorities for the 2024-2026 Plan**

Margie Lynch, a member of the Rhode Island EERMC Consultant Team, provided a summary of equity-related priorities for the Company's 2024-2026 Energy Efficiency Three-Year Plan. Margie outlined key opportunities for the RI EWG to further provide input on and support the Company, including setting clear and objective determinants of success and increasing investments in underserved communities and partner organizations. The EERMC C-Team recommended that the Company improve its metrics tracking and set annual targets.

**RI EWG Feedback/Comments:** Following the presentation, working group members were given an opportunity to ask questions and provide feedback. Discussion around the Company's Community Solutions Program were discussed concerning how it awards \$20,000 grants to organizations meeting energy efficiency goals. The Company has been working in East Providence with small businesses on Main Street. It was noted by an EWG member that Massachusetts has a similar initiative with its Community First Partners where partner organizations can receive up to \$60,000 each and must hire energy advocates for at least 10 hours/week to provide services to residents in underserved communities.

### **RI EWG Meeting #3 – August 31<sup>st</sup>, 2023**

To continue to hear from key stakeholders on equity-related work, GHHI invited Brendan Dagher, Rhode Island Energy, and Sonakshi Saxena, National Grid to present on the Company's Equity Demonstration and workforce development efforts in Massachusetts. Following the presentations, GHHI provided a brief overview of the emerging recommendations and suggested actions and metrics for discussion amongst the RI EWG.

**Brendan Dagher, Rhode Island Energy – Equity Demonstration:** Brendan provided an overview of the Company's proposed Equity Demonstration that is expected to launch in early 2024. The Equity Demonstration came about after realizing the number of non-profit organizations that are facing increased demands to provide energy efficiency education and outreach with no additional funding to support these efforts. In response, the Company will implement a demonstration to distribute \$40,000 in incentives to supporting organizations to provide direct education and outreach to landlords.

**RI EWG Feedback/Comments:** Following Brendan's presentation, working group members were given an opportunity to ask questions and provide feedback. A key piece of feedback revolved around the amount of funding available for the Equity Demonstration. EWG members suggested the Company to consider increasing the amount of funding available for these partners and/or energy advocates so they are able to provide strategic and robust efforts within underserved communities. In addition, allowing a longer time period was preferred as EWG members agreed that a one-year timeline is too short to build and implement an effective program.

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**Sonakshi Saxena, National Grid – MA Energy Efficiency Workforce Development Efforts:**

In Year 3, the RI EWG continued to focus on equitable workforce development and training throughout the state. GHHI invited Sonakshi Saxena to provide an overview of energy efficiency workforce development efforts happening in Massachusetts. Sonakshi shared a high-level overview of Massachusetts's current workforce development goals, including the need to consider workforce barriers to entry, language access, focusing on MWBEs and developing a more streamlined pathways to engage with MWBEs. Sonakshi spoke about the Clean Energy Pathways Program, similar to the Rhode Island Builder's Association Residential Construction Workforce Partnership (RCWP), which provides a full-time paid 3-month internship to help create a sustainable pipeline of HVAC and Weatherization workers residing in Environmental Justice communities.

**RI EWG Feedback/Comments:** Following the presentation, working group members were given an opportunity to ask questions and provide feedback. Regarding MWBEs, an EWG member was able to share her personal experience while trying to qualify with the state as an MWBE with her own business. The process was described as "insanely burdensome" to the point where she declined to pursue certification. Other EWG members were aware of similar experiences. The Company followed up as they are considering using self-attestation since many of the contractors they work with are minority or women-owned but decide not to pursue MWBE certification because of the burdensome process. EWG members liked the idea of self-attestation and are looking forward to future discussions to address this issue. In addition, the group discussed the importance of building trust within communities and working with trusted community-based organizations to increase participation in underserved communities. For additional feedback from Sonakshi's presentation, please refer to the Appendix.

**Draft Year 3 Matrix Review**

Following the presenters, GHHI walked through an initial draft matrix of recommendations, actions, and metrics that were developed based on input and feedback from the first couple of meetings. During the discussion, EWG members reiterated that it is difficult to develop recommendations and actions without better understanding baseline data and related metrics from the Company. Members continued to note that they have not seen the recommendations, actions, and metrics from Year 2 translated into the Equity Updates.

In thinking about how the Company can better share data, one member asked if there is any way the Company can dive deeper into the data to learn about programs in key geographies including Equity Communities, Justice 40 communities, and at the neighborhood level. The member noted that one issue with existing data is that data is very high level and is not detailed enough to use effectively to strengthen programming or monitor progress towards goals. In addition, the member asked if there is any type of pathway or mechanism for people who are directly affected by the Company's program to see and help analyze data to help the Company better understand the customer/consumer experience.

**RI OER – Equity Reporting Metrics**

Dollars saved (\$) in energy expenditures due to technology adoption in DAC	Energy saved or reduction in fuel by DACs	Avoided air pollutants (CO2 equivalents, NOx, SO2, and/or PM2.5) in DACs	Number of jobs created for DACs because of DOE program/Number of hires from DACs resulting from job trainings	Dollars spent (\$) and/or number of participants from DACs in job trainings programs, apprenticeship programs, STEM education, tuition, scholarships, etc.	Number of stakeholders events, participants, and/or dollars spent to engage with organizations and residents in DACs including participation and notification of programs	Change in air quality in BIPOC –F-LI communities	Reductions in asthma or respiratory distress	% Contracts awarded to frontline-owned businesses	% of households and communities that have access to reliable and sustainable energy sources
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Greg Ohadoma, Energy Justice Program Manager at RI OER shared the table above of equity reporting metrics that he put together for OER’s energy efficiency programs. These metrics were based on the Biden’s Administration’s Justice40 Initiative. Based on EWG member feedback, GHFI plans to incorporate suggested metrics into the final report.

**RI EWG Meeting #4 – September 29<sup>th</sup>, 2023**

On September 29<sup>th</sup>, the RI EWG reconvened for the 4<sup>th</sup> meeting of Year 3. During this meeting, Bryan Evans provided a high-level overview of the 2023 Matrix of Recommendations, including any input received throughout our EWG review/commenting period. The EWG then heard from the Company on its preliminary feedback on the 2023 Matrix, discussing what is feasible and what is not. EWG members were able to provide any additional feedback, concerns, and ask questions of the Company. Overall, the group was pleased with the Company’s in-depth responses to the 2023 Recommendations Matrix and look forward to continuing these discussions. Please refer to the Appendix for the Company’s slide deck detailing its responses.

**Suggested Recommendations, Actions, & Metrics**

The following section is a breakdown of draft Year 3 Recommendations, and suggested Strategies, Actions & Metrics. At the September 29<sup>th</sup> meeting, the Company presented its preliminary feedback on the suggested recommendations below, noting that they will continue work to further develop and refine the groups suggested metrics.

**Equity Issue/Challenge #1 – Participation Barriers**

The Company’s energy efficiency programs continue to see low participation rates among BIPOC residents and residents living within the five Equity Communities. As reported in the [Participation and Multifamily Census Study](#), non-participants in Rhode Island are more likely to be renters, have low-to-moderate incomes, and be non-English speakers. The [Nonparticipant Market Barriers Study](#) reported that 18% (43,304) of nonparticipants were from non-English speaking households. In addition, the Company reported out on its 2023 Q2 Equity Updates, that of the 14,614 emails sent to residents in the five equity communities, only 27 Spanish residents and 10 Portuguese residents clicked on the email to translate the contents of the email. Given the demographics of the five equity communities, the low participation from Spanish-speaking households needs to be improved through beneficial community-based partnerships. As discussed throughout meetings, community-based organizations are a trusted source within communities. For example, as reported in the Company’s 2023 Q2 Equity Updates, the City of Cranston stood out amongst the rest of the state with their participation numbers across

EnergyWise’s Home Energy Assessments and Weatherization participation, as well as for the IES Home Energy Assessment and IES Weatherization participation. This was mostly due to the city’s partnership with the local CAP agency, the Comprehensive Community Action Program (CCAP).

The RI EWG proposed the following to address participation barriers:

Year 3 Recommendation	Suggested Strategies to Implement Recommendation	Suggested Metrics	Suggested Targets
<p>1) Increase participation rates from residents living in the 5 Equity Communities across the EnergyWise and IES Programs</p> <p>2) Offer Home Energy Assessments (HEAs) in at least 4 languages other than English with the resulting Home Energy Reports translated in the household’s primary spoken language by the end of 2024</p>	<p>1) Build a network of X community-based partners that conduct marketing and outreach and provide programs and services in the 5 Equity Communities (or Justice 40/EJ Communities), with the majority of these partners being women or BIPOC-led. Adequate financial and other resources should be provided to help accomplish this goal.</p> <p>2) The Company needs to be more transparent on their energy efficiency marketing and outreach budget in its quarterly equity updates. Including this type of information will help EWG members better understand how certain strategies are funded, which in turn can help formulate solutions to redirect funding to underserved communities.</p>	<p>1) # of new partners                  2) # of referrals from CBOs/partners                  3) Increase # of participants who receive a HEA in Spanish &amp; Portuguese by X%                  4) Increase # of participants who receive Wx after receiving a HEA in Spanish or Portuguese by X%                  5) Increase # of participants in EJ Communities by X%                  6) # of Participants residing in Environmental Justice communities vs. Non-EJ communities                  7) # of stakeholder events vs # of stakeholder events in EJ communities                  8) Incentives spent in EJ vs non-EJ communities                  9) # of Participants broken down by income, race, primary language, etc.                  10) % of eligible customers reached at events                  11) # of HEA customers that learned about or signed up at an outreach event in each outreach service area                  12) % of marketing and education interactions w/ customers mirrors the % distribution of customer groups                  13) # of HEAs in languages other than English                  14) # of participants broken down by primary household language</p>	<p>1) Establish partnerships with 1-2 CBOs in each of the EJ Communities to increase participation by underserved populations, including BIPOC households, renters, and lower income households. Quarterly Equity Updates must include meaningful data, including amount of funding for each partner, # of trainings/outreach events, uptake in participation rates, etc.</p> <p>2) Through improved outreach in equity communities, reach a total of 850 new households                  3) 5% of eligible customers reached at events                  4) 40% of outreach events conducted in EJ communities)                  5) 5-25 HEA customers learned about or signed up at an outreach event in each outreach service area                  6) % of marketing and education interactions w/ customers mirrors the % distribution of customer groups</p>

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Equity Issue/Challenge #2 – Multifamily Barriers

Multifamily housing has always been a difficult area for energy efficiency program implementers to reach due to a variety of barriers. With barriers like the split incentive, it causes challenges for program implementers to work through and reach both landlords and tenants. The RI EWG proposes the following to address multifamily participation barriers:

Year 3 Recommendation	Suggested Strategies to Implement Recommendation	Suggested Metrics	Suggested Targets
<p>1) Increase participation rates among EnergyWise Multifamily and Income Eligible Multifamily Programs statewide, with a focus on the 5 Equity Communities and/or Justice 40/EJ Communities.</p> <p>2) Increased focus on renter-specific resources, including but not limited to information on what is available for renters and renter-friendly DIY home improvements that can cut down on energy use. While noted that it can be difficult to distinguish who is a renter or owner at the property level, the Company should investigate ways to better track this</p>	<p>1) Develop a strategic plan with landlords/MF property owners with detailed examples of how The Company will serve and reach MF landlords (including partnership ideas)</p> <p>2) Continue to work with the RI EWG to support the Equity Demonstration, including next steps regarding the application process, etc.</p> <p>3) Leverage additional funding to increase the pool of funds available for partnering community-based organizations (CBOs) under the Equity Demonstration</p> <p>4) Partner with tenant-rights organization (e.g., Reclaim RI) to develop resources and better reach tenants</p> <p>5) Coordinate with RIDOH on the development of a rental registry (this was legislation passed that requires landlords to register certain information on a statewide registry &amp; for pre-1978 properties, to provide a valid certificate of conformance with the Lead Hazard Mitigation Act.</p>	<p>1) Finalized MF/Landlord Outreach Strategy</p> <p>2) # of landlords reached</p> <p>3) # of renters reached</p> <p>4) # of new areas of feedback</p> <p>5) # of customers providing feedback</p> <p>6) # of points of contact before participation</p> <p>7) # of new MF participants</p> <p>8) # of new MF participants/demo \$ spent</p> <p>9) Total associated customer energy savings (\$)</p> <p>10) Conversion rate of contacts to participants (%)</p> <p>11) \$ spent on renter populations/landlord engagement</p> <p>12) Incentives spent on rental properties vs. ownership properties (separate for SF and for Condos)</p> <p>13) # of landlord EE workshops</p>	<p>1) 5-10 Referrals per month from supporting CBOs</p> <p>2) Develop &amp; Finalize a MF/Landlord Engagement Strategy w/ support from the RI EWG</p> <p>3) Host Quarterly (at minimum) Landlord Workshops</p> <p>4) Identify Flexible Funding Pool for Supporting CBOs &amp; Other Potential Needs</p> <p>5) Increase renter participation by 20%</p>

Equity Issue/Challenge #3 – Pre-Weatherization Barriers

One of the major topic areas of discussion surrounded the issue of pre-weatherization barriers. RISE Engineering reported of the 11,930 homes receiving assessments, 41 percent of houses received weatherization services. In the EnergyWise (market rate) Program, 9,251 households were assessed, and 45 percent (4,143) were weatherized. In the IES program, 2,679 homes were assessed, and 28 percent (758) were weatherized. Housing conditions (mold, structural issues, etc.) are a common source of deferral from Weatherization programs, particularly for low and moderate-income households, and must be addressed to close disparities in the Home Energy Assessments to Weatherization conversion rate between market rate and low/moderate-income programs. Noted by the Company, the market rate programs had a 45 percent conversion rate, while the Income Eligible Services program had a 28 percent conversion rate. The RI EWG proposes the following to address multifamily participation barriers:

Year 3 Recommendation	Suggested Strategies to Implement Recommendation	Suggested Metrics	Suggested Targets
1) Close the gap in the Conversion to Weatherization ratio between EnergyWise and IES programs by XX% over the next XX months 2) Continue to leverage and provide additional funding for pre-weatherization barrier remediation 3) Engage with the new State Department of Housing, cities/towns code officers, and/or housing courts. Better coordination between agencies can potentially address the pre-Wx issue.	1) Strategically align, braid, and leverage additional Home Repair, Healthy Homes, Lead Hazard Control, and other programs to address housing conditions that result in Wx deferrals to get more homes weatherization ready (aka whole house strategy. GHFI happy to explore partnership re: HUD HHP Program). 2) Work with partners to explore and secure new sources of housing rehabilitation funding (e.g., RGGI, US DOE) that can be used to make units weatherization (and ultimately electrification) ready. 3) Compare follow through rates by geographic area, income level, and other factors (e.g., language). This can help inform how new funding that is identified is allocated to high-need areas/communities.	1) Energy saved or reduction in fuel use 2) \$ saved in energy costs due to Wx and adoption of EE measures 3) % of cases with Wx issues resolved 4) % of eligible customers participating in HEAs 5) % resolution of pre-Wx barriers 6) % conversion from HEA to Wx 7) % of total energy savings benefitting residential customers in EJ communities 8) year by year increase in energy savings benefitting customers 9) New funding (\$) available to address pre-Wx barriers	1) Achieve 35-45% Resolve Rate for Pre-Weatherization Barriers across the EE Program Portfolio (The EERMC C-Team recommended the desired goal of 35% Resolve Rate to be higher) 2) 20% of eligible customers participate in Home Energy Audits (HEAs) 3) 50% conversion rate from HEA to Wx (for those in which Wx is identified) 4) 40% of total energy savings benefitting residential customers in EJ communities 5) Total quantity (\$#) of energy savings to customers increase by 15% from previous year

Equity Issue/Challenge #4 – Workforce Development & Training

As in previous years, the RI EWG continued to have discussions and develop recommendations for the Company on equitable workforce development and training opportunities. Reported in the E4theFuture Report, [Energy Efficiency Jobs in America](#) (2022), it was reported that for Rhode Island's energy efficiency workforce, white males make up over 77% of the workforce while Hispanic, Black, and Asian workers make up 15.9%, 6.5%, and 4.8%, respectively. In addition, women only make up 23% of the EE workforce in Rhode Island.

The RI EWG proposes the following to address workforce development opportunities, and opportunities to better serve and work with Minority and Women-Owned Business Enterprises (MWBEs) to equitably grow and diversify the workforce that better reflects the communities that it serves.

Year 3 Recommendation	Suggested Strategies to Implement Recommendation	Suggested Metrics	Suggested Targets
<p>1) Increase the % of BIPOC workforce training participants and contractors that reside in the 5 Equity Communities (or Justice 40/EJ Communities) year over year by XX%</p> <p>2) Increase # of and capacity of minority contractors by XX% in 2024 (multi-year targets...)</p> <p>3) Increase the # and size of contracts awarded to MWBEs who conduct energy audits and weatherization services by XX% in 2024.</p>	<p>1) Host biannual workshops for contractor businesses in order to increase availability and support for vendors to become certified MWBEs</p> <p>2) Connect w/ the Division of Equity, Diversity, &amp; Inclusion to assess and address MWBE certification barriers</p> <p>3) Continue to fund workforce development partnerships (e.g., the Residential Construction Workforce Partnerships)</p> <p>4) Study the success in achieving retention in both training and job placement within the RCWP to ensure program effectiveness and address barriers</p> <p>5) Assess the Company's relationship with minority/women-owned business firms to better understand how the Company could potentially benefit these firms so they are not left behind</p>	<p>1) # of contracts awarded to MWBEs compared to the total # of contracts awarded overall</p> <p>2) \$ spent on MWBE contracts vs \$ spent overall on all contracts</p> <p>3) % of jobs by MWBEs,</p> <p>4) Size of jobs for MWBEs vs Non MWBEs</p> <p>5) Through RIBA's RCWP, report on the following:</p> <ul style="list-style-type: none"> <li>- # of graduates employed with the CAP agency</li> <li>- Demographics of participants/graduates (income, race, location, etc.)</li> <li>- # of jobs created</li> <li>- \$ spent on workforce offerings</li> <li>- # of participants from EJ communities in EE-related job trainings, programs, apprenticeships, STEM education, tuition, scholarships, etc.</li> </ul>	<p>1) 5-10 individuals trained in each outreach service area with a focus on EE, incoming rebates/incentives, etc.)</p> <p>2) Increase # of Wx/EE jobs by 15%</p> <p>3) 20% of total Wx jobs performed by MWBEs</p>



Equity Issue/Challenge #5 – Microbusinesses and Small Businesses

While the RI EWG was not able to dive deep into discussions around microbusinesses and small businesses, GHHI and RI EWG members were able to briefly discuss the topic. The EERMC Consultant Team recommended that the Company and the RI EWG need to have a better understanding of this information so the Company can better reach underserved populations and develop strategies to support these businesses.

Year 3 Recommendation	Suggested Strategies to Implement Recommendation	Suggested Metrics	Suggested Targets
1) Leverage findings from the 2023 Small Business Process Evaluation to improve program strategy 2) Conduct Main Street efforts in all five communities identified in the 2024-2026 EE Plan Narrative 3) Develop translated program materials, as suggested in the SBDI Process Evaluation	1) Increase the number of Main Street efforts conducted in zip codes with lower historical participation. 2) Include efforts to serve small businesses as part of the new Community-based initiative (currently slated to provide \$40,000 in funding to a limited number of communities). In addition, expand this initiative to include more communities by increasing funding allocated to participating communities. 3) Retain financing offers for small-business customers to overcome upfront cost barriers (the latest 2024 Plan seemed to remove funding for C&I Financing) 4) Make concerted efforts to increase participation in programs by MWBE contractors, as suggested above in the recommendation on Workforce Development 5) Continue to seek multilingual staff in all aspects of program implementation, including increasing compensation to reflect linguistic skills. 6) Translate all program materials (e.g., rebate forms) to languages other than	1) Total eligible SBDI customers by zip code or census tract 2) SBDI participation by zip code or census tract 3) Unique C&I customer accounts by consumption category (e.g., less than 250,000 kWh, 250,000-500,000 kWh...) 4) C&I participation by consumption category (e.g., less than 250,000 kWh, 250,000-500,000 kWh...) 5) Number of RI Energy and RI Energy vendor staff that speak languages other than English with prevalence in RI (disaggregated by language) 6) Total SBDI participation by customers who report to speak languages other than English	1) The goal for participation in underserved zip codes should at least match historical participation rates in communities that have been well-served and benefitted from program offerings (this is a range, but the Small Business Process evaluation suggests that the most well-served communities have participation from 6.1% up to 14.3%. 2) Target is more qualitative in nature, in that the goal is to have program staff and resources that can support customers who speak all common languages in the state. 3) If the total number of small-business customers who speak languages other than English is known, then the

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	<p>English which have high prevalence in underserved communities. If available, leverage tools like artificial intelligence to support this work (papercup.com is an AI-driven tool that can translate videos into several languages, and there are many tools that can be used to translate text).</p> <p>7) Provide language access services, support, and materials during Main Streets</p>		<p>goal should be at least 3%. If the total number is unknown, then the focus should be on expanding language access through translated materials, customer phone lines, and multilingual program staff/vendors.</p>
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Equity Issue/Challenge #6 – Metrics Tracking & Reporting

Based on RI EWG member feedback, the Company continues to struggle with tracking meaningful metrics concerning customer interactions and progress toward energy efficiency goals. To better share progress over time and identify issues and solutions, members agreed that the Company must develop a suite of key equity-related metrics, including baseline data and targets that can help the Company set ambitious, yet tangible goals. Supporting quarterly Equity Update reports can provide the percentage achieved towards the goal and allow EWG members to see the impact of the work being done. EWG members also recommended to present and categorize the energy efficiency data in the quarterly Equity Updates by geographic area that have more meaning than CDPs or zip code. This can include breaking down data by outreach area, for example the local CAP agency or by Environmental Justice vs non-Environmental Justice areas. There have been great results from CAP agencies that the EWG can learn from, specifically in Cranston concerning elevated participation rates. The RI EWG proposes the following to improve metrics tracking and reporting:

Year 3 Recommendation	Suggested Strategies to Implement Recommendation	Suggested Metrics	Suggested Targets
<p>1) Through Q4 2023, work with the RI EWG and the Company to come to an agreement on 2024 metrics and targets the Company can commit to tracking and achieving.</p>	<p>1) Develop and share a data and metrics reporting template/dashboard to better track progress (e.g., side by side comparisons to highlight conversion rates, increase/decrease of participation over time and across geographic area, etc.).</p> <p>2) Share the equity updates quarterly with key stakeholders</p>	<p>1) A finalized set of 2024 targets and metrics by end of Q1 2024</p>	<p>At least 4 updates per year (quarterly updates)</p>

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## Conclusion & Future Direction

Throughout Year 3, a common theme among RI EWG members was the need to improve tracking and reporting of equity-related metrics from previous years. Members would like to see more timely and sophisticated data collection and reporting in the quarterly Equity Updates that can be used to catalyze discussions, promote target setting, and monitor progress. One workgroup member stated that they “expect to see more specific, measurable commitments which the Company intends to undertake...metrics should be established for each commitment which are quantifiable, time-bound, and supported by reporting data and other relevant information.” Desired sources of data include hearing directly from the Company’s Consumer Advocates on current activities they are working on and any learning from barriers or opportunities they see in their day-to-day work. This would, in turn, help members better formulate solutions to address ongoing barriers. It is strongly recommended by GHHI and EWG members that the group meet at least one more time this year to continue discussions on equity metrics and targets the Company can commit to. GHHI and EWG members understand that the current draft of 2024 Annual Energy Efficiency Plan outlines that metrics development will begin in Q1 of 2024, with a first report out in the 2024 Q2 Equity Update report. However, we would like to acknowledge that this timeline may stall the EWGs current momentum as it is eager to continue work building on the suggested metrics developed during this process. In addition, having solid baseline data early in Q1 would support EWG-related planning moving into the new year.

With the Company committed to at least six EWG meetings in 2024, GHHI and RI EWG members strongly urge we kickoff Year 4 early in the calendar year. This will allow for ample time for the group to meet its goals and have sufficient time for EWG members to provide feedback on the recommendations and final report. EWG members have expressed interest in working closely with GHHI and the Company to map out Year 4, prioritize topic areas for discussion, and set agendas and meeting goals throughout the year. One suggestion from the EERMC C-Team involved developing a detailed calendar for Year 4 by the end of 2023 that outlines proposed activities and a specific timeline for next year’s recommendations and final report. To ensure that RI EWG members have the opportunity to review and provide feedback, Year 4’s final report and recommendations should be carefully aligned with the development of the first draft of the 2025 Energy Efficiency Plan.

GHHI would value the opportunity to continue to work with the Company, RI OER, and workgroup members to increase participation and representation from consumers who are not affiliated with any specific organization but have personal experiences that can help the EWG better understand issues and challenges facing community members who wish to avail themselves of the Company’s energy efficiency programs and services. Notably, to date, no one has taken advantage of the stipends offered for members who are not otherwise paid to participate in the RI EWG. The Company’s Consumer Advocates could be a major asset in this effort.

GHHI invited a handful of residents, including low-to-moderate income renters, and presented at Health Equity Zone meetings to discuss the RI EWG, its goals, and help recruit more residents to the group. GHHI has also offered meeting times that start after the workday (e.g., 5:30-7 PM), however, the later times have not proven to be popular. While considering how to recruit and retain consumer participation, GHHI will discuss with the Company the possibility of hosting a second group of residents after work hours or increasing the presence of the Company at monthly/quarterly Health Equity Zones meetings to build trust and make connections with community members and leaders.

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Lastly, RI EWG members will continue to be asked to provide referrals and recommendations for stakeholders and organizations to join the group. GHHI looks forward to connecting with any new invitees and provide them with a brief orientation and background materials so new members feel comfortable and are up to speed on the work.

GHHI and RI EWG members value the opportunity to provide feedback and recommendations to the Company's energy efficiency efforts with a focus on equity and look forward to continuing these discussions throughout the remainder of 2023 and through 2024. Lastly, reiterated throughout Meeting #4, the RI EWG can be seen as a leader in this space of advancing equity within utility energy efficiency program portfolios. A look across the nation reveals that there is no consistent or standard approach to equity reporting and The Company and the EWG should take this as an opportunity to be a leader in the space. The EWG looks forward to continuing working with the Company to set Rhode Island ahead and advance equity in the state.

## Acknowledgements

The Green & Healthy Homes Initiative (GHHI) would like to thank:

- All the Rhode Island advocates that have continuously pushed the Company to develop, implement, and deliver their energy efficiency programs more equitably.
- The Company and the Rhode Island Office of Energy Resources (OER) for co-hosting and their commitment to the RI Equity Working Group.
- Each of the EWG members for their participation and engagement during the process.
- Those who presented their work and other non-EWG members that devoted time to providing their perspective.

## Appendix

### About GHHI

The Green & Healthy Homes Initiative (GHHI) is a national organization with the mission dedicated to addressing the social determinants of health and the advancement of racial and health equity through the creation of healthy, safe and energy efficient homes. By delivering a standard of excellence in its work, GHHI aims to eradicate the negative health impacts of unhealthy housing and unjust policies for children, seniors, and families to ensure better health, economic and social outcomes for low-income communities of color. The vision of our work is to advance health and racial equity through healthy housing, with a focus on limited-income communities of color.

GHHI is the largest healthy homes organization in the country, operating in over sixty-five communities and states, focused on improving housing quality and establishing public-private partnerships that allow local governments to efficiently and effectively utilize resources related to housing. GHHI has worked to design and implement policies and programs at the federal, state, and local level that promote healthy, energy efficient, and climate friendly housing. In Rhode Island, GHHI aligns and braids housing, health, and energy efficiency resources to offer a holistic set of services to meet the housing needs of families

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and children, offers healthy homes training for Spanish-speaking contractors in partnership with the Rhode Island Builders Association, manages HUD's Lead Hazard Control Grants for Rhode Island Housing and the City of Providence, partners with the West Elmwood Health Equity Zone team to deliver a 4-unit pilot to reduce the number of asthma-related pediatric and adult emergency department visits and inpatient hospitalizations in the 02907 region.

### EWG Guidelines and Expectations

Below are the guidelines and expectations that guided each EWG meeting. Meeting attendees shall:

- Make every attempt to attend every meeting on time
- Share the oxygen – ensure that all participants who wish to have an opportunity to speak are afforded a chance to do so
- Listen to other points of view and try to understand differing viewpoints and other interests
- Maintain a focus on collaboration and solutions
- Share information openly and respectfully
- Make sure information given is accurate
- Remain flexible and open-minded
- Review meeting notes and documents prior to next meeting
- Respect the privacy of the meeting
- Meeting notes are for participants only
- What is said during meetings is important, who said it is not
- Make sure information given is accurate
- Remain flexible and open-minded.

[Year 3 RI EWG Meeting #1 – Slide Deck](#)

[Year 3 RI EWG Meeting #1 – Meeting Notes](#)

[Year 3 RI EWG Meeting #2 – Slide Deck](#)

[Year 3 RI EWG Meeting #2 – Meeting Notes](#)

[Year 3 RI EWG Meeting #3 – Slide Deck](#)

[Year 3 RI EWG Meeting #3 – Meeting Notes](#)

[Rhode Island Energy 2022 Q4 Equity Update](#)

[Rhode Island Energy 2023 Q2 Equity Update](#)

[Rhode Island Energy Equity Demonstration - Slide Deck](#)

[RI EERMC Consultant Team – RI EWG Year 3 Memo](#)

[Acadia Center – RI EWG Year 3 Memo](#)

[Rhode Island Energy – Preliminary Responses to the 2023 Matrix of Recommendations](#)



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# 2023 Rhode Island Energy Efficiency Equity Working Group Report

Supporting Attachments



# Rhode Island Equity Working Group (RI EWG) Year 3 Kickoff Meeting

June 21, 2023



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## RI EWG Year 3 Kickoff Meeting Agenda

1. Welcome & Introductions
2. Purpose of RI EWG & Timeline
3. Partner Update:
  - Greg Ohadoma: Energy Justice Manager, RI Office of Energy Resources
4. Years 1-2 Debrief
  - Matthew Maini: Energy Fellow Intern, Rhode Island Energy
5. Member Input





# Meeting Logistics

- All meetings will take place over Zoom
- All meetings will be recorded for notes purposes
- Stay muted when you are not speaking
- If you have a question or comment, you can:
  - Post it in the chat
  - Raise your hand
  - Post “stack” into the chat to indicate your willingness to speak
- Please rename yourself to include your name, pronouns, and organization/affiliation



## About Green & Healthy Homes Initiative

- Vision: Advancing racial and health equity and opportunity through healthy housing.
- Mission: The Green & Healthy Homes Initiative is dedicated to addressing the social determinants of health and the advancement of racial and health equity through the creation of healthy, safe and energy efficient homes. By delivering a standard of excellence in its work, GHHI aims to eradicate the negative health impacts of unhealthy housing and unjust policies for children, seniors and families to ensure better health economic and social outcomes in low-income communities of color.
- Operating Value: Ensuring racial equity in all policies, practices and actions





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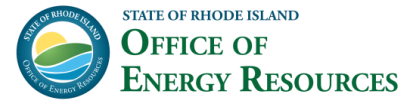
## Rhode Island Energy and Rhode Island Office of Energy Resources

- Rhode Island Energy



We're committed to providing reliable electricity and gas to every community we serve throughout the state — in all the places we call home — while working to help Rhode Island meet its ambitious renewable energy goals over the next decade.

- Rhode Island Office of Energy Resources (OER)



Our mission is to lead the state toward a clean, affordable, reliable, and equitable energy future.

OER develops policies and programs that respond to the state's evolving energy needs, while advancing environmental sustainability, energy security, and a vibrant clean energy economy.

OER is committed to working with public- and private-sector stakeholders to ensure that all Rhode Islanders have access to cost-effective, resilient, and sustainable energy solutions.



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## Equity Working Group Guidelines and Expectations

- Meeting attendees shall:
  - Make every attempt to attend every meeting on time
  - Share the oxygen – ensure that all participants who wish to have an opportunity to speak are afforded a chance to do so
  - Listen to other points of view and try to understand differing viewpoints and other interests
  - Maintain a focus on collaboration and solutions
  - Share information openly and respectfully
  - Make sure information given is accurate
  - Remain flexible and open-minded
  - Review meeting notes and documents prior to next meeting
  - Respect the privacy of the meeting
  - Meeting notes are for participants only
    - What is said during meetings is important, who said it is not
- We will be seeking feedback from other stakeholders outside of this EWG. These are individuals/organizations that were not able to commit to participate in a series of meetings.



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## Equity Working Group Stipends

Stipends are available and intended for individuals who are not otherwise paid to participate. Please contact Bryan ([bevans@ghhi.org](mailto:bevans@ghhi.org)) if you require a stipend.





## Introductions & Ice Breaker

- State your Name, Title, and Organization
- Where are you located?



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## Purpose of the RI Equity Working Group

- The Rhode Island Equity Working Group (RI EWG) will give impacted communities, and the organizations that serve them, a structured opportunity to provide input and feedback on equity for the planning, design, and delivery of the residential and income-eligible energy efficiency programs.
- Developed out of discussions from the 2021-2023 Energy Efficiency and Demand Response planning process
- Desired outcomes of RI EWG:
  - Offer a list of prioritized recommendations to be considered for inclusion in the 2024 Annual Plan
  - Action Items from Years 1-2 Recommendations





Greg Ohadoma  
Climate Justice  
Manager, RI Office of  
Energy Resources

[greg.ohadoma@energy.ri.gov](mailto:greg.ohadoma@energy.ri.gov)





## RI EWG Years 1-2 Overview

### Year 1: Priority Recommendations

1. Hire multilingual staff and partner with trusted leaders who have the same ethnic background and that frequent popular community gathering places
2. Benchmark EE Program participation data for race, geography, socioeconomic status, language, age of home, age of owner/renter, heating fuel type, type and age of heating/cooling/hot water systems
3. Develop multilingual marketing and outreach materials
4. Partner with other home-visiting programs to expand the reach and impact of RIE's energy efficiency programs
5. Reduce barriers to professional development, as well as entry into the workforce

### Year 2: Priority Recommendations

1. Promote energy efficiency at community gathering places
2. Provide enhanced outreach, promotion, and education of all energy efficiency offerings in underserved communities
3. Partner w/ and cross-train other home visiting programs and other community organizations/resource groups to further expand the reach and impact RIE's energy efficiency programs
4. Continue to explore opportunities to support innovative education programs, helping to revitalize neighborhoods and fostering the development of the future workforce
5. Develop recruitment material and explore opportunities for participation in local career fairs and partnerships with local trade schools, vocational programs, and community organizations
6. Complete an internal needs assessment across all departments to determine opportunities for internships, mentorships, or job shadowing

Rhode Island  
Energy – 2022  
Q4 Equity  
Updates



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**Energy™**

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## Member Input

- For current and new members, what do you hope to get out of this group?
- What are concerns you see or hear regarding cooling/heating needs & energy efficiency programs in Rhode Island?
- Are there any pressing topics in energy efficiency and equity that you would be interested in exploring this year?



## Wrap Up & Next Steps

- **Next Meeting Date:** End of Summer TBD
- **Next Meeting Topic:** TBD – send any suggestions!
- **RI EWG Updates:**
  - GHHI
  - Rhode Island Energy
  - RI OER
  - Member Update?



If you have any questions or comments, feel free to reach out to Bryan Evans ([bevans@ghhi.org](mailto:bevans@ghhi.org)) or Bert Cooper ([bcooper@ghhi.org](mailto:bcooper@ghhi.org))

**Rhode Island Energy Efficiency Equity Working Group (RI EWG) – Year 3 Kickoff**  
**Meeting Date: June 21, 2023, 2:30-4:00 PM**

**First Meeting Agenda:**

- Welcome & Introductions
- Purpose of RI EWG & Timeline
- Partner Update: RI OER: Greg Ohadoma
- Years 1-2 Debrief
- Member Feedback

**Meeting Attendees:**

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>• Bert Cooper, GHHI</li> <li>• Ruth Ann Norton, GHHI</li> <li>• Catherine Lee, GHHI</li> <li>• Steven Chybowski, RI OER</li> <li>• Greg Ohadoma, RI OER</li> <li>• Matt Maini, Energy Fellow Intern at Rhode Island Energy</li> <li>• Spencer Lawrence, Rhode Island Energy</li> <li>• Brenda Clement, HousingWorks RI</li> </ul> | <ul style="list-style-type: none"> <li>• Garry Bliss, Prospect Health Systems Medicaid AE</li> <li>• Dayanarah Baez, CAPP</li> <li>• Margie Lynch, On the Consultant Team for the EERMC</li> <li>• Margarita Robledo, RIBA</li> <li>• Jordan Galluzzo, Energy Fellow Intern at Optimal Energy</li> <li>• Karen Verrengia, CLEAResult</li> <li>• Emily Koo, Acadia Center</li> <li>• Rachel Calabro, RI DEM</li> </ul> |
|--|---|

**Meeting Notes:**

Stipends: We are offering stipends for each meeting for individuals who are not otherwise paid to participate in working group meetings. Please reach out for any questions and if you would like to inquire more about the stipend.

RI Energy Efficiency Equity Working Group: The purpose of the Equity Working Group is to provide Rhode Island Energy with recommendations on incorporating equity in the planning, design, and delivery of its Energy Efficiency Programs. The intended goal was to give impacted communities and the organizations and people who serve them - an ongoing, structured opportunity to collaborate and provide input and feedback for their energy efficiency program portfolio. In turn, Rhode Island Energy would take the final report of recommendations we submit and use them to propose changes to their programs or develop new programs and services to better reach their customer base all throughout Rhode Island.

- **Year 3 Key Outcomes:** The key outcome will be a new set of prioritized recommendations to be included in RIE's Annual Energy Efficiency Plan for 2024. In addition, Rhode Island Energy will also be updating the EWG on the progress of Year 1 and 2 recommendations, where additional input from working group members will be provided.

Partner Update: Greg Ohadoma, Energy Justice Manager from the RI Office of Energy Resources briefly spoke about his role. His role is to help his office implement and include equity and justice in existing and future policies and programs. In addition, Greg helps facilitate the Climate Justice Hours group,

which helps bring together stakeholders to have honest and open conversations about achieving climate justice in Rhode Island. Feel free to reach out to Greg at [greg.ohadoma@energy.ri.gov](mailto:greg.ohadoma@energy.ri.gov)

#### RI EWG Years 1-2 Overview:

Bryan Evans began with an overview of Years 1-2 recommendations (pictured below). To learn more about how each recommendation was created and prioritized, report to the Year 1 & Year 2 RI EWG Reports.

#### **Year 1: Priority Recommendations**

1. Hire multilingual staff and partner with trusted leaders who have the same ethnic background and that frequent popular community gathering places
2. Benchmark EE Program participation data for race, geography, socioeconomic status, language, age of home, age of owner/renter, heating fuel type, type and age of heating/cooling/hot water systems
3. Develop multilingual marketing and outreach materials
4. Partner with other home-visiting programs to expand the reach and impact of RIE's energy efficiency programs
5. Reduce barriers to professional development, as well as entry into the workforce

#### **Year 2: Priority Recommendations**

1. Promote energy efficiency at community gathering places
2. Provide enhanced outreach, promotion, and education of all energy efficiency offerings in underserved communities
3. Partner w/ and cross-train other home visiting programs and other community organizations/resource groups to further expand the reach and impact RIE's energy efficiency programs
4. Continue to explore opportunities to support innovative education programs, helping to revitalize neighborhoods and fostering the development of the future workforce
5. Develop recruitment material and explore opportunities for participation in local career fairs and partnerships with local trade schools, vocational programs, and community organizations
6. Complete an internal needs assessment across all departments to determine opportunities for internships, mentorships, or job shadowing

Matthew Maini followed up with providing an update from Rhode Island Energy on Q4 2022 Updates.

- Improved Outreach & Marketing:
  - o RIE has created new fliers, email templates, and mailers for energy efficiency outreach with a focus on home energy assessments and more in-depth information on how to identify which program customers can qualify for and how to participate. These fliers were translated into English, Spanish, and Portuguese. These have been shared with the CAP agencies, and have been distributed to libraries, senior centers, community centers, etc.
    - Home Energy Assessment Email: 50.3% open rate
      - 105 customers clicked to read in Spanish or Portuguese, which is .52% of customers who opened the email
    - Income-Eligible Energy Efficiency Email: 47.3% open rate
      - 8 customers clicked to read in Spanish or Portuguese, which is .45% of customers who opened the email
  - o RIE has also developed more age-appropriate marketing strategies to connect with various age groups and utilizing social media, apps, and texts.
  - o RIE is working with East Providence on a Community Initiative with the primary focus to engage with small businesses and organizations to promote and distribute energy efficiency program resources for residents of East Providence.
- RIE Consumer Advocates Training
  - o Completed & Ongoing, the Consumer Advocates were provided with more information and training on energy efficiency offerings and will continue to train and hire new advocates.
  - o With these trainings, the Consumer Advocates will have increased knowledge of available programs and services for when they perform outreach at community gathering place and lower-income communities.
- Align EE programs with healthcare programs and services

- RIE partnered with the RI Department of Health to provide training and materials for their staff who provide in-home services for clients so they can speak to the additional health benefits of weatherizing their homes and refer clients to their home energy assessment vendors (CLEAResult & RISE)
- Vendor Call Centers
  - RIE has provided their vendor call centers with scripts on how to answer any questions from customers/landlords on energy efficiency needs and services.
- Improved Customers Follow Up
  - RIE committed to improving follow-up outreach for customers who receive a recommendation from the online home energy assessment, in-home/virtual home energy assessment, and/or home energy reports. A follow-up email and postcard were sent to customers who were identified as good candidates for a heating or water heating upgrade
- Improve Data Collection & Tracking
  - In addition to completing the Participant, Nonparticipant, and Multi-Family Census studies, RIE also created a regular, zip-code level participation report to help target outreach for the EnergyWise, MF, and Income-Eligible Single-Family programs. If interested in seeing this data, let us know!
    - Through Q4 of 2022, 12% of assessments and 11% of weatherization participants are renters/landlords.
    - For income-eligible SF, 30% of the assessments are for renters and 15% of weatherization participants are renters/landlords.
- Workforce Development:
  - RIE has begun a RI Workforce Needs Assessment with BW Research. BW Research has created 3 surveys (Potential workforce survey, current worker survey, and employer survey) with input from RIE and OER. Surveys should have been sent out in the Spring of 2023. The results will help determine opportunities for new trainings, new recruitment and upskilling efforts, etc. with a focus on diversity.

Member Input/Feedback:

During the final portion of the meeting, we asked working group members the following questions to gain some feedback and input on possible hot-button issues they would like to dive deeper into or feedback on the RI EWG process. Questions outlined below:

1. For current and new members, what do you hope to get out of this group?
2. What are concerns you see or hear regarding cooling/heating needs & energy efficiency programs in Rhode Island?
3. Are there any pressing topics in energy efficiency and equity that you would be interested in exploring this year?

Outlined below are summarized responses from a handful of working group members. **Please note, responses from Rhode Island Energy (RIE) on the right-hand side were provided after the kickoff meeting. In the future, RIE will be present at all meetings to ensure adequate responses and actions from the RIE team.**

Meeting Notes & Feedback	Rhode Island Energy Response
More accountability and updates from Rhode Island Energy on previous commitments. Working group members stated they would like to have more input	RIE will report on Q2 metrics in the Second Quarter report to the PUC which will come out this August.

Schedule B

<p>on previous recommendations and any potential solutions to remediate ongoing barriers.</p> <p>One member would appreciate more side-by-side comparison of the EWG recommendations from Years 1-2, and highlighting any improvements or implemented measures from the recommendations.</p>	
<p><b>Air-Source Heat Pumps:</b>          A working group member stated that they see a lot of heating/cooling needs through the EE programs in regard to air-source heat pumps. They are doing a lot of education for anyone from homeowners, renters, or contractors.</p> <p>We need more education on this for homeowners, renters, and contractors. The concern is that we are moving toward pushing a large number of heat pumps in new constructions and retrofits, but not hearing a lot on the grid’s ability to handle increased demand.</p>	<p>OER’s Heat Pump program will assist with this education since it will support more customers in RI. RIE will focus on electric resistance customers that can be upgraded to electric heat pumps. The Company has also submitted a three-year <b><u>Electric Resistance Heating to Air Source Heat Pumps: Implementation Plan for the Income-Eligible Sector</u></b></p> <p>There is also a RIE portal that highlights constrained areas.  <a href="https://www.rienergy.com/Business-Partners/RI-System-Portal">https://www.rienergy.com/Business-Partners/RI-System-Portal</a></p>
<p>The low-income SF/MF and market-rate MF programs in RI have been struggling to achieve their goals – and these programs are capturing the most vulnerable residents of RI.</p> <p>We need a better understanding of why the IES programs and EnergyWise Multifamily market rate program have been struggling to achieve their goals. It would be great to get more stakeholder input for specific strategies to improve productivity and goal setting, as well as hear about why these programs are struggling from program administrators. The EWG is a great place to dive deeper and explore these issues – such as the split incentive.</p>	<p>These programs would benefit from increased attention from the EWG.</p> <p>Please see the table below provided by RIE with a summary of customers served between EnergyWise, the market rate program, and the comparable income-eligible services program. IES actually services a larger percentage of eligible customers (6.9% income eligible vs 2.3% of market rate). Weatherization rates are comparable. IES has a lower conversion rate (moving from assessment to weatherization) due to the lengthy time required to overcome pre-weatherization issues that much be addressed in a customer’s home before weatherization can proceed. IES goals need to be aligned with potential study goals. From the Market Potential Study research, IES is actually addressing more of the potential savings than market rate. Although there is a lot of attention to IES not meeting the goals, there needs to be an understanding that as many or more income-eligible customers are</p>



Schedule B

	being served proportionately by the EE programs.
Emily Koo asked members if there were any advocates that were planning to provide written comments on the 3-Year Energy Efficiency Plan. While the first commenting period for that closed last week – there will be more opportunities to comment soon. Reach out if you are interested in meeting with a smaller group at a later time.	
Margie Lynch asked about the scope of the EWG and was curious about any discussions as it relates to commercial and industrial customers. The Massachusetts Equity Working Group has studied non-participation in small/micro businesses – and these businesses participate in EE programs at a significantly lower level by a number of different metrics than smaller/larger businesses.  While this group has typically been focused on residential, this will be brought up with the facilitation team to determine if it fits in our scope for this year.	
In addition, the passage of lead legislation was brought up – specifically the act requiring landlords to register certain identifying information (name, address, email, phone, and if applicable, a property manager) on a statewide registry. For pre-1978 homes, these homes must provide a valid certificate of conformance with the Lead Hazard Mitigation Act. A member was curious about how this will be implemented and whether EE standards could be incorporated.	
RI DEM is working on the 2025 Climate Action Strategy and will be doing a lot of outreach and hosting working groups to increase actions and strategies in that report. They are also looking for any implementation dollars from EPA – so if there are any grant opportunities to go after or potential collaborations, connect with Rachel Calabro at RI DEM.	
Steve Chybowski provided a quick update on the RI OER Air Source Heat Pump Program (Clean Heat RI). The program will be launched soon, and additional details will be shared when public.	
While discussing Year 2 highlights – Bryan highlighted the Community Action Partnership of Providence	

Schedule B

<p>County (CAPP) and their Youth Summer Workforce Program. In 2022, CAPP hired around 89 students. Emily Koo had asked how this program was funded.</p> <p>The program is funded through city CDBG funds that all CAP agencies can have access to. EWG members would love to see this program grow and for RIE to help support these efforts.</p>	
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2022 Program Results	Assessments	Weatherization (Wx)	Conversion from Assessment to Weatherization	Electric Customers by Rate Class	% of Eligible Customers Receiving Assessments	% of Eligible Customers Receiving Wx
<b>EnergyWise</b>	9,251	4,143	45%	408,268 (A-16)	2.3%	1.0%
<b>IES SF</b>	2,679	758	28%	39,042 (A-60)	6.9%	1.9%



# Rhode Island Energy Efficiency Equity Working Group (RI EWG) Year 3 Meeting #2

August 8<sup>th</sup>, 2023



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## RI EWG Year 3 Meeting #2 Agenda

- Welcome
- Update on the RI EWG & Timeline
- Partner/Stakeholder Presentations
  - Angela Li, Rhode Island Energy: Q2 Equity Recommendations Update
  - Brian Kearney & Eileen Barrett, RISE Engineering: Overview of Energy Efficiency Program Barriers & Data Review
  - Margie Lynch, EERMC Consultant Team: Summary of Equity-Related Priorities of the EERMC for the 2024-2026 Plan & Role for the RI EWG
- Member Feedback on New Priorities & Potential Recommendations
- Wrap Up & Next Steps



# Meeting Logistics

- All meetings will take place over Zoom
- All meetings will be recorded for notes purposes
- Stay muted when you are not speaking
- If you have a question or comment, you can:
  - Post it in the chat
  - Raise your hand
  - Post “stack” into the chat to indicate your willingness to speak
- Please rename yourself to include your name, pronouns, and organization/affiliation



### About Green & Healthy Homes Initiative

- Vision: Advancing racial and health equity and opportunity through healthy housing.
- Mission: The Green & Healthy Homes Initiative is dedicated to addressing the social determinants of health and the advancement of racial and health equity through the creation of healthy, safe and energy efficient homes. By delivering a standard of excellence in its work, GHHI aims to eradicate the negative health impacts of unhealthy housing and unjust policies for children, seniors and families to ensure better health economic and social outcomes in low-income communities of color.
- Operating Value: Ensuring racial equity in all policies, practices and actions





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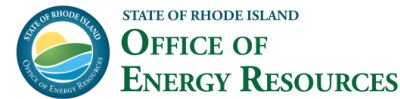
## Rhode Island Energy and Rhode Island Office of Energy Resources

- Rhode Island Energy



We're committed to providing reliable electricity and gas to every community we serve throughout the state — in all the places we call home — while working to help Rhode Island meet its ambitious renewable energy goals over the next decade.

- Rhode Island Office of Energy Resources (OER)



Our mission is to lead the state toward a clean, affordable, reliable, and equitable energy future.

OER develops policies and programs that respond to the state's evolving energy needs, while advancing environmental sustainability, energy security, and a vibrant clean energy economy.

OER is committed to working with public- and private-sector stakeholders to ensure that all Rhode Islanders have access to cost-effective, resilient, and sustainable energy solutions.



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## Equity Working Group Guidelines and Expectations

- Meeting attendees shall:
  - Make every attempt to attend every meeting on time
  - Share the oxygen – ensure that all participants who wish to have an opportunity to speak are afforded a chance to do so
  - Listen to other points of view and try to understand differing viewpoints and other interests
  - Maintain a focus on collaboration and solutions
  - Share information openly and respectfully
  - Make sure information given is accurate
  - Remain flexible and open-minded
  - Review meeting notes and documents prior to next meeting
  - Respect the privacy of the meeting
  - Meeting notes are for participants only
    - What is said during meetings is important, who said it is not
- We will be seeking feedback from other stakeholders outside of this EWG. These are individuals/organizations that were not able to commit to participate in a series of meetings.





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## Equity Working Group Stipends

Stipends are available and intended for individuals who are not otherwise paid to participate. Please contact Bryan ([bevans@ghhi.org](mailto:bevans@ghhi.org)) if you require a stipend.





## Purpose of the RI Equity Working Group

- The Rhode Island Equity Working Group (RI EWG) will give impacted communities, and the organizations that serve them, a structured opportunity to provide input and feedback on equity for the planning, design, and delivery of the residential and income-eligible energy efficiency programs.
- Developed out of discussions from the 2021-2023 Energy Efficiency and Demand Response planning process
- Desired outcomes of RI EWG:
  - Offer a list of prioritized recommendations to be considered for inclusion in the 2024 Annual Plan
  - Action Items from Years 1-2 Recommendations





## Updated Timeline

Timeline and Projected Topics				
June	August	Late August/Early September	End of September	November
<ul style="list-style-type: none"> <li>• Meeting #1 - Kickoff</li> <li>• Review Year 1 &amp; Year 2 of the RI EWG</li> <li>• Hear Updates from Rhode Island Energy</li> <li>• Start a Discussion Surrounding Year 3 Priorities &amp; Next Steps</li> </ul>	<ul style="list-style-type: none"> <li>• Meeting #2</li> <li>• Hear from presenters on Equity-Related Updates &amp; EE Program Barriers</li> <li>• Prioritize New Recommendations and Potential Solutions</li> </ul>	<ul style="list-style-type: none"> <li>• Meeting #3</li> <li>• Potential Speaker: David MacLellan, Program Manager, RI Income Eligible Services Program</li> <li>• Discuss Workforce-Related Priorities &amp; Opportunities</li> <li>• Begin Drafting Final Reports &amp; Provide Open Comment Period for Member Input</li> </ul>	<ul style="list-style-type: none"> <li>• Meeting #4</li> <li>• Review Finalized Report</li> <li>• Discuss Metrics &amp; Expectations Moving Forward</li> </ul>	<ul style="list-style-type: none"> <li>• Meeting #5</li> <li>• Hear from RIE on Q3 EE Equity-Related Updates</li> <li>• Open space for other related topics for members to meet &amp; discuss</li> </ul>

2023 Q2  
Equity-  
Related  
Updates



# Rhode Island Energy™

a PPL company

# Q & A / Discussion





# RIE Barrier Analysis

January 1, 2022 – June 30, 2023



# Executive Summary

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- Review of Barriers to Weatherization
  - Comparison of barriers to all EnergyWise participants
  - Quantity and types of barriers
  - Time to overcome
- Women and Minority Business Enterprise (WMBE) in the EnergyWise program

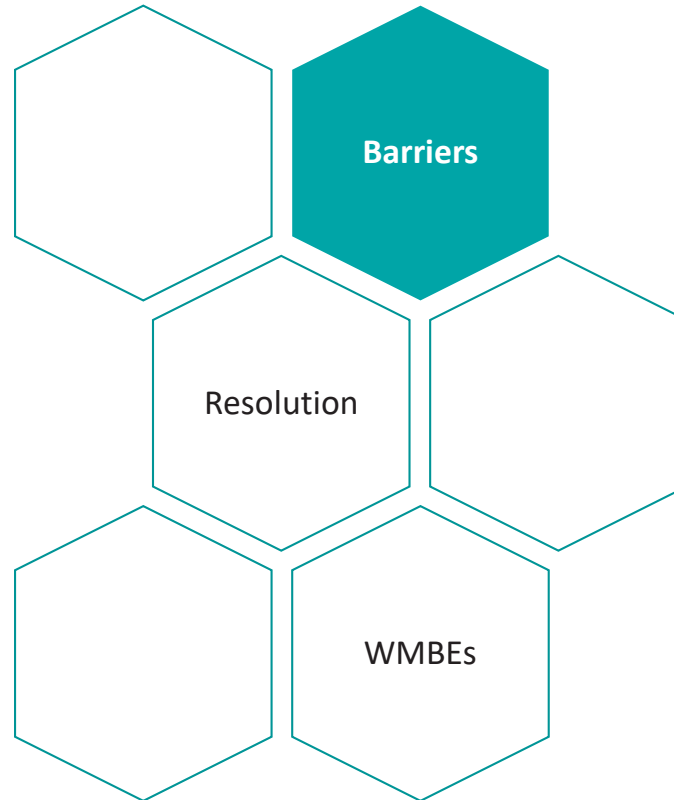
*Data overview is from January 1, 2022 through June 30, 2023*





# Agenda

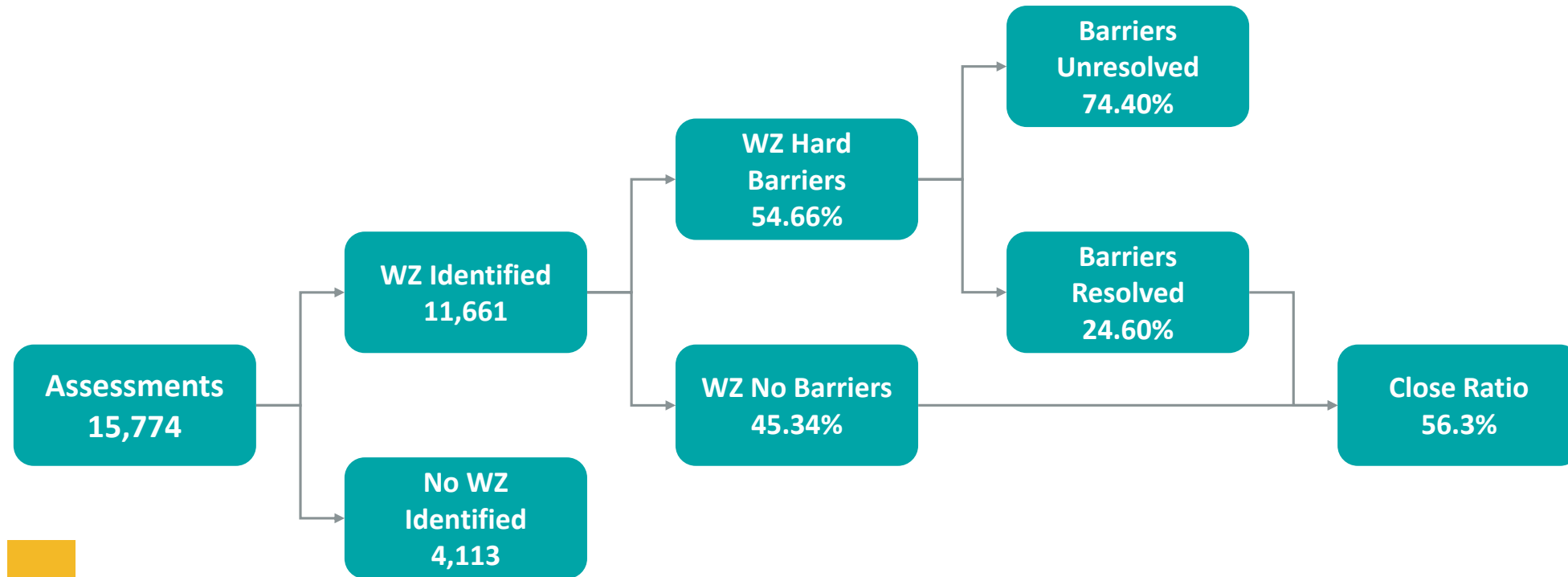
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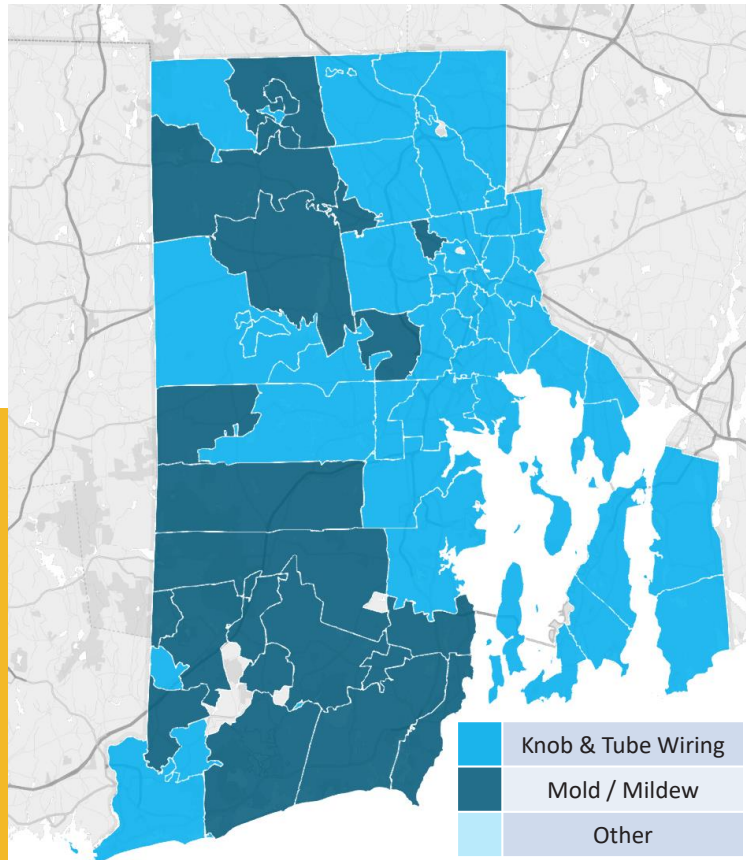


# Overview





# Hard Barriers – Most Common

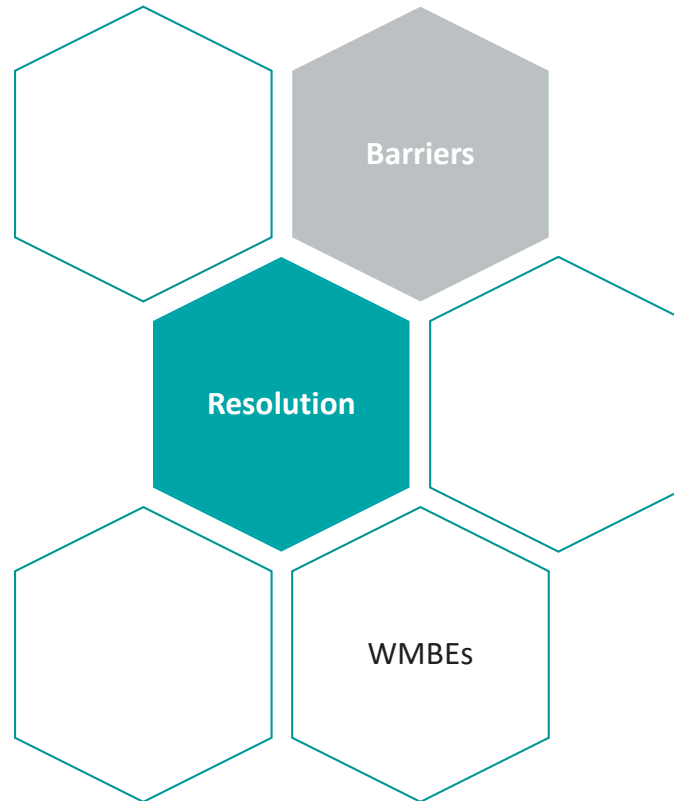


<b>Knob &amp; Tube Wiring</b> 30.9%  Median Cost: \$7,553	<b>Knob &amp; Tube Wiring – Sign Off</b> 20.7%  Median Cost: \$250	<b>Mold / Mildew</b> 12.7%  Median Cost : \$3,642
<b>Carbon Monoxide</b> 6.1%	<b>Depressurization Hazard</b> 4.8%	<b>Custom Barrier</b> 4.0%
<b>Indoor Air Quality</b> 2.6%	<b>Combustion Gas Spillage</b> 2.5%	<b>Moisture Barrier</b> 2.4%



# Agenda

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# Resolutions

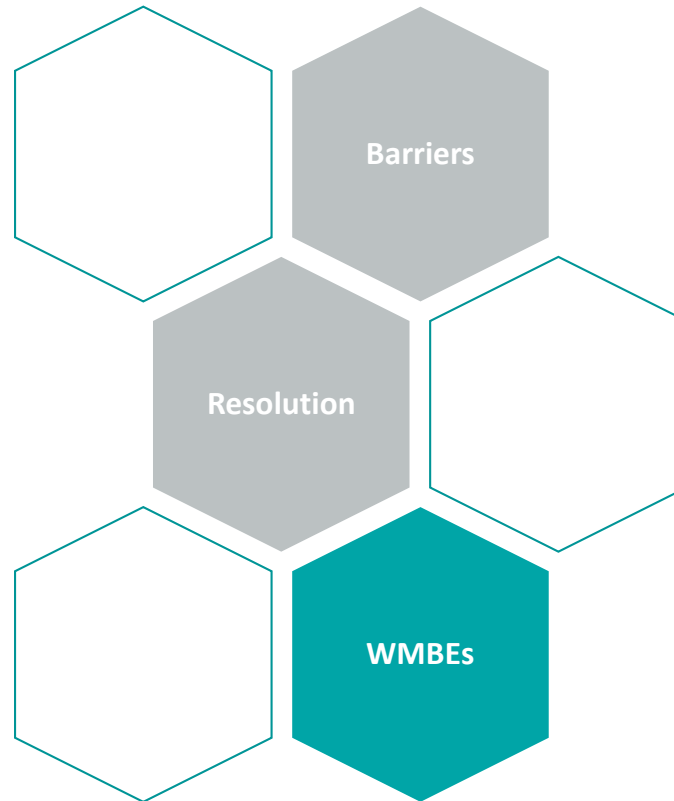
*The average time to resolve is 70 days, with just over a quarter of barriers resolved.*

Barrier	Days to Resolve	Percentage Resolved
<b>Average</b>	<b>70</b>	<b>27.1%</b>
Knob & Tube	101	20.7%
Knob & Tube Sign - Off	79	30.2%
Mold / Mildew	66	28.8%
Carbon Monoxide	97	19.9%
Depressurization Hazard	129	14.5%
Custom Barrier	73	24.6%
Indoor Air Quality	30	35.3%
Combustion Gas Spillage	126	17.5%
Moisture Barrier	89	16.4%



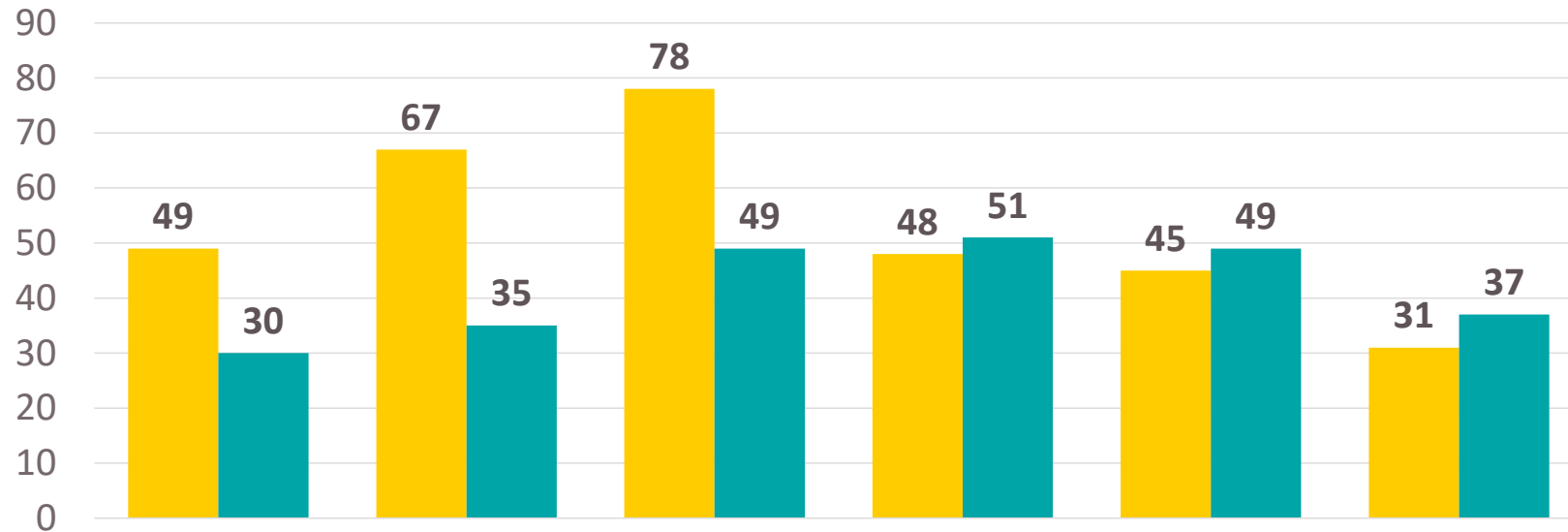
# Agenda

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# WMBE - WZ Appointments Completed



Percentage of WX jobs by WMBEs	1	2	3	4	5	6
	January	February	March	April	May	June
2022	10.63%	13.35%	11.93%	9.88%	12.06%	9.39%
2023	9.12%	10.97%	12.50%	15.55%	13.76%	11.53%



# Q & A / Discussion





STATE OF RHODE ISLAND  
**ENERGY EFFICIENCY &  
RESOURCE MANAGEMENT COUNCIL**

**CONSULTANT TEAM**

# Increasing Participation in Underserved Communities in the 2024-2026 Plan

*Key Opportunities for Input From  
the Equity Working Group*

**Presented By:** Margie Lynch, EERMC C-Team

**Date:** August 8, 2023







## Overview

- The EERMC has adopted the following priority for the 2024-2026 Plan:

### *Increase Participation in Underserved Communities*

- The Council seeks the assistance of the Equity Working Group (EWG) in developing recommendations to advance this priority.
- The EWG has proven to be an effective forum for stakeholder input on matters regarding equitable service.
- This presentation identifies key opportunities for focus and recommendations from the EWG.



# Identify Clear and Objective Determinants of Success

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- These will allow RI Energy, the Council, and stakeholders to understand progress in achieving goals of increasing participation in underserved communities.
- They could take a number of different forms, including key performance indicators and/or formal Equity Targets.



## Achieve Ambitious Savings Goals for Programs Serving Vulnerable Custs.

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- The Income Eligible Single Family and Multifamily and EnergyWise Multifamily programs serve the most vulnerable customers in Rhode Island.
- All of these programs have been struggling to meet planned goals, and remedying this situation is critical.
- The EWG could provide valuable insights regarding how delivery of these programs could be improved to increase performance results.



## Increase Financial Investments in Serving Historically Underserved Populations

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- The Council would like to understand the amount of money the Company will be dedicating to equity efforts.
- We understand that the EWG has previously discussed this topic, and we would like to advance to a transparent presentation of this information.



## Implement Program Improvements that will Ease Participation

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- Streamlining of participation steps, documentation requirements, and income verification processes.



## Increase and Enhance Municipal and Other Community-based Partnerships

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- Particularly to include partnerships with underserved communities.
- Members of the EWG are strongly positioned to assist in shaping effective community-based partnership models for the Company.



# Target Workforce Development Efforts to Underserved Communities

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- See also the Council's separate priority To Deliver Targeted Workforce Development
- This could build on the EWG's prior work on workforce development.



# Q/A







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## Member Feedback on New Priorities & Recommendations:

1. After hearing from the presenters, what gaps or opportunities need to be addressed?
2. What are alternative/new/fresh ways to address program barriers?
3. What partnerships should be formed to address gaps and barriers?
4. What should be prioritized moving forward to make the biggest impact for 2024?

Feel free to raise your virtual hand or come off mute and speak up!



## Wrap Up & Next Steps

- **Next Meeting Date:** Thursday, August 31<sup>st</sup> 2:00-3:30 PM
- **Next Meeting Topic:** Prioritization of Recommendations & Workforce Development
- **RI EWG Updates:**
  - GHHI
  - Rhode Island Energy
  - RI OER
  - Member Update?



If you have any questions or comments, feel free to reach out to Bryan Evans ([bevans@ghhi.org](mailto:bevans@ghhi.org)) or Bert Cooper ([bcooper@ghhi.org](mailto:bcooper@ghhi.org))

**Rhode Island Energy Efficiency Equity Working Group (RI EWG) - Year 3**  
**RI EWG Meeting #2 Notes & Action Items**

**Meeting Agenda:**

- Welcome & Introductions
- Update on the RI EWG & Timeline
- Partner/Stakeholder Presentations
  - Angela Li, Rhode Island Energy: Q2 Equity Recommendations Update
  - Brian Kearney & Eileen Barrett, RISE Engineering: Overview of Energy Efficiency Program Barriers & Data Review
  - Margie Lynch, EERMC Consultant Team: Summary of Equity-Related Priorities of the EERMC for the 2024-2026 Plan & Role for the RI EWG
- Year 3 Priority Areas – Member Input on New Priorities & Potential Recommendations
- Wrap Up & Next Steps

**Meeting Attendees:**

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>• Bryan Evans, GHHI</li> <li>• Bert Cooper, GHHI</li> <li>• Catherine Lee, GHHI</li> <li>• Angela Li, Rhode Island Energy</li> <li>• Steven Chybowski, RI OER</li> <li>• Greg Ohadoma, RI OER</li> <li>• Matt Maini, Energy Fellow Intern at Rhode Island Energy</li> <li>• Spencer Lawrence, Rhode Island Energy</li> <li>• Brenda Clement, HousingWorks RI</li> <li>• Margie Lynch, Consultant Team for the EERMC</li> <li>• Margarita Robledo, RIBA</li> <li>• Jordan Galluzzo, Energy Fellow Intern at Optimal Energy</li> <li>• Karen Verrengia, CLEAResult</li> <li>• Emily Koo, Acadia Center</li> </ul> | <ul style="list-style-type: none"> <li>• Rachel Calabro, RI DEM</li> <li>• Jeannine Silversmith, RI Environmental Education Association (RIEEA)</li> <li>• Leo Major, Green Energy Consumers Alliance</li> <li>• Elder Gonzales Trejo, City of Providence</li> <li>• Jenna Bagnall, Encolor</li> <li>• Almin Pršić, Architect</li> <li>• Priscilla De La Cruz</li> <li>• Garry Bliss, Prospect Health Services</li> <li>• Rele Abiade, One Rhode Consulting &amp; Compete RI</li> <li>• Karen Bradbury, RI OER</li> <li>• Brian Kearney, RISE Engineering</li> <li>• Eileen Barrett, RISE Engineering</li> </ul> |
|--|--|

**Meeting Notes:**Update on the RI EWG & Timeline

- The meeting schedule for the year is provided above. Meeting #3 will be scheduled for Thursday, August 31<sup>st</sup> 2:00-3:30 PM. The agenda will be finalized and sent around soon; however, a portion of the meeting will be dedicated to workforce-related priorities and recommendations.
- Throughout the beginning of September, a matrix/draft final report will be shared that will highlight key priorities and recommendations for Rhode Island Energy's 2024 Annual

Energy Efficiency Plan. Working group members will have time to provide any input or additional feedback to help finalize the report.

- Meeting #4 will be dedicated to reviewing the final report and discussing metrics to ensure work is being done and progress is being made, as well as expectations moving forward.
- Topics are subject to change based on any new developments.

EWG Member Comments/Feedback:

- Emily Koo: It’s helpful; to see the timeline and proposed goals over the next couple of months. I would suggest that we consider metrics, tracking, and implementation of the ongoing implementation of past recommendations and ongoing tracking of quantitative metrics at future meetings would be great to see.

**Partner/Stakeholder Presentations**

Angela Li, Rhode Island Energy: Angela walked through the Rhode Island Energy Efficiency – Q2 Equity Updates report.

- In Q2/Q4, they provide the number of unique participants within each town which provided insight on who is participating throughout the state for Energy Wise’s Home Energy Assessments, Weatherization, and Income-Eligible SF Programs. Tracking started last year because of the RI EWG. At the end of each year, RIE also reports on how much spending has come from energy efficiency from each zip code.
- RIE also tracks owner and renter information:
  - Through Q2, EnergyWise had 12.7% renter participation in HEAs and 10.2% landlord/renter weatherization participation.
  - The IES program had 29.8% renter participation in HEAs and 15.6% renter/landlord weatherization participation.
- Outreach & engagement activities: RIE performed energy efficiency outreach, education, and trainings with a number of community organizations throughout the state. RIE is working to expand relationships with community organizations and partners – and always looking to connect with more organizations.
- RI OER had provided RGGI funding in 2022 for moderate-income work (\$1.25 million) and RIE had started using these funds and has been fully subscribed as of Q2 2023. Through this, they served 354 customers.
  - Angela’s intern, Matt Maini, will be tracking the participants to see the percentage that falls within the 80% state median income and correlating to see which of those participants live in Justice40 areas with this data. We hope to embed it in our plan if it is favorable.

**RI EWG Member Feedback, Comments, & Questions**

Working Group Member Comment/Questions	Rhode Island Energy/RI EWG Response
Looking at the events and partnerships, it would be great to see how successful those events were; the metrics that were included in the recommendations in prior years include # of customers reached, # of conversions based on events, and to see the number of trainings that	RIE has not started the trainings yet, except for RIHousing. The training and referrals are still being worked on. For example, when customers call, RIE will typically ask how the customer heard about the program. However, it doesn’t always track back to a specific event because it

<p>occurred and referrals that come from these community organizations. A prior recommendation was to develop a guiding resource for those agencies and advocates to train their own staff. Does this exist? – Emily K</p>	<p>generally takes many touchpoints before a customer participates.</p>
<p>Looking at the IES program data by municipality, do you know why Cranston stood out? - Bert C</p>	<p>The CAP Agency, CCAP, has been a big help for this number. This is another beneficial community-based partnership.</p>
<p>Do these participation numbers have a points of comparison to an annual # goal or % to goal? – Emily K</p>	<p>Angela is open to hearing feedback from the group on metrics and feasible targets. RIE is capturing this data to set a baseline.</p>
<p>For the moderate-income emails that were sent to residents in the five equity communities, was the subject line in English or Spanish? – Jeanine S.</p>	<p>The subject line is most likely in English (and likely a barrier for non-English speaking residents who might skip the email entirely)</p>
<p>Great open rate, but a pretty low Spanish uptake, given the demographics of the area</p>	
<p>From a marketing standpoint, it is hard to track the source of the referral, but we would be interested in seeing the outline of the timeline of when RIE is doing events, and being able to compare when you're seeing the uptick in sign-ups as a way to help pinpoint what events were happening. What is the outreach plan timeline, tactics to approach this, and any impact you're seeing -Priscilla</p>	<p>In terms of tracking the timeline, it is challenging. However, RIE does track each resident that comes through the Customer Expos and can follow up with each of the sign-ups. In addition, RIE looks to the EWG to provide any additional recommendations to better this information.</p>
<p>Are there any financial or other incentives for partners to support the uptake of EE programs or referrals to these programs?</p>	<p>Angela: In the first draft of the 2024 Annual Plan, \$40,00 was allocated to work with community-organizations.</p> <p>How can we define how we reach out to these organizations and what a good fee structure is for these organizations. MF is always difficult, and we thought we could center the funding around reaching MF landlords.</p>
<p>Would love to see more reference to the metrics provided in the EWG annual report</p>	
<p>Seeing that baseline data will be <b>helpful</b> – it was hard to propose something quantitative without knowing some of the data. -Emily K</p>	
<p>What best practices around developing benchmarking or specific metrics for these programs are available? - Bert</p>	<p>Here's a language access toolkit from the City of Providence that could be helpful: <a href="#">Link</a></p> <p>May be helpful to reach out to someone at the Coalition for a multilingual RI - to understand how to best disseminate these resources with various groups of people based on language limitations – Elder</p>

RISE Engineering, Brian Kearney & Eileen Barrett

Brian and Eileen walked through some of the barriers they see in their EnergyWise programs and had a discussion surrounding those barriers and opportunities.

- From 2022 into 2023, RISE completed 15,774 assessments. Of that, 11,661 households were identified to have opportunities for weatherization.
  - Wx Hard Barriers: 54.66%                      Wx No Barriers: 45.34%
  - Barriers Unresolved: 74.4%                      Barriers Resolved: 24.6%
  - Close Ratio: 56.3%
- Common Barriers to Weatherization: Common barriers to participation include knob and tube wiring (the number 1 barrier), mold, carbon monoxide, depressurization hazard, custom barrier, indoor air quality, combustion gas spillage, moisture barrier.
  - Median Costs to Remediate:
    - Knob & Tube Wiring: \$7,553 + \$250 for Sign Off
    - Mold: \$3,642
  - RIE does provide 0% financing to overcome these barriers including knob and tube wiring, mold and mildew, and vermiculite abatement – up to \$10,000. RISE has a \$250 barrier rebate that is offered to customers.
- Time to Overcome/Resolve Barriers
  - The average time to resolve is 70 days, with just over a quarter of barriers resolved. They actively work with the customer and have the customer’s best interest in mind and always following up with clients with information on specific barriers and ways to overcome them.
- WMBE’s in the EnergyWise Program
  - RISE has up to 20 contractors that are actively engaged in the program, with 4 of these contractors being WMBEs. 12% of the work being done this year is being performed by WMBEs.

RI EWG Member Feedback, Comments, & Questions	
Working Group Member Comment/Questions	RISE/Rhode Island Energy Response
We are working with RI DHS on income-eligible customers to overcome barriers. The Company and DHS have worked to leverage all the program, state, and federal funds. DHS will have federal funding for training, weatherization, and some through the BIL funding for barriers. – Angela Li, Rhode Island Energy	N/A
How many participants have participated in the 0% financing?	26 customers used the heat loan to overcome pre-weatherization barriers in 2022
Here’s a good goal: to increase # of customers on 0% program to overcome barriers by 20% and allocate funding for this purpose (loved by many) (knob & tube of course) – Margarita R.	MA might be having a hard time giving that money out, however, RI residents can benefit greatly from this.

Schedule B

In MA, the income verified moderate income customers are eligible for barrier removal incentives of up to \$7,500/household – Margie L.	
The knob and tube wiring median costs seemed quite low – imagine the costs being much higher and wondering if the \$10,000 cap for each household can be raised to address these barriers. -Emily K	The origination of that cap was mirrored from the work in MA, and they developed those caps when managing a pool of many to address these barriers.
What outreach has been done with RI Black Association? Skills RI Small Business Hub? (Focus on minority business) if none, please reach out – Rele A.	RISE has not done any outreach – in the past, we have had minority owned contractors.  RISE can share the application for the baseline level of having a home improvement contractor’s license, etc.
What kind of opportunities do you see to increase your pool of contractors with the BIL \$/programs down over the next few years?	RISE believes OER is working on a grant around training and development. We’ve seen the largest increase in contractors in the heat pump space. However, RISE has more contractor capacity than they have work.
It was helpful to see the MWBE data. It would be great to see dollar volume – for example, it would be interesting to know if they are getting the bigger jobs, etc.	RISE can do this and typically the job sizes are spread evenly across all contractors.  How are jobs assigned? RISE does three things. We have a participating contractor form; customers can request contractors or contractors can get assigned by RISE. They are judged on a variety of scores/metrics.
Would it be possible to see the median rates of barriers listed by municipality? -Greg O.	RISE will pull this together.

Margie Lynch, Member of the RI EERMC Consultant Team

The EERMC has expressed interest in assessing strategies – especially about increasing participation in underserved communities. Margie walked through key opportunities for the RI EWG to provide solutions and feedback.

- Identify Clear & Objective Determinants of Success: This could take a number of different forms, including key performance indicators and/or formal Equity Targets. Here is a [link](#) to the Massachusetts Equity Working Group equity targets.
- Achieve Ambitious Savings Goals for Programs Serving Vulnerable Customers
  - The Income Eligible Single Family & Multifamily and EnergyWise Multifamily programs serve the most vulnerable customers in Rhode Island. Margie stated that all of these programs have been struggling to meet goals and how the RI EWG can provide valuable insights regarding how these programs can be improved to reach goals.
- Increase Financial Investments in Serving Historically Underserved Populations

- The Council would like to get a better sense of the amount of money Rhode Island Energy has dedicated to underserved populations – including renter populations, money spent on language access, etc. This can increase transparency and support future goal setting.
- Implement Program Improvements that will Ease Participation
  - This includes streamlining participation steps, documentation requirements, and income verification processes.
  - Typically, programs are set up in a fashion that meets the needs of the program administrators – but it’s important to step back and ease participation as it will benefit all customers. Especially for those customers with more burdens (e.g., multiple jobs, limited resources).
- Increase and Enhance Municipal and Other Community-Based Partnerships
  - These community-based partnerships are very effective strategies – and RI has a great opportunity to go further with the RI EWG
- Target Workforce Development Efforts to Underserved Communities
  - The Council has a separate priority to target workforce development in underserved communities– including the number of workers, creating a competent, skilled workforce, and a diverse workforce to serve all communities.
  - This includes having an expansive definition of what groups are underserved (not limited to geography)

RI EWG Member Feedback, Comments, & Questions	
Working Group Member Comment/Questions	Margie Lynch Response
Yes, would love to have a deeper conversation about the nature/depth of community partnerships -Emily K	
Rhode Island Energy has a Community Solutions program that awards a \$20,000 grant towards EE for meeting goals. The company has been working with East Providence and their priorities are small business. There have been a lot of Main Street outreach to East Prov businesses	The MA EWG met the same week and had a panel of their Community First Partners. These partners are able to receive up to \$60,000 depending on how they achieve certain equity metrics. These partners are also required to hire energy advocates for at least 10 hours/week to provide services to residents in underserved communities (full-time preferred, but challenging to fund)
Have any of these topics been discussed in relationship to building code / building design?	
The New LCP standards may include requirements related to equity metrics – was this included?	Margie wasn’t sure and would find out.  Angela stated the PUC provided feedback on cost procurement where it was raised to have the equity metrics. The Company has also proposed having self-attestation and lower barriers to participation for income-qualified customers. The Division was not in favor of this and was asked twice. The Company continues to work on this.



**Action Items:**

Action Item	Owner(s)	Notes	Status
Would RIE be able to add a column on the number of conversions indicating how many customers in each of these communities installed EE measures	Angela Li	Angela will check on this and get back to the group	In Progress
Figure out the percent of market rate customers that are renters and what percent of the IES customers are renters?	Angela Li	Angela will look into this and if they have it broken down this way	In Progress
RISE can share the application for the baseline level of having a home improvement contractor’s license, etc.	Brian K		In Progress
Bryan will begin to develop a matrix of priorities and recommendations for the RI EWG to further discuss in future meetings	Bryan	This matrix will help guide discussions on finalizing key priorities and recommendations for RIE	In Progress

**Other Resources:**

2022 Program Results	Assessments	Weatherization (Wx)	Conversion from Assessment to Weatherization	Electric Customers by Rate Class	% of Eligible Customers Receiving Assessments	% of Eligible Customers Receiving Wx
EnergyWise	9,251	4,143	45%	408,268 (A-16)	2.30%	1.00%
IES SF	2,679	758	28%	39,042 (A-60)	6.90%	1.90%
Total Customers	11,930	4,901		447,310		
% IES	22%	15%		8.7%		



# Rhode Island Energy Efficiency Equity Working Group (RI EWG) Year 3 Meeting #3

August 31<sup>th</sup>, 2023



## RI EWG Year 3 Meeting #2 Agenda

- Welcome
- Update on the RI EWG & Timeline
- Meeting #2 Review & Key Takeaways
- Partner/Stakeholder Presentations
  - Brendan Dagher, Rhode Island Energy
  - Sonakshi Saxena, National Grid
- Review RI OER Equity-Related Metrics
- Member Feedback on Priorities & Recommendations
- Wrap Up & Next Steps



# Meeting Logistics

- All meetings will take place over Zoom
- All meetings will be recorded for notes purposes
- Stay muted when you are not speaking
- If you have a question or comment, you can:
  - Post it in the chat
  - Raise your hand
  - Post “stack” into the chat to indicate your willingness to speak
- Please rename yourself to include your name, pronouns, and organization/affiliation





### About Green & Healthy Homes Initiative

- Vision: Advancing racial and health equity and opportunity through healthy housing.
- Mission: The Green & Healthy Homes Initiative is dedicated to addressing the social determinants of health and the advancement of racial and health equity through the creation of healthy, safe and energy efficient homes. By delivering a standard of excellence in its work, GHHI aims to eradicate the negative health impacts of unhealthy housing and unjust policies for children, seniors and families to ensure better health economic and social outcomes in low-income communities of color.
- Operating Value: Ensuring racial equity in all policies, practices and actions





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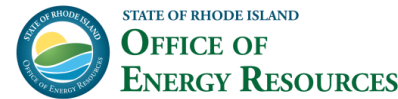
## Rhode Island Energy and Rhode Island Office of Energy Resources

- Rhode Island Energy



We're committed to providing reliable electricity and gas to every community we serve throughout the state — in all the places we call home — while working to help Rhode Island meet its ambitious renewable energy goals over the next decade.

- Rhode Island Office of Energy Resources (OER)



Our mission is to lead the state toward a clean, affordable, reliable, and equitable energy future.

OER develops policies and programs that respond to the state's evolving energy needs, while advancing environmental sustainability, energy security, and a vibrant clean energy economy.

OER is committed to working with public- and private-sector stakeholders to ensure that all Rhode Islanders have access to cost-effective, resilient, and sustainable energy solutions.



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## Equity Working Group Guidelines and Expectations

- Meeting attendees shall:
  - Make every attempt to attend every meeting on time
  - Share the oxygen – ensure that all participants who wish to have an opportunity to speak are afforded a chance to do so
  - Listen to other points of view and try to understand differing viewpoints and other interests
  - Maintain a focus on collaboration and solutions
  - Share information openly and respectfully
  - Make sure information given is accurate
  - Remain flexible and open-minded
  - Review meeting notes and documents prior to next meeting
  - Respect the privacy of the meeting
  - Meeting notes are for participants only
    - What is said during meetings is important, who said it is not
- We will be seeking feedback from other stakeholders outside of this EWG. These are individuals/organizations that were not able to commit to participate in a series of meetings.



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## Equity Working Group Stipends

Stipends are available and intended for individuals who are not otherwise paid to participate. Please contact Bryan ([bevans@ghhi.org](mailto:bevans@ghhi.org)) if you require a stipend.







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## Purpose of the RI Equity Working Group

- The Rhode Island Equity Working Group (RI EWG) will give impacted communities, and the organizations that serve them, a structured opportunity to provide input and feedback on equity for the planning, design, and delivery of the residential and income-eligible energy efficiency programs.
- Developed out of discussions from the 2021-2023 Energy Efficiency and Demand Response planning process
- Desired outcomes of RI EWG:
  - Offer a list of prioritized recommendations to be considered for inclusion in the 2024 Annual Plan
  - Action Items from Years 1-2 Recommendations





## Updated Timeline

Timeline and Projected Topics				
June	August	Late August/Early September	End of September	November
<ul style="list-style-type: none"> <li>• Meeting #1 - Kickoff</li> <li>• Review Year 1 &amp; Year 2 of the RI EWG</li> <li>• Hear Updates from Rhode Island Energy</li> <li>• Start a Discussion Surrounding Year 3 Priorities &amp; Next Steps</li> </ul>	<ul style="list-style-type: none"> <li>• Meeting #2</li> <li>• Hear from presenters on Equity-Related Updates &amp; EE Program Barriers</li> <li>• Prioritize New Recommendations and Potential Solutions</li> </ul>	<ul style="list-style-type: none"> <li>• Meeting #3</li> <li>• Discuss Workforce-Related Priorities &amp; Opportunities</li> <li>• After Meeting #3, Begin Drafting Final Report &amp; Begin Open Comment Period for Member Input</li> </ul>	<ul style="list-style-type: none"> <li>• Meeting #4</li> <li>• Review Finalized Report</li> <li>• Discuss Metrics &amp; Expectations Moving Forward</li> </ul>	<ul style="list-style-type: none"> <li>• Tentative Meeting #5</li> <li>• Hear from RIE on Q3 EE Equity-Related Updates</li> <li>• Open space for other related topics for members to meet &amp; discuss</li> </ul>

Equity  
Outreach  
Demonstration  
Updates



**Rhode Island  
Energy™**

**a PPL company**

# Q & A / Discussion





WE ARE MASS SAVE™:



# Initiatives



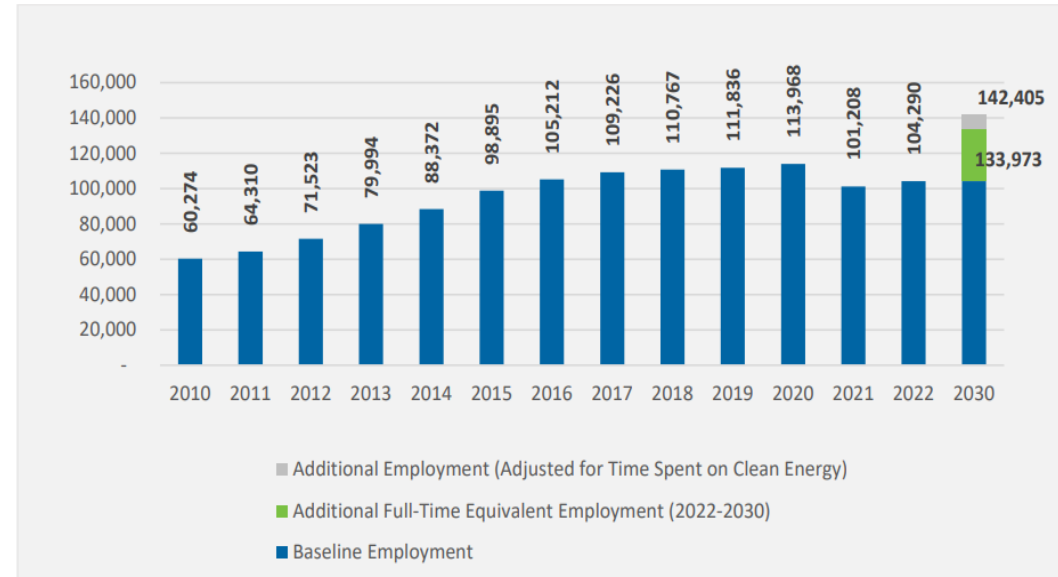
Initiative	PM	CEM
CEP Internship	John Massie	Sonakshi Saxena
Residential Electric HVAC Training - All Channels	Steve Jaslowich	Melanie Coen
Residential Electric HVAC Training - Contractors	Steve Jaslowich	Melanie Coen
Other HVAC Vendor Training	Steve Jaslowich	Melanie Coen
Codes and Standards Training	Ishaga Diagana	Joel Martell
Building Operator Certification	Brian Richards	Dave Gibbons
New Construction Passive House and All Electric Training	Ishaga Diagana	Joel Martell
HEA & Wx Crew Training	Leah Berger	Chris Lavellee
MA EE Partnership at UMass Amherst	Mark Dipetrillo	Dave Gibbons
CAP Agency Staff Training	Mike Rosacci	Sonakshi Saxena



## • Current WFD Goals

- Equitable Participation and Benefits
- Barriers to Entry
- Language Access
- Community Development
- MWBEs

FIGURE 1. TOTAL CLEAN ENERGY EMPLOYMENT, 2010-2030<sup>44 45</sup>



Source: *Powering the Future: A Massachusetts Clean Energy Workforce Needs Assessment*. Massachusetts Clean Energy Center, July, 2023

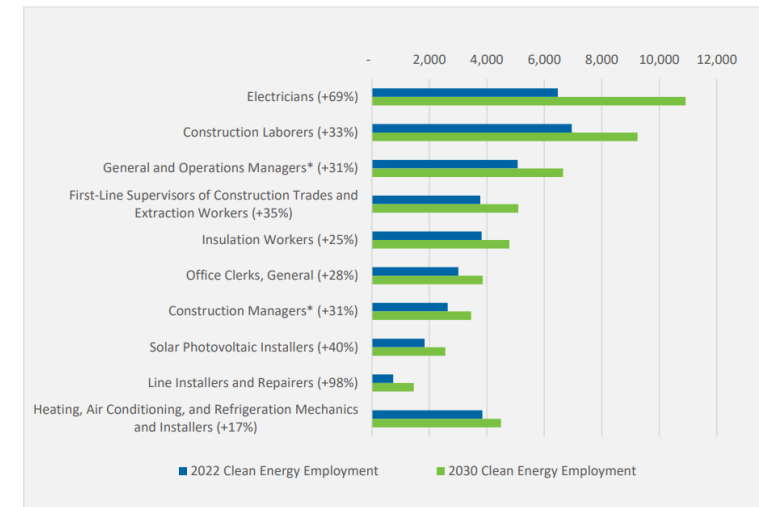


## • Clean Energy Pathways Program

As of Q1 2023, program has achieved the following across 3 cohorts (2 Wx, 1 HVAC):

- 43 interns started the program, of which 98% reside in an environmental justice community & 91% self-reported as person of color
- 23 interns graduated
- 19 graduates received offers for full-time employment upon graduation (74% job placement rate) Planning and recruitment is well under way for cohort 4, which will be focused on HVAC beginning in June 2023
- Cohort 4: 13 interns started and all graduated the program

FIGURE 8. TEN HIGHEST-GROWTH CLEAN ENERGY JOBS BY OCCUPATION (2022-2030)<sup>53 54</sup>



Source: *Powering the Future: A Massachusetts Clean Energy Workforce Needs Assessment*. Massachusetts Clean Energy Center, July, 2023





- **MWBE Summits October 2023**

- Annual networking event for MWBEs - last year we had 200 attendees
- Program Awareness and Opportunities
- Procurement and RFP/RFQ process
- Vendor Spotlights
- Vendor Network : [Mass Save | Partner with Mass Save to Benefit Residents and Businesses](#)



WE ARE MASS SAVE™:





# Q & A / Discussion





## Breakout Group Activity

RI EWG Recommendations & Actions for Rhode Island Energy's Annual Energy Efficiency Plan for 2023		
Issue/Challenge	Potential Year 3 Key Recommendations	Year 3 Actions
The issue of Wx barriers is widespread in RI. RISE reported of the 11,600+ households that were identified to have opportunities for Wx. 54% had Wx barriers and 74% of those barriers were unresolved.	1) Allocate more funding and resources to address deferrals/unresolve rates and get more homes weatherization ready	
Low participation rates among BIPOC residents. For example, the Rhode Island Energy email blasts resulted in low click rates from Spanish and Portuguese households.  Remember, RIE reported: <ul style="list-style-type: none"> <li>• EnergyWise had 12.7% renter participation in HEAs and 10.2% landlord/renter Wx participation</li> <li>• The IES Program had 29.8% renter participation in HEA's and 15.6% renter/landlord Wx participation</li> </ul>	1) Increase outreach and participation from BIPOC Communities	1) Connect with local organizations like CACD, CV Club, Coalition for a Multilingual Rhode Island, RI Black Association, Skills RI Small Business Resource Hub (focus on minority business) 2) Ensure all communication to Non-English households is in the appropriate language (e.g.; translate email subject lines) 3) Perform an internal review to determine the capability of enhancing program steps (documentation requirements, income verification, self-attestation, etc.)
MF is always difficult and Rhode Island Energy is looking to define how they reach out to this group	1) Increase MF Landlord Engagement & Participation in BIPOC Communities	1) Develop a strategic plan with detailed examples of how RIE will serve and reach MF landlords
Equitably growing and diversifying the EE workforce	1)	



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## Member Feedback on New Priorities & Recommendations:

1. What funding opportunities are available to further overcome weatherization barriers?
2. Based on current practices, how can Rhode Island Energy better disseminate resources and training opportunities with BIPOC organizations and communities? (e.g. language access, WMBEs, etc.)
3. What's the best strategy to reach MF landlords? What has/hasn't worked?
4. What is a good fee structure for community-based partners to support energy efficiency efforts?
5. After hearing from the presenters, what gaps or opportunities need to be addressed?
6. What partnerships should be formed to address gaps and barriers?

Feel free to raise your virtual hand or come off mute and speak up!



## Wrap Up & Next Steps

- **Next Meeting Date:** TBD, Doodle Poll To Be Sent Following the Meeting
- **Next Meeting Topic:** Final Report Development & Review
- **Next Steps**
  - Bryan will share the draft matrix for further feedback and review. RI EWG members will have time to review and provide feedback and final input.
  - In addition, Bryan will also begin drafting the final report
- **RI EWG Updates:**
  - GHHI
  - Rhode Island Energy
  - RI OER
  - Member Update?



If you have any questions or comments, feel free to reach out to Bryan Evans ([bevans@ghhi.org](mailto:bevans@ghhi.org)) or Bert Cooper ([bcooper@ghhi.org](mailto:bcooper@ghhi.org))



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## Extra Slides



## RI OER – Equity Reporting Metrics

Dollars saved (\$) in energy expenditures due to technology adoption in DAC	Energy saved or reduction in fuel by DACs	Avoided air pollutants (CO2 equivalents, NOx, SO2, and/or PM2.5) in DACs	Number of jobs created for DACs because of DOE program/Number of hires from DACs resulting from job trainings	Dollars spent (\$) and/or number of participants from DACs in job trainings programs, apprenticeship programs, STEM education, tuition, scholarships, etc.	Number of stakeholders events, participants, and/or dollars spent to engage with organizations and residents in DACs including participation and notification of programs	Change in air quality in BIPOC –F-LI communities	Reductions in asthma or respiratory distress	% Contracts awarded to frontline-owned businesses	% of households and communities that have access to reliable and sustainable energy sources
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**Rhode Island Energy Efficiency Equity Working Group (RI EWG) - Year 3 Meeting #3 Notes****Meeting Agenda:**

- Welcome/Introductions
- Update on the RI EWG & Timeline
- Meeting #2 Review & Key Takeaways
- Partner/Stakeholder Presentations
  - Brendan Dagher, Rhode Island Energy
  - Sonakshi Saxena, National Grid
- Member Feedback on Priorities & Recommendations
- Review RI OER Equity-Related Metrics
- Wrap Up & Next Steps

**Meeting Attendees:**

- |   |  |
|---|--|
| - Bryan Evans, GHHI RI                  | - Eileen Barrett, RISE                   |
| - Bert Cooper, GHHI                     | - Emily Koo, Acadia Center               |
| - Angela Li, Rhode Island Energy        | - Garry Bliss, PHSRI-AE                  |
| - Spencer Lawrence, Rhode Island Energy | - Jenna Bagnall, Abode Energy Management |
| - Matthew Maini, Rhode Island Energy    | - Karen Verrengia, ClearResult           |
| - Brendan Dagher, Rhode Island Energy   | - Lidia Nunez, CAPP                      |
| - Brett Feldman, Rhode Island Energy    | - Margie Lynch, EERMC C-Team             |
| - Steve Chybowski, RI OER               | - Melina Lodge, Housing Network of RI    |
| - Greg Ohadoma, RI OER                  | - Rachel Calabro, RI DEM                 |
| - Karen Bradbury, RI OER                | - April Brown, REJC                      |
| - Adrian Caesar, EERMC C-Team           | - Sonakshi Saxena, National Grid         |
| - Brenda Clement, HousingWorks RI       |  |

**Meeting Notes: Partner/Stakeholder Presentations****Brendan Dagher, Energy Efficiency Equity Demonstration – Kick Off Discussion**

- Brendan provided an overview of the equity demonstration (Expected Launch: Early 2024)
  - Challenge: Non-profit organizations are facing increased demands to provide EE education and outreach in equity communities with no additional funding
    - Needs: innovative strategies to reach MF renters & better understand customer barriers to accessing EE programs
  - Response: RIE will implement a demonstration to distribute \$40k in incentives to a handful of organizations to provide direct education and outreach to landlords.
- Funding Structures: RIE will create an application process that selects non-profit organizations based on impact potential in the Company's equity communities. Below are the two options the Company is considering and is looking for feedback from RI EWG members.
  - Option 1: Designate funding for one or two part-time "energy advocates" to work directly with landlords and renters in our equity communities.
    - The energy advocates will serve as a "conciierge" to take landlords and renters from education through the adoption of EE programs.
    - The Company will provide the advocates with comprehensive training on EE offerings, create multilingual marketing materials to perform equitable outreach and share any best practices and provide local event support.

- Pros: Dedicated resource allows for deeper training, focused efforts in the communities, and accessible feedback
    - Cons: limited incentives available for producing leads, fewer organizations = less widespread outreach, less room for creativity in the application process
  - Option 2: Select a handful of organizations to receive startup funding and provide additional incentives per lead generated.
    - Non-profits will produce their own models to engage landlords and renters and will receive an incentive for each new participant in the Company’s programs.
    - The Company will provide training in EE offerings to non-profit partners, create multilingual marketing materials, share any best practices, and provide local event support.
    - Pros: encourages creativity and diversity in outreach approach, empowers non-profits to be the leaders, incentivizes generation of leads
    - Cons: Dedicated resources not ensured, potential for disparate feedback, reduced opportunity for dedicated training, less funding for multiple organizations
- Measurements of Success: Examples include:
  - # of landlords reached
  - # of new areas of feedback
  - # of customers providing feedback
  - # of points of contact before participation
  - # of new participants
  - # of new participants/demo \$ spent
  - Total associated customer energy savings (\$)
  - Conversion rate of contacts to participants (%)

RI EWG Member Feedback, Comments, & Questions	
Working Group Member Comment/Questions	Rhode Island Energy/RI EWG Response
<p>Margie L: Great work being done – A few quick thoughts/questions.</p> <ol style="list-style-type: none"> <li>1) Is it \$40k for each organization or overall?</li> <li>2) Partnering with non-profits is a great strategy, would you consider providing funding to potential municipal partners (they do this in MA). Municipalities can be a trusted source to gain political will and effectiveness – might be a good partnership idea and have a more proactive role for them.</li> <li>3) Allow for two full years of the demonstration – it takes time to get things up and running.</li> <li>4) As you look at metrics of success, it’s important for this to be focused on results, participation, and energy savings – but it’s also important to track what is happening with the renter populations, and participants based on income, race, language challenged customers, etc.</li> </ol>	<ol style="list-style-type: none"> <li>1) \$40k overall – RI EWG members agreed this number needs to be increased. In MA, the Community First Partners receive \$60k each.</li> <li>2) Angela from RIE commented that the Company works with municipalities through Community Solutions</li> <li>3) Karen V backed up this statement, agreeing that allowing more time will be more effective.</li> </ol> <p>Emily K – very supportive of the more comprehensive concierge support. Here are comments that mention that: <a href="#">Link</a></p>
<p>Emily K – Looking at the two options, Option 2 does not provide enough funding for a robust effort and would argue a more well-funded approach will allow non-profits to be more creative.</p> <p>Regarding metrics, Emily would like to see data from the Company regarding lead generation connected to outreach to have a baseline. Emily liked the metrics, but</p>	

<p>also including how participation is in terms of geography, EJ v non-EJ areas, etc. (not just reporting the number)</p> <p>In addition, looking at the value of a multilingual energy advocate and acknowledge the amount of time and skill needed to do this work. To add on, Emily would love to have more information on those advocates. It would be good to know what is already happening in the communities from the advocates.</p> <p>Lastly, Emily would be interested in continuing to engage this group and the EERMC on the application process – if this is doable.</p>	
<p>Bert C – Given your resource constraints, you might want to pick one or two communities to focus on</p> <p>If you go the concierge route, if there is a way to tie education and awareness around all the rebates coming down as a potential incentive and maybe help encourage participation and follow through with getting the work done – it might be a sweetener in the deal for potential participants</p>	<p>Angela responded and the Company thinks it will come down to 1-2 communities, depending on where the non-profits have local relationships. The Energy Advocates will also ideally be hired and housed by the local non-profit.</p> <p>Brendan and the team are looking into this, especially with the IRA.</p>
<p>Bert C – In thinking about metrics, and how many folks move through to Weatherization, and how many issues we can get resolved – there might be a way to find additional funding to tie to this demonstration and fix those pre-Wx issues. Rather than just outreach.</p>	<p>Jenna B, representing the Clean Heat RI Program, loves this thought to address pre-Wx barriers and would love to connect more on this.</p> <p>Brendan D also would like to connect more on this</p>
<p>Adrian Caesar – This was a helpful presentation. Adrian added that also included in the 2024 Plan, is a transition to a new data collecting platform – so being proactive about what data needs to be collected and what changes need to be made to those tools to make sure this is an efficient process</p>	

Sonakshi Saxena, National Grid – MA Energy Efficiency Workforce Development

- Mass Save Initiatives: In the current 3-year plan (2022-2024), the following trainings are offered, including, but not limited to the Clean Energy Program Internship, Residential Electric HVAC Training, CHEA & Wx Crew Training, and CAP Agency Staff Training.
  - Current Workforce Development Goals: Demand for clean energy jobs will continue to increase and we need to be ready to accommodate this increased demand to have a properly trained and equitable workforce. This includes equitable participation and benefits, barriers to entry, language access, community development, and focusing on MWBEs and developing a more streamlined pathway to engage with MWBEs.
- Clean Energy Pathways Program
  - The focus of the program is to provide a full-time paid, 3-month internship that aims to create a sustainable pipeline of HVAC and Wx workers. By recruiting from EJ communities, they hope to grow and diversify the EE workforce in MA.
  - As of Q1, the program has achieved the following across 3 cohorts (2 Wx, 1 HVAC)

- 43 interns started the program (98% reside in an EJ community, 91% reported as POC
    - 23 interns graduated.
    - 19 graduates received offers for full-time employment upon graduation.
    - Cohort 4 focuses on HVAC and began back in June 2023. 13 interns started and all graduated from the program.
  - They are currently underway with Cohorts 5 and 6 (1 Wx and 1 HVAC)
- MWBEs Summit – October 2023
  - **Note:** This portion of Sonakshi’s presentation was interrupted by a false fire alarm at her office. We were not able to hear directly from her on the MWBEs Summit but if you have any questions – feel free to reach out to Sonakshi directly.

RI EWG Member Feedback, Comments, & Questions	
Working Group Member Comment/Questions	Rhode Island Energy/RI EWG Response
Karen V – In regard to the trainings offered, Karen stated that this sounds like <a href="#">RCWP</a> in RI.	Karen V – <a href="#">Workforce Development Blog</a>
Steve C - How does that process compare to MA or any other state?  Bert C – In terms of MWBEs, is becoming a formal MWBE comprised of any barriers or more of a self-attestation process?  Brenda C - We have heard that same complaint from women and minority-owned businesses bidding on state contracts – We need to work on this issue together to fix the system.  Jenna B - Agree that certification is a challenge, in many states!	Margie L spoke directly about this as she was encouraged to qualify as an MWBE through her own business. The process was insanely burdensome – they wanted her to report every asset she owned. She declined to pursue it.  Angela L followed up and they wanted to use self-attestation since a lot of their Wx contractors are minority or women-owned, but they don’t go through this process because it is burdensome.
Emily K - Appreciate that self-attestation option. OER created some kind of self-attestation option for the heat pump program...	
Margie L - Here are the <a href="#">MA Equity Targets</a> . One piece Margie finds interesting is that there is one piece that reports out on an equity target that reports on the # of contracts given to MWBEs compared to the total # of contracts and also the \$ spent on MWBEs as compared to the total \$ spent overall	Emily K – building off Margie’s comments, thinking about the percentage of dollars, and percentage of jobs – but really thinking about what indicates impact here.
Adrian C – Understanding that the Company expressed partnering with existing state agencies who do these workforce trainings. How does the Company intend to work with state agencies more?	Brett F – We are working through this with ClearResult. Speaking with RI OER to access state and federal funding opportunities. The Company will be coordinating that over time.
Bert C – Does anyone know about the Clean Energy Internship Program was funded?	Adrian C - funded by the Program Administrators at Mass Save. Margie L - The funding amount was in the ballpark of \$3 million, which was part of the overall program budgets.
April B - What is the community outreach structure? April brought up how we talk about WFD as if it’s something people will come to willingly – but the challenge is knowing how to get the people you want to participate in these	Jenna B - April, I appreciate that you are calling out community outreach and engagement, including the aspect of building trust. That is critical to make an intentional plan.

<p>things. Some people will be aware of these opportunities, but some will not. It’s not just the language barrier, it’s the trust of the entities who are calling people in to train.</p> <p>So, think about what kind of relationships you are having and who you have as a 3<sup>rd</sup> party person who has the trust of the community so people can come and feel safe and heard. It’s a question we need to answer first – the community engagement structure is key to making all these things successful</p>	
<p>Margie L – MA is going through their 3-year process planning now and one key piece of stakeholder input that might be interesting here is – the way the program works in MA, the workforce people are trained outside of Mass Save and plugged in once they have developed the skills. One contractor reached out to ask for more support and resources to do training in their own business</p>	<p>April B - This is a great pathway engagement!</p>
<p>Emily K – Is the utility interested in funding something like the Clean Energy Pathways program?</p>	<p>Angela L – We are currently investing in the RIBA RCWP training. They recruit from the communities, and the cohorts work with the CAP agencies.</p> <p>Emily K – would love to hear more about the number of graduates staying with the CAP agency.</p>
<p>Emily K – Is there food at the RIE Customer Expo events? People like to come for free food</p>	<p>Angela L - Food is provided for the vendors. Angela also shared two links on the Customer Expos (<a href="#">Blog 1</a>, <a href="#">Blog 2</a>)</p>
<p>Margie L - I can’t remember: Does RI Energy have a language access plan? If not, it would be great to add that to 2024 plan priorities with a view to supporting LEP customers at each step of their journey</p>	<p><a href="#">Linked</a> is the City of Providence’s Language Access Toolkit, however, RIE stated this can be a challenge on the energy efficiency side.</p>
<p>Emily K - Greg - are we talking about broader or indoor air quality?</p>	<p>Greg O - Broader. Greg imagined it would be difficult to manage indoor air quality metrics for all residents who participate</p>

**Draft Year 3 Matrix Review:**

RI EWG Member Feedback, Comments, & Questions	
Working Group Member Comment/Questions	Rhode Island Energy/RI EWG Response
<p>Emily K – It’s hard to develop recommendations and actions without understanding what metrics we can depend the utility to report on and knowing the larger target for the entire year. I think looking at these recommendations, they all go back to funding community organizations to help do more robust outreach but would like to see a more specific baseline of existing rates of conversion and rates of lead contacts at events. Understanding this baseline can help set a target number for the year – this can include 3-10 individuals trained in each outreach service area, X number of referrals from community organizations, 20% conversion rate, 50% conversion from audits to Wx.</p> <p>I haven’t seen the recommendations, actions, and metrics from Year 2 translated into the reports. For example – setting a target for the year and having metrics to measure it so that we can reasonably ask the utility to report quarterly.</p>	<p>Bert: to clarify, before we can think about recommendations and actions – we need to have that baseline.</p> <p>Emily: Yes, that’s one thing – for example, if there’s a 25% resolve rate &gt; set a goal to 35%</p>
<p>April B – piggyback on Emily’s comments regarding data - is there any way by which when you interpret the data, you see how it affects communities? The issue is that data is very high level, but when you start to think about the data and the people it’s supposed to help, it often misses. Is there any type of pathway for people who are directly affected by the data for that to be present in terms of what RIE collects for metrics? This is helpful and directed to the idea of community outreach and how RIE is authentically engaging communities. If you have good community engagement, you do not need to work hard because the community is working on the plan.</p> <p>Also, when you think about community outreach, it doesn’t work when you have a government agency and one community agency – you need much more than 1. It’s not fair in terms of capacity.</p>	<p>Bert C – Back in 2010, we wrote a \$3 million green workforce proposal to train folks on weatherization. We partnered with the Amos House and a number of other community groups to do the trainings and went very well.</p> <p>Angela L – Rhode Island Energy relies a lot on our CAP agencies, and some CAP agencies have more success than others.</p> <p>Angela shared her screen to show one-pagers on the customer assistance expos. They track data on total attendees, families assisted, # of energy audits, # of partner agencies, # of mailed outreach, and # of electronic invitations.</p> <ul style="list-style-type: none"> <li>- All energy audit sign-ups were for renters and most believed they could not sign up since they were not homeowners.</li> <li>- Other Common themes from expos: Are there resources available for those who don’t qualify for LIHEAP? What other resources are available for renters in addition to LIHEAP?</li> </ul>

**RI OER – Equity Reporting Metrics**

Dollars saved (\$) in energy expenditures due to technology adoption in DAC	Energy saved or reduction in fuel by DACs	Avoided air pollutants (CO2 equivalents, NOx, SO2, and/or PM2.5) in DACs	Number of jobs created for DACs because of DOE program/Number of hires from DACs resulting from job trainings	Dollars spent (\$) and/or number of participants from DACs in job trainings programs, apprenticeship programs, STEM education, tuition, scholarships, etc.	Number of stakeholders events, participants, and/or dollars spent to engage with organizations and residents in DACs including participation and notification of programs	Change in air quality in BIPOC –F-LI communities	Reductions in asthma or respiratory distress	% Contracts awarded to frontline-owned businesses	% of households and communities that have access to reliable and sustainable energy sources
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RI EWG Member Feedback, Comments, & Questions	
Working Group Member Comment/Questions	Rhode Island Energy/RI EWG Response
Emily K - What role are the equity metrics playing in the recommendations?	<p>Bryan E – We plan to incorporate these metrics into our recommendations as the EWG sees fit.</p> <p>Greg O – Created these metrics for OER’s energy efficiency programs based on the Biden’s Administration’s Justice40 Initiative.</p>
Adrian C – related to the metrics, one thing we noticed was a lack of equity metrics related to small businesses. There are underserved small business customers and data has shown that this is an underserved segment and would be important to consider including that in the metrics too	
<p>April Brown – one of the challenges the <a href="#">REJC</a> sees is that data can be missing. How are you getting to the constituency that you're supposed to help because that's the only way the plan will work.</p> <p>Remember, not everyone is in the know or has trust. Places like neighborhood associations, churches are great places to build this trust and relationship.</p>	



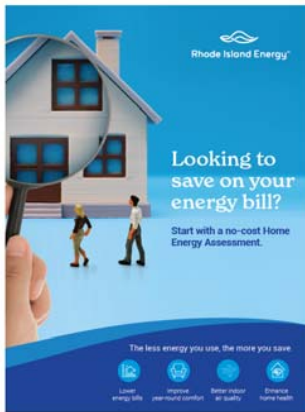
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# Rhode Island Energy Efficiency – Equity Update

Fourth Quarter Equity Update  
2/7/2023

1.1 All Residential and Income Eligible (IE) email and direct mail will more consistently be translated into both English and Spanish.

1.1 A New Flyer for EE Outreach with a focus on the home energy assessments and more in-depth information on how to identify which program customers qualify for as well as clear direction on where & how to participate has been created in English, Spanish and Portuguese.



1.1.b. Sample emails that have been sent out this year on behalf of the CAPS for customers on





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# Rhode Island Energy Efficiency – Equity Update

the income eligible rate and a market rate home energy assessment email.



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## Savings start with a no-cost home energy assessment.

*Haz click aquí para leer este mensaje en español  
Clique aqui para ler esta mensagem em português*

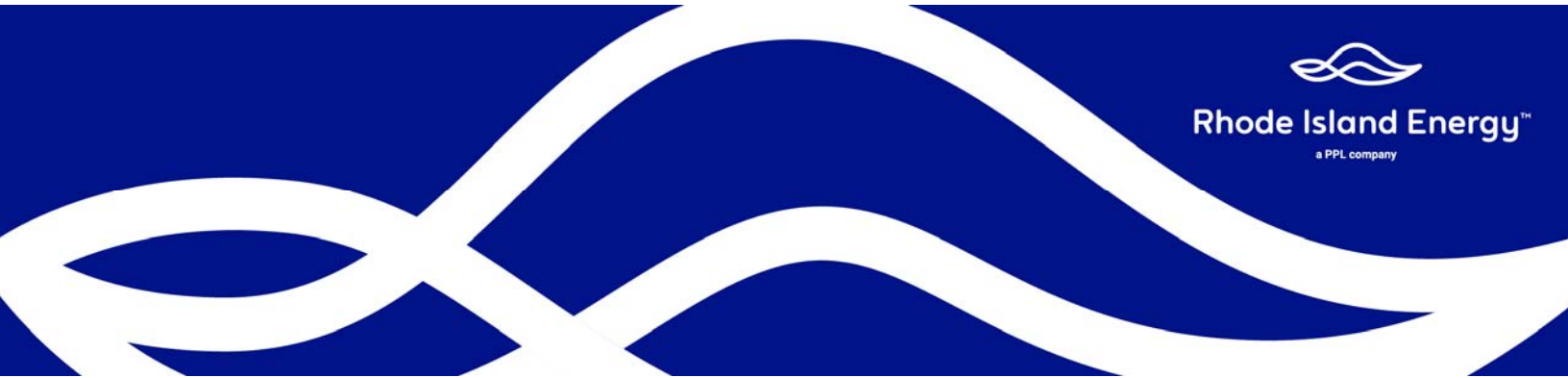
We know that a safe, comfortable, healthy, affordable home is important to you. A no-cost home energy assessment can help you save energy and money. Because after all, using less energy is good for you, and our environment.

As a thank you for completing the assessment, you will receive no-cost energy savings products such as:

- LED light bulbs
- Low-flow showerheads
- Faucet aerators

Plus, potential no-cost upgrades installed at follow-up appointments could include:

- Home insulation
- Air sealing of leaks
- Weather stripping
- Heating system replacement



## Rhode Island Energy Efficiency – Equity Update


A screenshot of a flyer for Rhode Island Energy. It features a list of four items: Refrigerator or freezer replacement, Dehumidifier replacement, Clothes washer replacement, and Window air conditioner replacement. Below the list, it says "To schedule your no-cost Home Energy Assessment, please call Eastbay Community Action Program at 1-401-437-1000." There is a blue button that says "Visit our website". At the bottom, it says "Rhode Island Energy" and has social media icons for Facebook, Twitter, and Instagram. A small disclaimer at the bottom reads: "This program is designed for income-eligible Rhode Island one- to four-unit homes. If you live in a building with five or more units in which at least half of the residents meet income-eligibility requirements, you may be eligible to be served by our multifamily program. Please have your landlord or condo association call 1-888-633-7947 to learn more. These programs are funded by the energy-efficiency charge on all customers' gas and electric bills, in accordance with Rhode Island law."

1.1.c Mailing to Income Eligible Customers



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# Rhode Island Energy Efficiency – Equity Update



**100% no-cost energy upgrades for you.**

**Actualizaciones de energía 100% sin costo para usted.**

**¿Necesita más ayuda?**

**Actualizações de energia a 100% sem custos para si.**

**Need more help?**

**Actualizaciones de energía 100% sin costo para usted.**

**¿Necesita más ayuda?**


**Actualizações de energia a 100% sem custos para si.**



**Actualizaciones de energía 100% sin costo para usted.**

**¿Necesita más ayuda?**

**Actualizações de energia a 100% sem custos para si.**



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**An energy-efficient home is a healthier, more comfortable home.**



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## Rhode Island Energy Efficiency – Equity Update



[Haga click aquí para leer este mensaje en español](#)  
[Clique aqui para ler esta mensagem em português](#)

Hey Providence, save 50% or more off approved insulation and air sealing up to \$4,000.

It all starts with a no-cost in-person [Home Energy Assessment](#). Our Energy Specialists will show you how to reduce energy usage and save money. Plus, get direct access to generous rebates on qualifying energy-efficient heating, cooling and water-heating equipment. You can even apply for 0% financing.

Join thousands of your Rhode Island neighbors already seeing the savings, comfort and convenience that start with a no-cost Home Energy Assessment:





## Rhode Island Energy Efficiency – Equity Update

In-person assessment

Lower energy usage  
year after year



Keep drafts, pollen  
and dust out



Lessen your  
environmental impact

Schedule your in-person Home Energy Assessment.

Schedule today

or

Call 1-888-633-7947



Follow us!



- Home Energy Assessment Email: 50.3% open rate
  - Home Energy Assessment: 105 customers clicked to read in Spanish or Portuguese, which is 0.52% of customers who opened the e-mail
- Income Eligible Energy Efficiency Email: 47.3% open rate
  - Income Eligible EE: 8 customers clicked to read in Spanish or Portuguese, which is 0.45% of customers who opened the e-mail



## Rhode Island Energy Efficiency – Equity Update

2.1 Provide additional energy efficiency program training to the Company's existing Customer Advocates so they can more effectively speak to the benefits of the programs.

Completed & ongoing. Existing consumer advocates were provided with more information and training on energy efficiency offerings. As the company continues to hire new advocates this training will continue.

2.2 Hire an additional Customer Advocate that will focus on promoting the energy efficiency programs. The new Customer Advocate will have community organizing experience and will be multi-lingual. The Advocate will deliver energy efficiency program information at community centers, faith-based organizations, multi-family housing, and other community gathering places. The Customer Advocate will leverage the expertise of existing community organizations that serve diverse households. The new hire will occur by mid-2022, before summer events begin.

Completed. Welcomed Valerie Chase, our new Energy Efficiency Customer Advocate. Valerie joins us from the Jurisdiction team where she oversaw the Community Giving Program and worked with organizations such as the Good Neighbor Energy Fund.

3.1 Provide vendor call centers with scripts to help answer any customer/landlord inquiries on this subject. Following is the messaging provided to intake for single family and multifamily scheduling of EnergyWise.

The role of the energy efficiency program vendor is to both educate and inform on qualitative efficiency measure opportunities. If conditions are safe, operable, and habitable for the customer, energy efficiency recommendations can be shared with the respective party. The energy efficiency program vendor should not be recommending any suggestions with respect to code violations they may encounter outside of severe safety concerns while in the customer's home as they are not trained, nor qualified to enforce code.

3.2 Consider adding the language to landlord outreach, as appropriate.




## Rhode Island Energy Efficiency – Equity Update

Consideration taken, but the Company is not yet comfortable with putting this understanding in print to landlords.


4. Develop age-appropriate marketing strategies to connect with various age groups that live in a household such as utilizing social media, apps, and text.

Following is a sampling of social media postings for energy efficiency. The spirit of the EWG was to ensure that the Company would reach a younger demographic that may not be reading bill inserts and paper mailings.

Published by Jessica Rosato · Jun 11, 2022 at 12:30 PM

 **RIE Facebook** Jun 11  
RIE Facebook · Update  
Running a fan takes a lot less energy than an air conditioner. When using them together, you can set your AC's thermostat slightly higher, while you save energy and stay cool. 😊

More info on #EnergySavings:  
<https://www.rienergy.com/RI-Home/Energy-Saving-Programs/rebate-programs>



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# Rhode Island Energy Efficiency – Equity Update

Published by Jessica Rosato · Jun 29, 2022 at 10:20 AM



**RIE Facebook**

Jun 29

RIE Facebook · Update

Save energy and money with our no-cost Home Energy Assessment.

<https://www.rienergy.com/RI-Home/Energy-Saving-Programs/Home-Energy-Assessments>

#SaveEnergy #EnergyEfficiency



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Published by Jessica Rosato · Jul 5, 2022 at 2:45 PM



**RIE Facebook**

Jul 05

RIE Facebook · Update

Use a smart thermostat to regulate your energy while you're away and still come back to a cool home. Check out our online marketplace for rebates:

<https://www.rienergy.com/RI-Home/Energy-Saving-Programs/rebate-programs>




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# Rhode Island Energy Efficiency – Equity Update

Published by Jessica Rosato · Jul 6, 2022 at 7:15 PM

 **RIE Facebook** Jul 06  
RIE Facebook · Update

With inflation on the rise, everyone is looking for [#WaysToSave](#). The good news is- you're in control. Here are a few things you can do to save energy & money:

- 💡 Turn off the lights
- 🎮 Unplug small appliances and gaming consoles when they're not in use
- 🍳 Fire up the grill instead of heating the oven
- 📄 Track your energy use at [RIEnergy.com](https://RIEnergy.com)
- ✅ Make a plan to save



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# Rhode Island Energy Efficiency – Equity Update

Published by Jessica Rosato · Jul 11, 2022 at 12:30 PM



**RIE Facebook**

Jul 11

RIE Facebook · Update

ENERGY STAR® certified room air conditioners use 10% less energy on average, and cost less than \$75/year to run. Best yet- if you're in the market for a new one, we offer a \$40 instant rebate.

Check it out:

<https://www.rienergy.com/RI-Home/Energy-Saving-Programs/rebate-programs>



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Published by Jessica Rosato · Jul 13, 2022 at 3:10 PM



**RIE Facebook**

Jul 13

RIE Facebook · Update

**#DYK?** Ever wonder why your energy use increases if you're not changing the temperature on your thermostat? Even if your thermostat is constantly set to 68 degrees, when the temperature outside rises, your system is using more energy to bring the indoor temp to that cool 68.



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# Rhode Island Energy Efficiency – Equity Update

Published by Jessica Rosato · Jul 16, 2022 at 12:35 PM



**RIE Facebook**

Jul 16

RIE Facebook · Update

Hotter temps are here, so what better time to upgrade your pool equipment? Find an [ENERGY STAR](#) certified pump and dive into savings. <https://www.rienergy.com/RI-Home/Energy-Saving-Programs/rebate-programs>

#EnergySavings #SaveEnergy #SaveMoney



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Published by Jessica Rosato · Jul 26, 2022 at 10:15 AM



**RIE Facebook**

23d

RIE Facebook · Update

Save energy and money by making your home more efficient. Check out our low and no-cost ways to save. <https://www.rienergy.com/RI-Home/Energy-Saving-Tips/Top-20-Tips>



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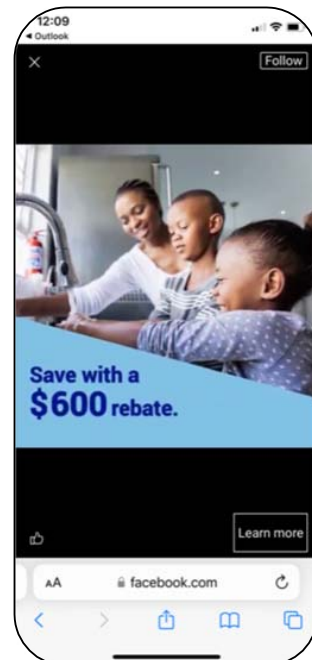
# Rhode Island Energy Efficiency – Equity Update

Published by Jessica Rosato · Aug 1, 2022 at 4:15 PM

**RIE Facebook** 16d  
RIE Facebook · Update  
Smart power strips can help you control the amount of energy your electronics use and keep your at-home workspace nice and tidy. More tips:  
<https://www.rienergy.com/RI-Home/Energy-Saving-Tips/>  
#EnergySavings #SaveEnergy #SaveMoney




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# Rhode Island Energy Efficiency – Equity Update



 Rhode Island Energy

We all want to save energy at home. In our all-new Marketplace, you can conserve and stay comfortable all summer long. Shop Advanced Power Strips today!




Save energy like a pro.

Power strip offers from \$6


Welcome to our all-new Marketplace.

 Rhode Island Energy


Shop energy-saving products on our all-new Marketplace experience, for a more efficient home today.



Shop the all-new Marketplace.

 Rhode Island Energy

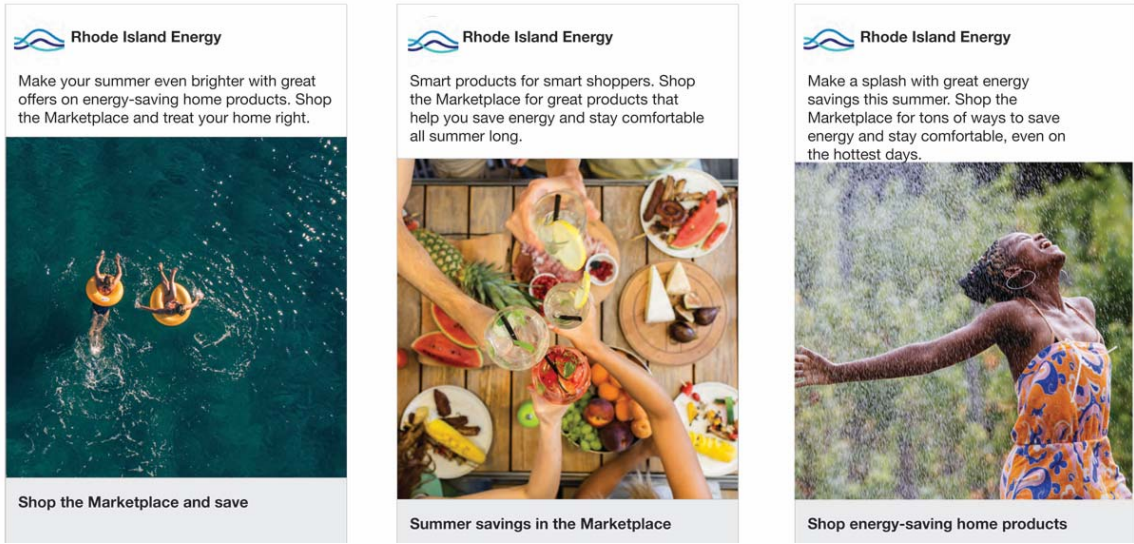
An all-new Marketplace. All the products you need for a more efficient home. Shop products that help you save energy every day.



We've set up a new shop for you.



# Rhode Island Energy Efficiency – Equity Update



5. By March 2022, establish a working group to explore how to more comprehensively leverage other home visiting programs for energy efficiency outreach and education. The working group will be facilitated by the Company and will include home visiting program representatives. The working group will make related recommendations for the 2023 Annual Energy Efficiency Plan.

The Equity Working Group stood up an Outreach and Engagement Subgroup. Following are the recommendations from this team of active stakeholders along with the commitments and metrics included by the company in the 2023 EE plan.

Recommendation 1: Promote energy efficiency at community gathering places and events	
Actions	Metrics
<ul style="list-style-type: none"> <li>EE consumer advocate will frequent community gathering places for face-to-face interactions with customers and will also</li> </ul>	<p><b>Metric 1:</b> Number of events hosted/attended by all consumer advocates (focus on underserved communities)</p>



## Rhode Island Energy Efficiency – Equity Update

<p>provide organizations with EE materials that can be distributed to customers</p> <ul style="list-style-type: none"> <li>All consumer advocates will be well versed in RIE’s EE program offerings so that they can also help promote the program and educate customers on the benefits of EE while they are out in the community</li> <li>Connect and coordinate with the City of Providence on the city’s efforts to develop Resilience Hubs throughout the city</li> </ul>	<p><b>Metric 2:</b> Number of customers reached at events</p> <p><b>Metric 3:</b> % of marketing &amp; education interactions with customers broken down by customer group</p> <p><b>Metric 4:</b> Number of coordinated events with the City of Providence at their Resilience Hubs</p>
<p><b>Recommendation 2:</b>  <b>Provide enhanced outreach, promotion, and education of all energy efficiency offerings in underserved communities</b></p>	
<p style="text-align: center;"><b>Actions</b></p>	<p style="text-align: center;"><b>Metrics</b></p>
<ul style="list-style-type: none"> <li>Rhode Island Energy will conduct <b>enhanced</b> outreach in 5 communities (Providence, East Providence, Pawtucket, Woonsocket, and Central Falls) with less than average participation and higher percentages of minority and renter populations</li> <li>Enhanced outreach includes a greater number of events and office hours hosted/attended in these areas and a focus on partnering with community organizations working within these areas with underserved customers</li> <li>Analyzing year-end spending on marketing and outreach to communities can ensure RIE can appropriately market programs to targeted communities to increase participation</li> </ul>	<p><b>Metric 1:</b> Increase participation in targeted communities (reported quarterly by zip code and by program)</p> <p><b>Metric 2:</b> Increase participation in programs disaggregated by all customer groups</p> <p><b>Metric 3:</b> % of marketing &amp; education interactions with customers broken down by customer group (e.g. number of requested translations, number of resources available in other languages – Portuguese, Creole, Hmong, etc.)</p> <p><b>Metric 4:</b> Track year-end spending by zip code on investments in marketing material and outreach</p>



## Rhode Island Energy Efficiency – Equity Update

Recommendation 3	
Partner with and cross train other home visiting programs and other community organizations/resource groups to expand the reach and impact of Rhode Island Energy’s energy efficiency programs:	
Actions	Metrics
<ul style="list-style-type: none"> <li>Establish and build relationships with community partners to better understand the needs of our customers and leverage their earned reputation as a trusted resource</li> <li>Provide energy efficiency training and collateral for community organizations, home visiting programs, state/municipal agencies, etc.</li> </ul>	<b>Metric 1:</b> Number of community partnerships established & organizations reached
	<b>Metric 2:</b> Number of trainings completed
	<b>Metric 3:</b> Number of referrals from community organizations (this could be expanded to include referral traffic to Rhode Island Energy’s website as well as to the RISE and CLEAResult sites)
	<b>Metric 4:</b> Development of a guiding resource for agencies and advocates to cross-train and support current and future staff

6.1. Continue to support municipality efforts to promote energy efficiency through the Community Initiative.

RIE is working with East Providence on a Community Initiative. The primary focus of East Providence is on Small Business and a main streets campaign will be run to meet that requested need. Residential will provide information that can be distributed with small businesses within East Providence and will also coordinate at customer facing events such as the Chamber of Commerce Touch a Truck event on 9/24/2022. RIE is also working to connect with the department of constituent affairs within the city to explore additional opportunities to reach residents.

7. The Company will expand collateral for more community groups that serve vulnerable populations.





## Rhode Island Energy Efficiency – Equity Update

The company has created new energy efficiency flyers (see item 1.2) that have been translated into both Portuguese and Spanish and will be shared with community groups. The company is currently awaiting the new flyers to be delivered so distribution may begin. Flyers will be distributed to libraries, senior centers, community centers, etc.

8. Expand follow-up outreach for customers who receive a recommendation from the on-line home energy assessment, in-home/virtual home energy assessment, and/or home energy reports.

In the Q2 report, the response cited that follow-up outreach was completed for in-home and virtual assessments. Below is a sample follow-up email for those two pathways

---

### Say YES to your insulation incentives!

**Receive 50% or more off your insulation expense**

Hi Susan

Thank you for taking the first step by participating in your home energy assessment. Now it's time to take the next step by completing the insulation recommendations we discussed.

Your offer is ready for you to review by clicking the button below. If you decide you'd like to move forward, simply sign.

**Review & Sign Your Insulation Contract**



# Rhode Island Energy Efficiency – Equity Update

## You Could Qualify for No-Cost Insulation

If your annual household income falls within the ranges listed below, you may qualify for an enhanced offer of **100% Incentivized Weatherization**.

Household Size	Pre-Tax Annual Household Income	Household Size	Pre-Tax Annual Household Income
1 person	\$33,646 - \$44,860	7 people	\$87,349 - \$116,464
2 people	\$43,998 - \$58,663	8 people	\$89,290 - \$119,052
3 people	\$54,351 - \$72,467	9 people	\$91,231 - \$121,640
4 people	\$64,703 - \$86,269	10 people	\$93,172 - \$124,228
5 people	\$85,408 - \$113,876	11 people	\$95,113 - \$126,816
6 people	\$87,349 - \$116,464	12 people	\$97,054 - \$129,404

[Apply for Enhanced Offer](#)

### Weatherization Barriers

In addition, check out the **Special Incentives** linked below to help you address any barriers to installing the weatherization work. These are noted on your insulation contract.

[Special Barrier Incentives](#)



Rhode Island Energy™

a PPL company

## Rhode Island Energy Efficiency – Equity Update

If you have any questions or would like to discuss your efficiency projects, please contact me or reply to this email.

For your convenience, your client number is #123456

Thank you in advance for your reply,

Eileen Barrett

**Energy Specialist | RISE**

[ebarrett@RISEngineering.com](mailto:ebarrett@RISEngineering.com)

401-290-8444

The online assessment was noted as being a manual process.

A follow up email and postcard was sent to customers identified as good candidates for a heating or water heating upgrade, based on online home energy assessment and in-person home energy assessment data. The e-mail is shown below:



# Rhode Island Energy Efficiency – Equity Update



Rhode Island Energy™  
a PPL company

We all love our little creature comforts.



[Haga clic aquí para leer este mensaje en español](#)  
[Clique aqui para ler esta mensagem em português](#)

Big rebates to help make your home more comfortable and energy efficient.

If your gas boiler, furnace or water heater needs replacing soon, now is the perfect time to upgrade with generous rebates from Rhode Island Energy. After your licensed heating contractor or plumber completes the installation, you may qualify for one of the following rebates:

Bring your costs down with qualifying high-efficiency:



Combination Boiler-Water Heaters  
Get up to \$1,200 rebate



Boilers  
Get up to \$800 rebate



Water Heaters  
Get up to \$600 rebate



Furnaces  
Get up to \$500 rebate

[Apply now](#)

Rebates are available on qualifying equipment to Rhode Island Energy residential gas customers through 12/31/22. Rebate applications must be submitted within 90 days of completion of work and by 1/31/23. These programs are funded by the energy-efficiency charge on all customers' gas and electric bills, in accordance with Rhode Island law.

Follow us!





Rhode Island Energy™  
a PPL company

# Rhode Island Energy Efficiency – Equity Update

The postcard is shown below:



Replace your aging heating and water heating equipment with high-efficiency models.

If your gas boiler, furnace or water heater needs replacing soon, now is the perfect time to upgrade. Rhode Island Energy offers rebates of up to \$1,200.



**We can help make your home more comfortable and energy efficient.**

We can help you with rebates that will bring your costs down and efficiency up:

Combination Boiler-Water Heaters	Boilers	High-Efficiency Water Heaters	Furnaces
Get up to <b>\$1,200</b> rebate	Get up to <b>\$800</b> rebate	Get up to <b>\$600</b> rebate	Get up to <b>\$500</b> rebate

Once your licensed heating contractor or plumber installs the qualifying energy efficient equipment you can apply for a rebate online or through our mail-in rebate form.

To learn more, visit [rienrgy.com/riheat](http://rienrgy.com/riheat) or call 1-800-292-2032.

Rebates are available on qualifying equipment to Rhode Island Energy residential gas customers through 12/31/22. Rebate applications must be submitted within 90 days of completion of work and by 1/31/23. Visit [rienrgy.com/riheat](http://rienrgy.com/riheat). These programs are funded by the energy efficiency charge on all customers' gas and electric bills, in accordance with Rhode Island law.

Rhode Island Energy™  
280 Melrose Street  
Providence, RI 02907-2152

Postnet First Class  
U.S. Postage Paid  
N. Reading, MA  
Permit #211



# Rhode Island Energy Efficiency – Equity Update

9. Benchmark Energy Efficiency Program participation data for race, geography, socioeconomic status, language, age of home, age of owner, age of renter, heating fuel type, type and age of heating /hot water/cooling systems.

9. 1. Completion of the Participant, Nonparticipant, and MF Census studies. Yes

9. 2. Presentation of report results at a public meeting, such as the Energy Efficiency Resource Management Council (EERMC). Presented at EWG and EERMC.

9. 3. Creation of a regular, zip code level participation report by Q2 2022 to target outreach for the EnergyWise, MF, and Income Eligible Single-Family programs. Following is the EnergyWise information.

Municipality	2022 EnergyWise Number of Home Energy Assessments
Albion	1
Arcadia	1
Ashaway	11
Barrington	82
Bradford	9
Bristol	68
Burrillville	9
Carolina	4
Centerdale	1
Central Falls	23
Charlestown	22
Chepachet	17
Clayville	3
Coventry	103
Cranston	292
Cumberland	132
East Greenwich	87
East Providence	54
Esmond	17
Exeter	12
Forestdale	2
Foster	11
Glendale	5



## Rhode Island Energy Efficiency – Equity Update

Glocester	18
Greene	3
Greenville	1
Greenville	29
Harmony	2
Hope	16
Hope Valley	9
Hopkinton	6
Jamestown	37
Johnston	116
Kenyon	1
Kingston	3
L Compton	6
Lincoln	80
Little Compton	1
Manville	11
Mapleville	4
Middletown	46
Misquamicut	2
Narragansett	79
Newport	77
North Kingstown	124
North Providence	91
North Scituate	19
North Smithfield	42
Pawtucket	201
Peace Dale	8
Portsmouth	75
Providence	462
Prudence Island	1
Quonset	1
Richmond	3
Riverside	71
Rumford	36
Saunderstown	24
Scituate	12
Shannock	2
Slatersville	11
Slocum	1
Smithfield	11
South Kingstown	5



## Rhode Island Energy Efficiency – Equity Update

Tiverton	73
Wakefield	89
Warren	45
Warwick	350
West Greenwich	22
West Kingston	13
West Warwick	104
Westerly	64
Woonsocket	119
Wyoming	3

Municipality	2022 Number of EnerGWise Weatherizations
Albion	2
Ashaway	13
Barrington	137
Bradford	13
Bristol	96
Burrillville	15
Carolina	7
Central Falls	8
Charlestown	50
Chepachet	18
Coventry	147
Cranston	394
Cumberland	155
East Greenwich	122
East Providence	85
Escoheag	1
Esmond	34
Exeter	29
Fiskeville	1
Forestdale	3
Foster	12
Glendale	9
Glocester	17
Greene	5
Greenville	40
Harmony	1
Harrisville	2
Hope	13





# Rhode Island Energy Efficiency – Equity Update

Hope Valley	16
Hopkinton	1
Jamestown	37
Johnston	138
Kenyon	2
Kingston	10
L Compton	2
Lincoln	86
Little Compton	17
Manville	8
Mapleville	5
Middletown	76
Misquamicut	4
Narragansett	85
Newport	98
North Kingstown	150
North Providence	154
North Scituate	36
North Smithfield	57
Noth Providence	1
Oakland	4
Pascoag	1
Pawtucket	215
Peace Dale	14
Peacedale	1
Portsmouth	109
Providence	479
Prudence Island	2
Riverside	90
Rumford	65
Saunderstown	27
Scituate	14
Slatersville	9
Slocum	1
Smithfield	25
South Kingston	1
South Kingstown	11
Tiverton	81
Wakefield	127
Warren	53
Warwick	438



## Rhode Island Energy Efficiency – Equity Update

West Greenwich	44
West Kingston	19
West Warwick	131
Westerly	99
Wood River Jt	1
Wood River	
Junction	1
Woonsocket	89
Wyoming	7

Municipality	IES SF Assessments
ASHAWAY	4
BARRINGTON	15
BRADFORD	11
BRISTOL	20
BURRILLVILLE	12
CAROLINA	2
CENTRAL FALLS	6
CHARLESTOWN	15
CHEPACHET	24
COVENTRY	85
CRANSTON	493
CUMBERLAND	7
EAST GREENWICH	12
EAST PROVIDENCE	50
ESMOND	52
EXETER	12
FISKEVILLE	1
FOSTER	6
GLENDALE	1
GLOCESTER	19
GREENE	7
GREENVILLE	28
HARMONY	2
HOPE	11
HOPE VALLEY	10
HOPKINTON	3
JAMESTOWN	8
JOHNSTON	269
KINGSTON	2
L COMPTON	4



## Rhode Island Energy Efficiency – Equity Update

LINCOLN	14
MANVILLE	1
MAPLEVILLE	21
MIDDLETOWN	16
NARRAGANSETT	23
NEWPORT	17
NORTH KINGSTOWN	57
NORTH PROVIDENCE	334
NORTH SCITUATE	16
NORTH SMITHFIELD	9
OAKLAND	1
PAWTUCKET	91
PEACE DALE	1
PORTSMOUTH	17
PROVIDENCE	203
RIVERSIDE	39
RUMFORD	19
SAUNDERSTOWN	5
SCITUATE	5
SHANNOCK	3
SMITHFIELD	11
TIVERTON	51
WAKEFIELD	31
WARREN	20
WARWICK	235
WEST GREENWICH	11
WEST KINGSTON	12
WEST WARWICK	57
WESTERLY	70
WOOD RIVER JT	7
WOONSOCKET	5
WYOMING	2

Municipality	IES SF Weatherizations
ASHAWAY	3
BARRINGTON	1
BRADFORD	2
BRISTOL	5
BURRILLVILLE	3
CENTRAL FALLS	15



# Rhode Island Energy Efficiency – Equity Update

CHARLESTOWN	4
CHEPACHET	8
COVENTRY	15
CRANSTON	134
CUMBERLAND	20
EAST GREENWICH	1
EAST PROVIDENCE	13
ESMOND	4
EXETER	8
FORESTDALE	2
FOSTER	5
GLOCESTER	2
GREENVILLE	2
HOPE	3
HOPE VALLEY	6
HOPKINTON	3
JAMESTOWN	1
JOHNSTON	36
L COMPTON	1
LINCOLN	16
MAPLEVILLE	6
MIDDLETOWN	5
NARRAGANSETT	6
NEWPORT	2
NORTH KINGSTOWN	18
NORTH PROVIDENCE	36
NORTH SCITUATE	3
NORTH SMITHFIELD	7
PAWTUCKET	91
PORTSMOUTH	7
PROVIDENCE	127
RIVERSIDE	17
ROCKVILLE	1
RUMFORD	8
SHANNOCK	1
SLATERSVILLE	1
SOUTH KINGSTOWN	1
TIVERTON	21



## Rhode Island Energy Efficiency – Equity Update

WAKEFIELD	10
WARREN	7
WARWICK	54
WEST GREENWICH	1
WEST KINGSTON	2
WEST WARWICK	25
WESTERLY	15
WOONSOCKET	26
WYOMING	1

9. 4. Whether or not rental unit participation data continues to be gathered and reported quarterly at the "sector level meetings". Reported in Q2 report for EW. Through Q4, 12% of assessments and 11% of weatherization participants are renters/landlords.

For Income Eligible single family, 30% of the assessments are for renters and 15% of weatherization participants are renters/landlords.

10. Track late payments and shut offs.

National Grid currently tracks this information and submits it to the RI PUC. The report can be found at: <http://www.ripuc.ri.gov/eventsactions/docket/4770page.html>, under Other Compliance Reports, National Grid's Low-Income Monthly pursuant to Article II, Section C.22.f. of the Amended Settlement Agreement.

11. Align energy efficiency programs with healthcare and partner to achieve healthcare goals, promote further engagement, and sharing health outcome and impact data.

Partnered with RI Dept of Health to provide training and materials for their staff who provide in home services for clients so they could speak to additional health benefits of weatherizing their homes and refer clients to our home energy assessment vendors (CLEAResult and RISE).

12. Perform a full review of all HR policies and remove outdated policies that restrict hiring such as background checks.

The discussion with the Equity Working Group (EWG) centered around the Company's background check policies for contractors to the energy efficiency programs. Some EWG



## Rhode Island Energy Efficiency – Equity Update

members that felt that a background check would be a disincentive for applicants to apply for open opportunities. A particular area of concern centered around the 5 panel drug screening which included marijuana as one of the drugs that was screened.

In review of the background check requirements, the Company felt that a level 2 background check was warranted particularly when contractors could be in a customer's home for several hours during a home energy assessment. After listening to the EWG concerns, in 2022 the background check has moved to a 4 panel drug screen which does not include marijuana.

13. Reduce barriers to professional development, as well as entry into the energy efficiency workforce.

13.1 The RI Workforce Needs Assessment has begun. Our vendor, BW Research, has created 3 surveys (potential workforce survey, current worker survey and employer survey) with input from RIE and OER which are set to go out by the end of this month. Results of the survey expected by March.

13.2. Continue the lead vendor collaboration with the RI Builders Association, and their affiliate Residential Construction Workforce Partnership, to complete at least two additional Energy Efficiency Program related trainings in 2022. RI Builders Association will report participant demographic information to the Company from the September 2021 training. If necessary, the Company will assist in the targeted recruitment of more diverse trainees for 2022. During 2022, the Company and/or its vendors will also collaborate with the RI Dept of Human Services (DHS) on workforce development efforts from U.S. Department of Energy training funds. RI DHS will also report participant demographic information to the Company, so the Company can assist in the targeted recruitment of more diverse trainees, if necessary.

Completed first cohort. 6 hires EE partners with 2 more hires pending. Second cohort is being trained and EE education is included.

14. Collaborate with local diverse community organizations to train and certify potential workers (Progresso Latino, Hispanic chamber of commerce, Cape Verdean community development).

See recommendation 13. The new workforce development needs assessment, as well as demographic reporting from the new trainings, will help to determine new recruitment and upskilling efforts with a focus on diversity are necessary.



# Rhode Island Energy Efficiency – Equity Update

Second Quarter Equity Update  
 08/01/2023

Rhode Island Energy will continue tracking the following 2022 Equity metrics in Q2 and Q4 of 2023.

- Assessment and Weatherization participation by town
- Single family participation in EnergyWise and Income Eligible Services programs by town

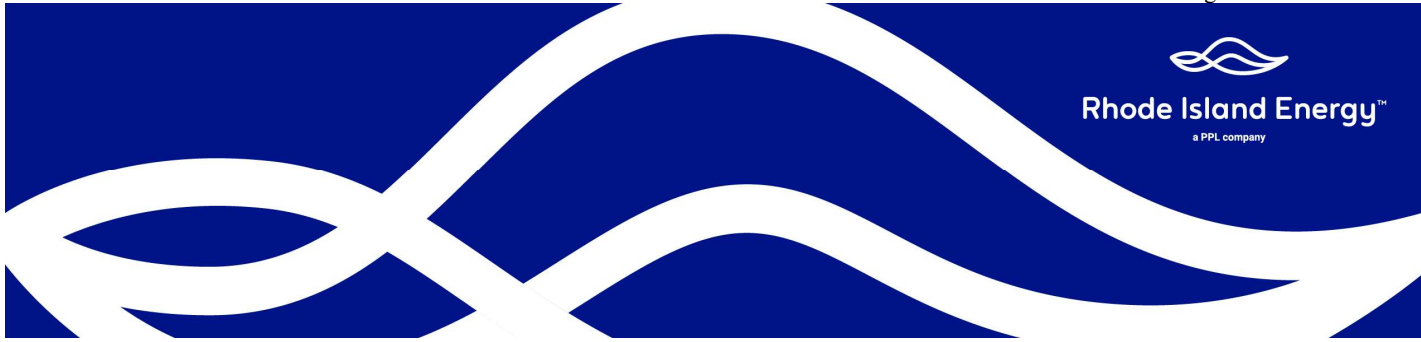
Municipality	EnergyWise HEA Participation 2023 through Q2
Adamsville	1
Ashaway	11
Barrington	88
Bradford	8
Bristol	101
Burrillville	12
Carolina	7
Central Falls	12
Charlestown	56
Chepachet	22
Coventry	153
Cranston	397
Cumberland	176
East Greenwich	150
East Providence	77
Esmond	27
Exeter	25
Forestdale	6
Foster	33
Glendale	2
Glocester	23
Greene	13
Greenville	33
Harmony	1
Harrisville	1
Hope	28
Hope Valley	24
Hopkinton	9
Jameston	1



## Rhode Island Energy Efficiency – Equity Update

Jamestown	51
Johnston	134
Kenyon	2
Kingston	7
L Compton	5
Lincoln	96
Little Compton	40
Manville	9
Mapleville	4
Middletown	55
Narragansett	96
Newport	100
North Kingstown	134
North Providence	134
North Scituate	32
North Smithfield	61
Oakland	4
Pawtucket	241
Peace Dale	14
Peacedale	5
Portsmouth	109
Providence	525
Prudence Isl	2
Prudence Island	1
Richmond	5
Riverside	89
Rockville	1
Rumford	40
Saunderstown	32
Scituate	18
Shannock	2
Slatersville	4
Smithfield	21
South Kingstown	8
Tiverton	85
Wakefield	120
Warren	43
Warren	1
Warwick	391
Weekapaug	1
West Greenwich	38





## Rhode Island Energy Efficiency – Equity Update

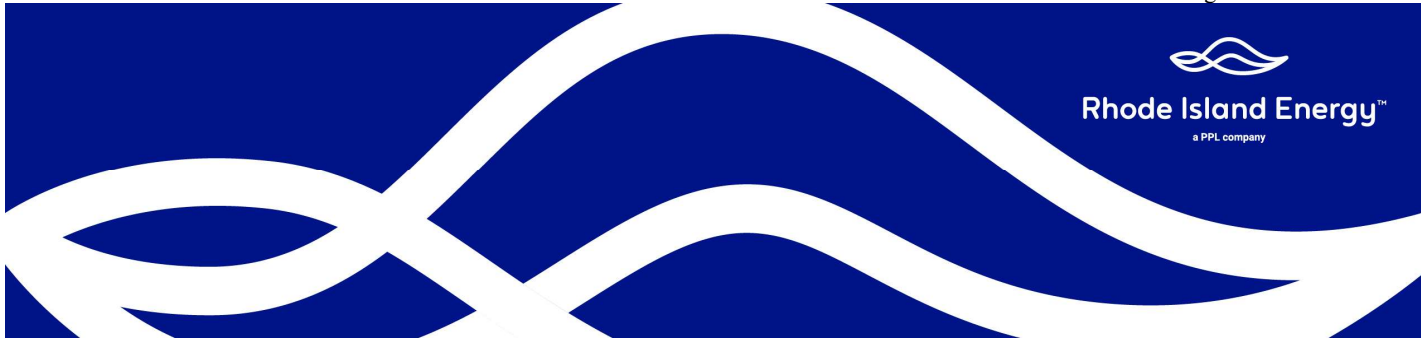
West Kingston	19
West Warwick	106
Westerly	116
Wood River Jt	2
Wood River Junction	1
Woonsocket	128
Wyoming	11

Municipality	EnergyWise Weatherization Participation 2023 through Q2
Ashaway	2
Barrington	43
Bristol	37
Burrillville	2
Central Falls	2
Charlestown	7
Chepachet	6
Clayville	1
Coventry	55
Cranston	105
Cumberland	64
East Greenwich	40
East Providence	25
Esmond	7
Exeter	6
Foster	10
Glendale	1
Glocester	8
Greene	2
Greenville	15
Hope	4
Hope Valley	1
Hopkinton	2
Jamestown	14
Johnston	39
Kenyon	1
Kingston	3



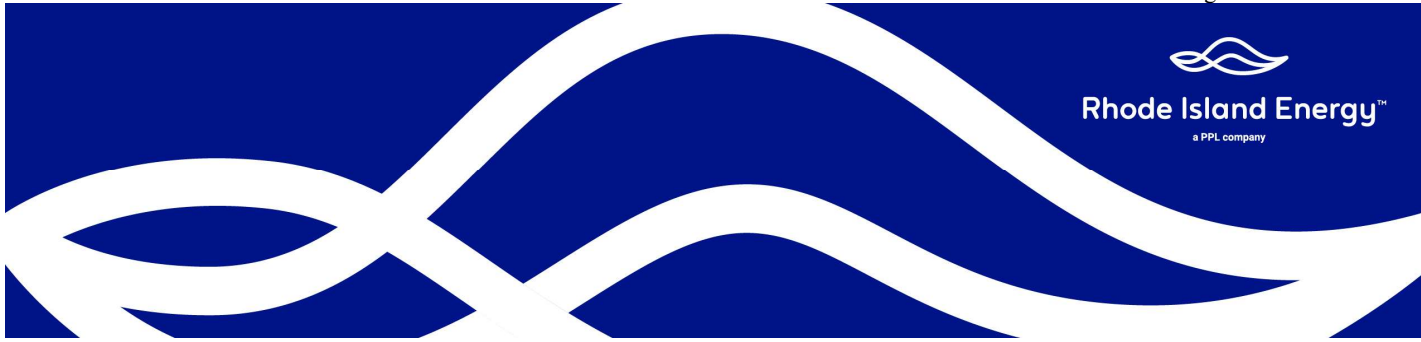
## Rhode Island Energy Efficiency – Equity Update

Lincoln	21
Little Compton	6
Manville	3
Mapleville	3
Middletown	20
Narragansett	28
Newport	16
North	
Kingstown	39
North	
Providence	33
North Scituate	6
North	
Smithfield	8
Pawtucket	75
Peace Dale	2
Portsmouth	30
Providence	115
Prudence	
Island	1
Richmond	4
Riverside	27
Rumford	20
Saunderstown	11
Scituate	2
Smithfield	10
South	
Kingstown	2
Tiverton	15
Wakefield	25
Warren	30
Warwick	123
West	
Greenwich	11
West Kingston	6
West Warwick	36
Westerly	24
Woonsocket	26
Wyoming	3



## Rhode Island Energy Efficiency – Equity Update

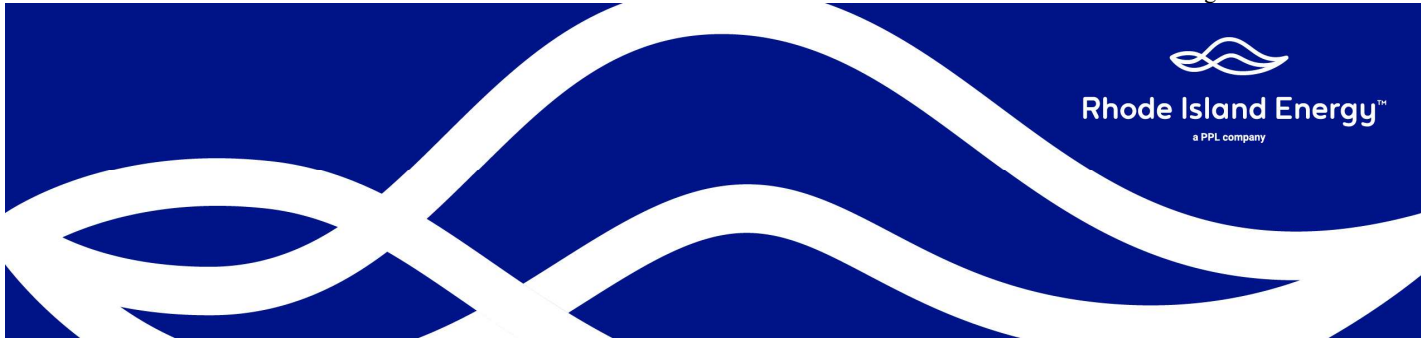
Municipality	Income Eligible Services HEA Participation 2023 through Q2
ASHAWAY	5
BARRINGTON	5
BRISTOL	1
BURRILLVILLE	3
CAROLINA	1
CHARLESTOWN	5
CHEPACHET	1
CLAYVILLE	1
COVENTRY	8
CRANSTON	154
CUMBERLAND	2
EAST GREENWICH	2
EAST PROVIDENCE	15
ESMOND	6
EXETER	2
FOSTER	6
FOSTER CENTER	1
GLOCESTER	2
GREENVILLE	6
HOPE	6
HOPE VALLEY	2
HOPKINTON	2
JAMESTOWN	4
JOHNSTON	36
L COMPTON	2
LINCOLN	2
MANVILLE	1
MAPLEVILLE	1
MIDDLETOWN	3
NARRAGANSETT	5
NEWPORT	1
NORTH KINGSTOWN	12
NORTH PROVIDENCE	46
NORTH SCITUATE	4
OAKLAND	2
PAWTUCKET	16
PEACE DALE	1



## Rhode Island Energy Efficiency – Equity Update

PORTSMOUTH	5
PROVIDENCE	36
RIVERSIDE	9
RUMFORD	4
SAUNDERSTOWN	1
SCITUATE	2
SMITHFIELD	2
TIVERTON	19
WAKEFIELD	6
WARREN	8
WARWICK	26
WEST GREENWICH	3
WEST KINGSTON	3
WEST WARWICK	15
WESTERLY	8
WYOMING	1

Municipality	Income Eligible Services Wx Participation 2023 through Q2
ASHAWAY	1
BARRINGTON	2
BRADFORD	1
CAROLINA	1
CENTRAL FALLS	5
CHARLESTOWN	1
CHEPACHET	3
COVENTRY	7
CRANSTON	40
CUMBERLAND	2
EAST PROVIDENCE	2
GREENVILLE	3
HOPE	1
JAMESTOWN	1
JOHNSTON	12
MAPLEVILLE	1
MIDDLETOWN	1
NARRAGANSETT	3
NEWPORT	2
NORTH KINGSTOWN	8



## Rhode Island Energy Efficiency – Equity Update

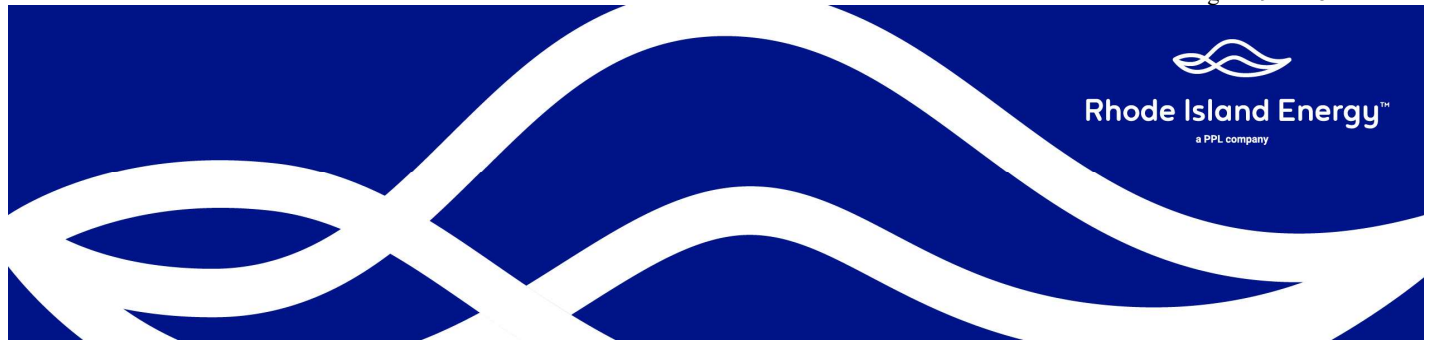
NORTH	
PROVIDENCE	10
NORTH SCITUATE	3
NORTH	
SMITHFIELD	2
PAWTUCKET	13
PORTSMOUTH	3
PROVIDENCE	46
RIVERSIDE	7
TIVERTON	3
WAKEFIELD	3
WARREN	1
WARWICK	27
WEST KINGSTON	3
WEST WARWICK	2
WESTERLY	2
WOOD RIVER JT	1
WOONSOCKET	2

- EnergyWise and Income Eligible Services single family owner versus renter information

Through Q2, 2023, EnergyWise had 12.7% renter participation in HEAs and 10.2% landlord/renter weatherization participation.

The Income Eligible Services program had 29.8% renter participation in HEAs and 15.6% renter/landlord weatherization participation.

- Energy Efficiency outreach and education with other community organizations
  - Outreaches at Customer Assistance Expos include:
    - Davinci Center – Providence
    - Woonsocket Public Library – Woonsocket
    - Blackstone Valley Prep – Cumberland
    - West Warwick Senior Center – West Warwick- co-sponsored with Representative Noret
    - East Providence Public Library – East Providence
  - Earth Day Employee event at Ocean State Job Lot



## Rhode Island Energy Efficiency – Equity Update

- Aging in Place Resource Fair – Jamestown
- Non-Violence Institute Resource Fair – Providence
- Carbon Footprint Fair – Cumberland
- Ocean State Center for Independent Living Lunch and Learn – Warwick
- VA Career Fair – Providence
- Progresso Latino – Central Falls
- RI Department of Health
- Organizations targeting to conduct EE training:
  - Davinci Center
  - Woonsocket/Pawtucket YMCA
  - Providence YMCA
  - Project Hope/Diocese of Providence
  - Progresso Latino
  - Housing Network of RI
  - Housing Works RI
  - Dorcas
  - East Providence Senior Center
  - Cranston YMCA
  - United Way 2-1-1
  - Family Service of RI
  - City of East Providence Constituent Services
  - Woonsocket Constituent Services
  - Central Falls Constituent Services
  - Habitat for Humanity



## Rhode Island Energy Efficiency – Equity Update

2023 Equity Outreach & Engagement
Increase cross-training of Customer Advocates, CAP agencies, and other home-visiting programs (WIC, lead, etc.) to better understand available programs and services for both energy efficiency and health/well-being – <i>Ongoing, see list above of organizations working with to expand engagement</i>
Continue to meet communities where they are at through enhancing promotion and education, which includes the translation of resources and trainings into other languages such as Spanish, Portuguese, Hmong, Creole, etc. – <i>Moderate Income promotion receiving a lot of traction. RGGI funds of \$1,125,00 fully subscribed with significant number of moderate income customers weatherization pending. Majority of email outreach to customers in English, Spanish, and Portuguese.</i>
Have X amount staff members attend/host X amount of events in communities and host “office hours” or tabling events to answer any questions and make connections. This should be done at community gathering places such as food pantries, churches, back to school events, local parks and community events. – <i>Ongoing, see list of outreaches and engagement above.</i>

2023 Equity Workforce Development & Training
Continue to support and fund programs like RIBA’s Residential Construction Workforce Partnership – <i>Supporting Residential Construction Workforce Partnership with \$40,000 in training funding for 2023.</i>
Set concrete goals for minority/women-owned business hiring or spending. – <i>Will work with EWG to set target.</i>
Continue to coordinate and partner with community-based organizations and minority business organizations - <i>Ongoing</i>



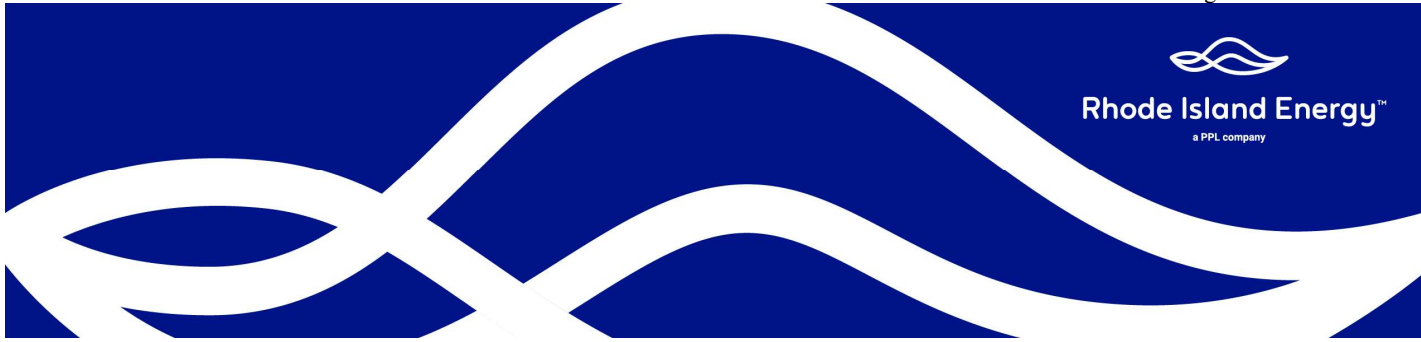
## Rhode Island Energy Efficiency – Equity Update

Create an internship program or build upon existing efforts to focus on residents (both high school/vocational students and adults) of Environmental Justice (EJ) communities and other underrepresented groups to join the energy workforce – *RIE recruiting at Community Job Fair. Northern Rhode Island Chamber of Commerce is partnering with the Rhode Island Hispanic Chamber of Commerce, the City of Central Falls, and Rhode Island College to host a Community Job Fair! Also attended the VA Career Fair.*

Develop inclusive marketing tools and strategies about career pathways that have information on trainings, wages, and market opportunities – *Part of ongoing Workforce Development. RIE has hired a Manager of Diversity, Equity, and Inclusion focused on recruiting a Diverse workforce.*

In addition to continuing to support WFD and training programs, research and survey current training hubs to get a better idea on training needs and support needed to have more access to job opportunities and continue training – *Workforce Needs Assessment completed.*





## Rhode Island Energy Efficiency – Equity Update

A sample of a moderate income email and letter sent to residents in the five equity communities is shown below as well as open rates from the email.

Town	Send Date	Opens	Open Rate	Spanish (clicked "Haga click aquí para leer este mensaje en español")	Portuguese (clicked "Clique aqui para ler esta mensagem em português")
Central Falls Residential	Mon 7/10	1,241	42%	9	2
Central Falls Discount Rate	Tue 7/11	383	48%	4	0
Pawtucket Residential Drop 1	Mon 7/17	4,388	41%	5	2
Pawtucket Residential Drop 2	Wed 7/19	2,760	45%	2	0
Pawtucket Discount Rate	Wed 7/19	1,298	48%	4	4
Woonsocket Residential	Mon 7/24	3,800	42%	1	1
Woonsocket Discount Rate	Mon 7/24	744	43%	2	1
<b>Total</b>	<b>Total</b>	<b>14,614</b>	<b>43%</b>	<b>27</b>	<b>10</b>



# Rhode Island Energy Efficiency – Equity Update



T23\*\*B04\*\*0208\*\*\*\*\*MIXED AADC 021  
Giovanni Carmona  
Or Current Resident



## Central Falls residents may qualify for 100% off energy efficiency upgrades.

Dear Valued Customer,

As a Rhode Island Energy customer, whether you're a homeowner, renter or landlord, you can enjoy lower energy costs and a more comfortable home.

It all starts with a no cost Home Energy Assessment, where our Energy Specialists provide a personalized plan to show how you can take advantage of 100% no cost energy efficiency upgrades, year-round savings and rebates.

- Enjoy no cost air sealing.
- Receive 50% or more off approved home insulation (up to \$4,000).
  - Income qualified homeowners may be eligible\* for 100% off approved insulation (up to \$15,000).
  - Renters and landlords of one- to four-unit properties may qualify for 100% off approved insulation (up to \$4,000 per unit).
- Get access to generous rebates on qualifying energy efficient products—up to \$2,750.
- Apply for a 0% interest loan for eligible energy efficiency improvements.

If you've already had a Home Energy Assessment, consider upgrading your heating, cooling or water heating equipment and claiming generous rebates from Rhode Island Energy. Visit [rienergy.com/comfort](http://rienergy.com/comfort) to learn more.

**If you're a homeowner, renter or landlord who hasn't completed a Home Energy Assessment, call 1-888-633-7947 to schedule yours today.**



This program is designed for Rhode Island one- to four-unit homes. If you live in a building with 5+ units, you may be eligible through the multifamily program. Landlords of 5+ units or condo associations can call 1-888-633-7947 to learn more. These programs are funded by the energy efficiency charge on all customers' gas and electric bills, in accordance with Rhode Island law.

This program is offered by Narragansett Electric Company d/b/a Rhode Island Energy for eligible customers in the company's Rhode Island service territory.

\*For example, a landlord of four with a pre-tax annual household income of \$14,000 - \$41,000 is eligible for the income qualified offer. Please call 1-888-633-7947 for the full income guidelines.





# Rhode Island Energy Efficiency – Equity Update





**Rhode Island Energy™**  
a PPL company

200 Mispou Street  
Providence, RI 02907 | 1-888-633-7947  
rienergy.com

### Los residentes de Central Falls pueden calificar para un 100% de descuento en actualizaciones de eficiencia energética.

Estimado cliente valioso:

Como cliente de Rhode Island Energy, ya sea propietario, inquilino o arrendador de una vivienda, puede disfrutar de costos de energía más bajos y de un hogar más cómodo.

Todo comienza con una Evaluación de energía del hogar sin costo, donde nuestros especialistas en energía brindan un plan personalizado para mostrar cómo puede aprovechar las actualizaciones de eficiencia energética 100% sin costo, y los ahorros y reembolsos durante todo el año.

- Disfrute del solado de aire sin costo alguno
- Obtenga un 50% o más de descuento en aislamiento aprobado para el hogar (hasta \$4,000)
  - Los propietarios de viviendas que cumplan los requisitos de ingresos pueden ser elegibles\* para 100% de descuento en aislamiento aprobado (hasta \$15,000).
  - Los propietarios e inquilinos de propiedades de una a cuatro unidades pueden calificar para un 100% de descuento en aislamiento aprobado (hasta \$4,000 por unidad).
- Obtenga acceso a generosos reembolsos en productos de bajo consumo que califiquen, hasta \$2,750
- Solicite un préstamo con 0% de interés para mejoras elegibles de eficiencia energética.

Si ya ha realizado una Evaluación de energía del hogar, considere actualizar su equipo de calefacción, refrigeración o calentamiento de agua y reciba generosos reembolsos de Rhode Island Energy. Visite [rienergy.com/comfort](http://rienergy.com/comfort) para obtener más información.

**Si es propietario, inquilino o arrendador de una vivienda y no ha completado una Evaluación de energía del hogar, llame al 1-888-633-7947 para programar la suya hoy mismo.**



Este programa está diseñado para hogares de una a cuatro unidades de Rhode Island. Si vive en un edificio con 5 unidades o más, puede ser elegible a través del programa multifamiliar de propietarios de 5 unidades o más o las asociaciones de condominios pueden llamar al 1-888-633-7947 para obtener más información. Este programa se financia con el cargo por eficiencia energética que se aplica en las facturas de gas y electricidad de todos los clientes de centralización de los servicios de Rhode Island.

Este programa es ofrecido por Narragansett Electric Company que opera con el nombre comercial Rhode Island Energy para clientes elegibles en el territorio de servicio de la compañía en Rhode Island.  
\*No se aplica una tarifa de costo promedio con un ingreso familiar anual antes de impuestos de \$65,400 o \$87,200 es elegible para la oferta. Base de ver los ingresos. Llame al 1-888-633-7947 para conocer los pasos de ingresos completos.





# Rhode Island Energy Efficiency – Equity Update



200 Milford Street  
Providence, RI 02907 | 1 800 633 7947  
rienergy.com

## Os residentes em Central Falls podem ser elegíveis para a obtenção de um desconto de 100% em melhorias de eficiência energética.

Estimado Cliente,

Enquanto cliente da Rhode Island Energy, quer seja um proprietário, inquilino ou senhorio, pode usufruir de custos de energia mais baixos e de uma casa mais confortável.

Tudo começa com uma avaliação do consumo doméstico de energia gratuita, na qual os nossos especialistas em energia elaboram um plano personalizado para mostrar como pode tirar partido das melhorias de eficiência energética e das poupanças e descontos durante todo o ano, sem qualquer custo:

- Desfrute de uma impermeabilização gratuita.
- Obtenha um desconto de 50% ou superior em isolamento doméstico aprovado (até 4000 \$).
  - Os proprietários qualificados com base no rendimento podem ser elegíveis\* para um desconto de 100% em isolamento aprovado (até 15.000 \$).
  - Os inquilinos e senhorios de propriedades com uma a quatro unidades podem ser elegíveis para a obtenção de um desconto de 100% em isolamento aprovado (até 4000 \$ por unidade).
- Obtenha acesso a descontos generosos em produtos de eficiência energética elegíveis, até 2760 \$.
- Candidate-se a um empréstimo com 0% de juros para melhorias energeticamente eficientes.

Se já realizou uma avaliação do consumo doméstico de energia, pondere melhorar o seu equipamento de aquecimento, arrefecimento ou aquecimento da água e obtenha descontos generosos da Rhode Island Energy. Aceda a [rienergy.com/comfort](http://rienergy.com/comfort) para saber mais.

Se for um proprietário, inquilino ou senhorio e ainda não tiver realizado uma avaliação do consumo doméstico de energia, ligue para 1-800-633-7947 para marcar já a sua.

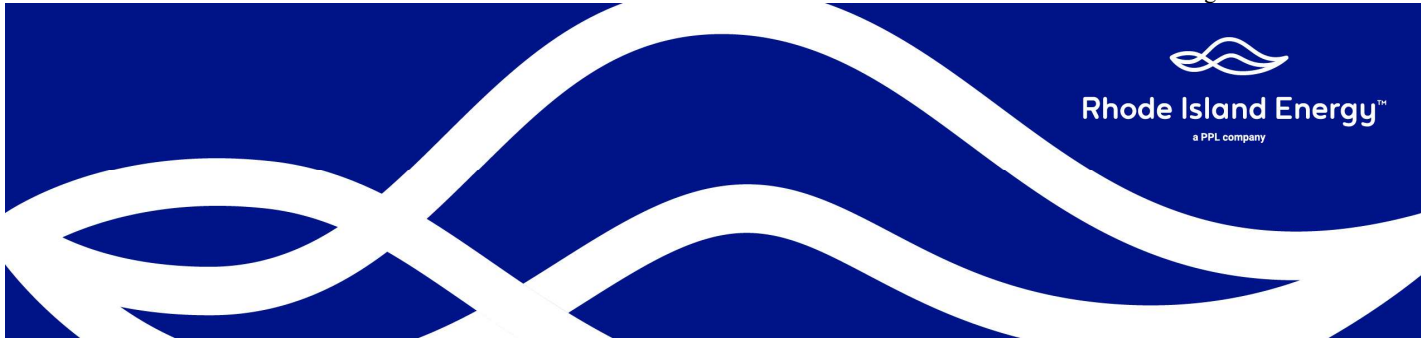


Este programa foi concebido para casas em Rhode Island com uma a quatro unidades elegíveis. Se viver num prédio com mais de 4 unidades, pode ser elegível para o nosso programa multifamílias, verifique de mais de 8 unidades, ou a associação de condóminos podem ligar para 1-800-633-7947 para obter mais informações. De acordo com a legislação de Rhode Island, estes programas são financiados pela taxa de eficiência energética cobrada nas contas de gás e eletricidade de todos os clientes.

Este programa é oferecido pela Narragansett Electric Company com o nome comercial Rhode Island Energy a clientes elegíveis no território de serviço da empresa em Rhode Island.

\*Por exemplo, um agregado familiar de quatro com um rendimento anual bruto de \$5.960 a \$17.262 é elegível para a empresa com elegibilidade baseada no rendimento. Ligue para 1-800-633-7947 para obter as condições sobre o rendimento de energia.





# Rhode Island Energy Efficiency – Equity Update

[Learn more about energy efficiency programs and rebates](#) | [Check your eligibility for energy efficiency programs and rebates](#)



**East Providence residents could qualify for 100% off approved insulation.**



**One small step can make a big difference.**

Whether you're a homeowner, renter or landlord you can enjoy lower energy costs and a more comfortable home. It all starts with a no cost Home Energy Assessment, where our Energy Specialists provide a personalized plan to show how you can take advantage of energy efficiency upgrades and year-round savings.

You may qualify for no cost upgrades, rebates, financing and more.

- Enjoy no cost air sealing
- Receive 50% or more off approved home insulation (up to \$4,000). Income-qualified homeowners may be [eligible](#)\* for 100% off approved insulation (up to \$18,000). Renters and landlords of one- to four-unit homes may qualify for 100% off approved insulation (up to \$4,000 per unit).
- Apply for a 0% interest loan for eligible energy efficiency improvements.

After you complete a Home Energy Assessment, you'll receive these energy-saving products at no cost:

		
Programmable thermostat	Water saving faucet aerators	Low flow showerheads

**If you've already had a Home Energy Assessment:**  
Consider upgrading your heating, cooling or water heating equipment and claiming generous rebates.

[Learn more](#)

**If you're a homeowner, renter or landlord who hasn't completed a Home Energy Assessment, schedule yours today.**

[Call 888-633-7947](#) | [Learn more](#)





## Energy Efficiency Equity Demonstration – Kick Off Discussion

Equity Working Group Meeting 08/31/2023



## Agenda

- Background and overview
- Funding structures
- Funding distribution
- Measurements of success
- Questions and feedback



- **Background and overview**
- Funding structures
- Funding distribution
- Measurements of success
- Questions and feedback





## Our 2024 plan includes a demonstration to engage non-profits working in our equity communities

**Challenge:** non-profit organizations are facing increasing demands to provide energy efficiency (EE) education and outreach in our equity communities with no additional funding

- + We need innovative strategies to reach multifamily renters in these communities
- + We need to better understand customers' barriers to accessing our programs

**Response:** Rhode Island Energy (The Company) will implement a demonstration to distribute \$40,000 in incentives to a handful of organizations to provide direct education and outreach to landlords in our equity communities

- + Provides stakeholders with resourcing to test outreach strategies
- + Increases our knowledgebase around barriers for renters in our equity communities
- + Creates potential leads for adoption of The Company's energy efficiency programs



- Background and overview
- **Funding structures**
- Funding distribution
- Measurements of success
- Questions and feedback



## There are a few ways we can structure the funding to drive the most impact

**Option 1:** designate funding for one or two part-time “energy advocates” to work directly with landlords and renters in our equity communities

DESCRIPTION	COMPANY ENABLEMENT
<ul style="list-style-type: none"> <li>+ Energy advocates are a dedicated resource, within a non-profit, focused on both virtual and face-to-face interactions, tabling at local events, and community presentations</li> <li>+ Serves as a “concierge” to take landlords &amp; renters from education through adoption of EE programs</li> </ul>	<ul style="list-style-type: none"> <li>+ Provide energy advocate(s) with comprehensive training in EE offerings at federal, state, and utility levels</li> <li>+ Creation of co-branded multilingual marketing materials</li> <li>+ Share best practices, program participation guide, and provide local event support</li> </ul>
EXAMPLES	PROS/CONS
<ul style="list-style-type: none"> <li>+ All In Energy – Cambridge, MA</li> <li>+ Mass Save Community First Partnership</li> </ul>	<ul style="list-style-type: none"> <li>+ <b>Pros:</b> dedicated resource(s) allows for deeper training, focused efforts, and accessible feedback</li> <li>- <b>Cons:</b> limited incentives available for producing leads, fewer organizations = less widespread outreach, less room for creativity in application process</li> </ul>



## There are a few ways we can structure the funding to drive the most impact

**Option 2:** select a handful of organizations to receive startup funding and provide additional incentives per lead generated

DESCRIPTION	COMPANY ENABLEMENT
<ul style="list-style-type: none"> <li>+ Non-profits produce their own models to engage landlord and renters based on their unique perspectives</li> <li>+ The organizations receive an incentive for each new participant in The Company’s programs</li> </ul>	<ul style="list-style-type: none"> <li>+ Provide training in EE offerings at federal, state, and utility levels</li> <li>+ Creation of co-branded multilingual marketing materials</li> <li>+ Share best practices, program participation guide, and provide local event support</li> </ul>
EXAMPLES	PROS/CONS
<ul style="list-style-type: none"> <li>+ Green Energy Consumers Alliance</li> </ul>	<ul style="list-style-type: none"> <li>+ <b>Pros:</b> encourages creativity and diversity in outreach approach, empowers non-profits to be the leaders, incentivizes generation of leads</li> <li>- <b>Cons:</b> dedicated resource not ensured, potential for disparate feedback, reduced opportunity for dedicated training, less funding for multiple organizations</li> </ul>



- Background and overview
- Funding structures
- **Funding distribution**
- Measurements of success
- Questions and feedback



## We will create an application process that selects organizations based on impact potential

### Target applicant pool

- + Applications will be open to non-profits that are either based in or operate in one of our equity communities
- + Stated preference for organizations with existing landlord relationships (e.g., Community Action Partners, Community Development Corporations), but open to all eligible 501(c)(3)
- + Stated preference for organizations with multilingual staff

### General requirements

- ✓ Commitment to demonstration through 2024
- ✓ Outreach, marketing, and communication plan
- ✓ Budget of how funds will be spent
- ✓ Support from or communication with local municipality(ies)
- ✓ If option 1 is selected, identification of energy advocate and qualifications



- Background and overview
- Funding structures
- Funding distribution
- **Measurements of success**
- Questions and feedback



## We will identify measurements of success to help us drive performance

- + The Company primarily views the success of the demonstration as dependent on hearing the voice of the customer. Some examples:

- # of landlords reached
- # of new areas of feedback
- # of customers providing feedback
- # of points of contact before participation

- + The Company also defines the success of the demonstration in the context of new energy efficiency leads generated. Some examples:

- # of new participants
- # of new participants / demo \$ spent
- Total associated customer energy savings (\$)
- Conversion rate of contacts to participants (%)





- Background and overview
- Funding structures
- Funding distribution
- Measurements of success
- **Questions and feedback**



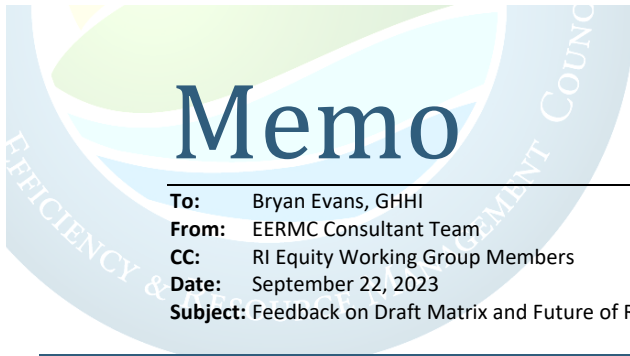
## We welcome your questions and feedback

+ Are there any general questions or feedback?

+ **Questions for discussion:**

1. Do you have a preference between the options presented today?
2. Are there other options not discussed here today that we should consider?
3. Do you have any thoughts on how to reach organizations that will drive the most impact?
  - A. Are there any specific organizations that come to mind?
4. What has worked or not worked in the past?





STATE OF RHODE ISLAND  
**ENERGY EFFICIENCY &  
RESOURCE MANAGEMENT COUNCIL**

**To:** Bryan Evans, GHHI  
**From:** EERMC Consultant Team  
**CC:** RI Equity Working Group Members  
**Date:** September 22, 2023  
**Subject:** Feedback on Draft Matrix and Future of RI EWG

CONSULTANT TEAM

The Energy Efficiency & Resource Management Council's Consultant Team (C-Team) appreciates the opportunity to provide feedback on the Draft Year 3 Matrix of Recommendations, Strategies, Metrics, and Suggested Targets document that was distributed to Rhode Island Equity Working Group (RI EWG) members on September 14, 2023. The C-Team has provided a redlined copy of the matrix that was distributed as an attachment to this memo.

In addition, the C-Team also appreciates the opportunity to share the following comments on the future direction of the RI EWG:

1. The RI EWG should transition to a continued effort, not one that starts and stops with energy efficiency program planning. This will help ensure continuous engagement with EWG stakeholders on the development, implementation, and progress of recommendations made by the group.
2. In line with a transition to an ongoing effort, the EWG should continue to meet as needed through the balance of 2023 to ensure that a consensus set of metrics and targets can be developed prior to the start of the 2024 Program year. The current proposal to develop metrics in Q1 of 2024 with a first report out in the 2024 Q2 Report is potentially problematic given that the Q2 report typically isn't delivered until early August. In our opinion, that is already getting to be too late in the year to have meaningful impact on both program delivery and planning. It also has the potential to hamper the ability of the stakeholders to have an effective discussion about what an equity component in the Performance Incentive Mechanism might look like earlier in the 2025 planning process.
3. A detailed calendar of 2024 activities for the EWG should be developed and shared, with opportunity to provide feedback, prior to the start of 2024. Critically, the calendar should aim to provide sufficient time for a first draft of the EWG report to be delivered with the first draft of the 2025 energy efficiency plan. This will ensure that stakeholders have the opportunity to review and provide feedback on the report *prior* to its finalization for inclusion with the energy efficiency plan.
4. Ensure that any contracts for facilitation services of the EWG are in place in a timely manner so that the EWG can meet its goals and to be responsive to the suggestions listed above.



Advancing the Clean Energy Future

22 Parsonage Street • Box 155  
Providence, RI 02903  
401.276.0600 • acadiacenter.org

September 22, 2023

Bryan Evans  
Green & Healthy Homes Initiative

## Feedback re: RI Energy Energy Efficiency Equity Working Group

Dear Bryan,

Thank you for your efforts to facilitate and incorporate the feedback of stakeholders into the recommendations of the Energy Efficiency Equity Working Group (“EWG”). Acadia Center is laser-focused on ensuring that all customers, and in particular, underserved communities, benefit from the energy savings, public health, and safety benefits of RI Energy (“the Company”)’s energy efficiency programs. Acadia Center has several recommendations informed by our engagement in the EWG in 2023 and subsequent review of the Company’s energy efficiency plans, which are outlined in [comments on the 2024-2026 Energy Efficiency Plan Draft Narrative](#) and [comments on the 2024 Annual Energy Efficiency Plan – Equity Targets](#). Feedback on the specific Year 3 recommendations of the EWG has also been provided within the EWG Matrix spreadsheet.

With the Company guiding the direction and outcomes of the EWG, we do have concerns regarding the accountability of the group. Acadia Center invites the Company to provide more formal reports back to the Energy Efficiency Resource Management Council (EERMC) regarding the outcomes of the EWG, on a quarterly basis. The fact that, three years in, the Company has not developed equity metrics for feedback by the EWG is unacceptable. Iterating equity metrics, annual targets and a reporting template should be the substantive work of the EWG. In Q1 and Q2 of 2023, the Company’s quarterly equity reports did not meaningfully incorporate the recommendations of the EWG; for example, the specific metrics offered in the EWG’s 2022 annual report would have significantly improved the data quality currently offered by the Company.

The meetings of the EWG should facilitate a more comprehensive understanding of current activities, targets, and distribution of investments for energy efficiency programs, and should enable stakeholders to provide feedback, request additional information, and meaningfully inform the Company’s planning processes. In 2024, the Company has offered to provide at least 6 EWG meetings. Acadia Center would like these to start in January, and for the Company to work collaboratively with the EWG to map the topic areas and outcomes for meetings throughout the year. Materials and agendas should be shared with stakeholders in advance. We would like to see the active engagement of Company staff knowledgeable on the status of equity commitments; ideally the same Company staff would engage in the EWG throughout the coming year. We have also seen participation wane and would like to see an effort to broaden participation in the EWG; to date, no participant has taken advantage of compensation.

Acadia Center offers the following guidelines for developing a wide range of specific, measurable equity metrics and targets for key energy efficiency measures and outreach and engagement. A more detailed contrast between metrics

provided in the Company's recent quarterly reports, and those proposed by Acadia Center was provided in a [lecture on energy efficiency participation](#) offered and recorded on September 19, 2023.

- Establish meaningful geographic areas
- Set annual targets, based on past performance, non-participant study and other sources
- Establish template for quarterly metric reporting, with feedback from EWG
  - Includes % achievement towards annual target
- Assessment and weatherization #s placed in the context of meaningful geographic area, size of universe, and conversion rate
- Outcome-oriented
  - For example, instead of events attended or emails sent/clicked, what was the impact of that outreach? As in, how many home energy audit participants learned about the program at an event or from an email? Is the Company connecting the dots between outreach and uptake?
- Allocate annual funds to community-based organizations

I look forward to continuing to engage in the Equity Working Group in 2024.

Sincerely,

Emily Koo  
Senior Policy Advocate & Rhode Island Program Director  
[ekoo@acadiacenter.org](mailto:ekoo@acadiacenter.org)



## Energy Efficiency Working Group – Year 3 Matrix

Equity Working Group Meeting 09/29/2023



## The Company conducted an initial review of the EWG Year 3 Matrix

- + Thank you to all stakeholders who provided feedback and recommendations
- + We will provide initial reactions today on the year 3 recommendations (column B on each tab in matrix) and will continue to iterate over the coming months
  - We would like to hear the EWG's priorities for these recommendations
- + Bucketed initial feedback into four categories
  - Already doing
  - Feasible to do, needs more research
  - Currently unable to do
  - Clarification needed (the company has a clarifying question)





## Equity Issue / Challenge: Participation Barriers

- 1) Increase participation rates from residents living in the 5 Equity Communities (or Justice40 or EJ Communities) across the EnergyWise and IES Programs by XX% by the end of 2024
  - **Feasible to do, needs more investment to automate:** we would need to establish a baseline first to track this
  
- 2) Track the # of HEAs in other languages
  - **Feasible to do, needs more research:** need to understand how we could track given our current processes
  
- 3) Offer Home Energy Assessments (HEAs) in at least 4 languages other than English (e.g. Spanish, Portuguese, Chinese (Cantonese/Mandarin), Creole) by the end of 2024
  - **Clarification needed:** looking for more specifics here
  - Language translation lines currently being used



## Equity Issue / Challenge: Multifamily Barriers

- 1) Increase participation rates in EnergyWise Multifamily and Income Eligible Multifamily Programs statewide by XX% over 12 months - We can show this: would need to pull out historical participation data // we have served a lot - something that may not be visible
  - **Feasible to do, needs more research**
  
- 2) Increased focus on renter-specific resources, including but not limited to information on what is available for renters and renter-friendly DIY home improvements that can cut down on energy use
  - **Feasible to do, needs more research:** we do not currently collect this level of information on renters, but we will look into this

## Equity Issue / Challenge: Pre-weatherization Barriers



- 1) Close the gap in the Conversion to Weatherization ratio between Energywise and IES programs by XX% over the next XX months.
  - **Currently unable to do:** this is not realistic as IES has far more expensive pre-weatherization barriers. Some future work would be to improve data collection on IES side.
  
- 2) Provide additional funding for pre-weatherization barrier remediation.
  - **Already doing:** We are conducting tests with IE heat pump work. Coordinating with OER on additional IRA funding.
  
- 3) Engage with the new State Department of Housing, cities/towns code officers, and/or housing courts. Better coordination between agencies can potentially address the pre-Wx issue.
  - **Feasible to do, needs more research:** Would need to improve data collection on IES side.



## Equity Issue / Challenge: Workforce Development

- 1) Increase the % of BIPOC workforce training participants and contractors that reside in the 5 Equity Communities (or Justice 40/EJ Communities) year over year by XX%
  - **Feasible to do, needs more research:** need to establish target and feasibility of any additional tracking to be done
  
- 2) Increase # of and capacity of minority contractors by XX% in 2024.
  - **Clarification needed:** is this referring to RIE contractors, or more broadly in the industry? How might we measure capacity?
  
- 3) Increase the # and size of contracts awarded to MWBEs by XX% in 2024.
  - **Clarification needed:** is this referring to RIE, or more broadly in the industry?
  - **Already doing:** Report the number of MWBE contractors. Need to research the # and size elements.

## Equity Issue / Challenge: Metrics Tracking/Reporting



- 1) Based on RI EWG member feedback, Rhode Island Energy continues to miss the mark on sharing meaningful metrics and progress. For example, the metrics from Year 2 for Workforce Development & Training were not reported on by the utility, but instead very brief updates on their quarterly equity update reports. In addition, the lack of a sufficient baseline of data hinders working group members ability to better inform recommendations, actions, metrics, and targets. In order to better share progress over time and identify issues and solutions, members agreed that the Company must develop a more comprehensive template to better report on equity and targets in quarterly and annual reports.
  - **Feasible to do, needs more research:** We have committed in our plan to establishing a set of trackable equity metrics by the end of Q1 2024 to begin tracking in Q2. We will begin the conversations in Q4 2023.



## Equity Issue / Challenge: Micro & Small Business

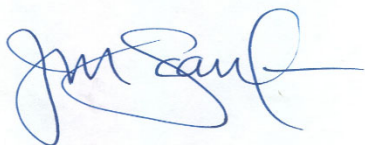
- 1) Leverage findings from the 2023 Small Business Process Evaluation to improve program strategy
  - **Feasible to do**
  
- 2) Conduct Main Street efforts in all five communities identified in the 2024-2026 EE Plan Narrative
  - **Feasible to do:** In 2024 we committed to conducting MAIN STREET campaigns in 3 of the 5 communities, including conducting two campaigns in each of the largest towns (e.g. Providence, Pawtucket).
  
- 3) Develop translated program materials, as suggested in the SBDI Process Evaluation
  - **Feasible to do:** Working with Creative Services/Marketing on website PDF versions in Portuguese and Spanish



Certificate of Service

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

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



\_\_\_\_\_  
Joanne M. Scanlon

October 6, 2023

Date

**Docket No. 23-35-EE – Rhode Island Energy’s EE Plan 2024-2026 Three-Year Plan and 2024 Annual EEP  
Service list updated 10/4/2023**

<b>Name /Address</b>	<b>E-mail Distribution List</b>	<b>Phone</b>
<b>The Narragansett Electric Company d/b/a Rhode Island Energy</b> Andrew Marcaccio, Esq. 280 Melrose St. Providence, RI 02907  Leticia C. Pimentel, Esq. Steve Boyajian, Esq. <b>Robinson &amp; Cole LLP</b> One Financial Plaza, 14th Floor Providence, RI 02903	<a href="mailto:amarcaccio@pplweb.com">amarcaccio@pplweb.com</a> ;	401-784-4263
	<a href="mailto:cobrien@pplweb.com">cobrien@pplweb.com</a> ;	
	<a href="mailto:jhutchinson@pplweb.com">jhutchinson@pplweb.com</a> ;	
	<a href="mailto:jscanlon@pplweb.com">jscanlon@pplweb.com</a> ;	
	<a href="mailto:dmmoreira@rienergy.com">dmmoreira@rienergy.com</a> ;	
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	<a href="mailto:SBriggs@pplweb.com">SBriggs@pplweb.com</a> ;	
	<a href="mailto:BJPelletier@rienergy.com">BJPelletier@rienergy.com</a> ;	
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