

# MEMO

## CONSULTANT TEAM



**TO:** Energy Efficiency Council  
**FROM:** EEC Consultant Team  
**CC:** Office of Energy Resources  
**DATE:** April 18, 2024  
**RE:** Consultant Team Update on Equity Working Group 2024 Process and Outcomes to Date

### INTRODUCTION

The Energy Efficiency Council (EEC or “the Council”) has shown strong interest in equity matters, equity metrics, and Rhode Island Energy’s (the Company’s) Equity Working Group (EWG) in general. In association with prior updates in November and December from the Company and its EWG facilitator—Green & Healthy Homes Initiative (GHHI)—Council members expressed strong support for the work of the EWG and interest in equity metrics/data sharing and continuing with forward momentum. This memorandum includes updates from the Consultant Team’s (C-Team) perspectives as well as observations regarding the Company’s work to establish equity-related programmatic priorities and metrics for 2024 in consultation with the EWG.

### UPDATES AND OBSERVATIONS

**The last meeting of the Equity Working Group (EWG) in 2023 was on September 29**, at which time it reviewed and discussed its final report for 2023 (prepared by GHHI) and a matrix of suggested recommendations, strategies, metrics, and targets. The EWG did not meet—nor was it otherwise engaged—to discuss the Company’s work on developing a methodology to select metrics and scoring of the EWG’s recommended metrics on the basis of tracking feasibility as presented to the Council in November and December.

***C-Team Observation:** The EWG should have been engaged in this work in the final quarter of last year, which may have allowed an earlier rollout of efforts to track and report equity metrics in 2024.*

**In January**, representatives of the C-Team met with Company and GHHI leads to discuss plans for working with the EWG in 2024, including on equity metrics. Our team shared that we felt that it was more important to use equity priorities than tracking feasibility for prioritizing equity metrics to track in 2024. The Company indicated it was willing to work with the EWG to determine priorities and metrics.

**The EWG’s first meeting in 2024 was on January 30.** The bulk of the meeting was spent on a presentation of progress by the Company in addressing the EWG’s 2023 recommendations. The Company, GHHI, and the C-Team subsequently agreed that the agenda as executed did not provide sufficient opportunity for active participation by the EWG members.

**In February**, Emily Koo representing Acadia Center as an EWG member, joined the C-Team, Company and GHHI in debriefing the January meeting and discussing the February agenda. There was agreement that discussions should be more inclusive of contributions from the EWG and that there needed to be more focus on EWG priorities and associated equity metrics. The group also agreed that establishing a

regular planning meeting in advance of the full EWG meeting would be valuable. In addition to this core group, there was discussion of including other EWG members.

***C-Team Observation:** Establishment of a regular pre-EWG planning meeting should be a valuable addition to the EWG process. It's not clear it has been formally included in meeting preparations yet, and to our knowledge other EWG members have yet to be engaged.*

**The EWG's second meeting in 2024 was on February 27** and included a presentation by Emily Koo suggesting an approach to development of equity metrics as well as facilitated breakouts to discuss priorities and metrics. This input was used by the Company to develop a set of 2024 energy efficiency strategies and metrics, which were provided to the EWG on March 22 and discussed at the **third EWG meeting on March 27**. EWG members provided feedback on the metrics and the Company was responsive in indicating why that input would or would not be addressed at this point. It plans to begin reporting of the metrics in the Q3 report.

***C-Team Observation:** Given their expertise, we would like to see more active engagement by a greater number and variety of EWG members in each aspect of its work, including equity metrics. This might require more proactive engagement and use of different facilitation techniques, such as a mechanism to seek input from each member.*

***C-Team Observation:** Although we are disappointed with the delay in finalizing the metrics—which means the first metrics data will not be reported until after the 2025 Plan is filed--the list of 2024 equity metrics seems to us to be a reasonable start, and we appreciate the Company's forthcomingness in sharing tracking challenging and its willingness to make additions and changes suggested by EWG members. We would like to emphasize that 2024 is just the start.*

***C-Team Observation:** 2025 is not that far away, and we suggest that the Company and GHHI prepare a schedule in coming months to support EWG engagement this fall in development of equity metrics for 2025 so tracking and reporting systems can be in place at the beginning of the year.*

**Plans for the remainder of 2024:** Last year, the EWG's ability to contribute to 3-year and 2024 Annual planning was compromised by issues related to contracting between the Company and GHHI. We were pleased to hear that the contract eventually executed will cover all of 2024, which should provide continuity to the EWG's work. With work on equity metrics complete, a key focus will be development of equity recommendations for the 2025 Annual Plan.

***C-Team Observation:** A proactive planning and scheduling approach to procurement for EWG facilitation will be required to ensure the group's work is not interrupted.*

***C-Team Observation:** It will be important that the EWG's schedule sync with the planning calendar so that the EWG's recommendations can be considered and addressed by the Company in its plan development process.*