



Rhode Island Energy Efficiency

First Quarter 2024 | Rhode Island Energy

May 15, 2024

Overview

Rhode Island Energy's energy-efficiency programs continued to deliver energy savings for Rhode Island customers through the first quarter of 2024 by achieving 59,012 net lifetime MWh of electric savings (8.1% of the net lifetime goal) and 259,113 net lifetime MMBtu of natural gas savings (7.9% of the net lifetime goal).

- **Residential New Construction (RNC):** Habitat for Humanity Rhode Island, South County, Inc., is constructing seven single-family homes for households with incomes at or below 80% Area Median Income (AMI). These homes will be equipped with individual solar PV arrays and air source heat pumps. This project is participating in Rhode Island Energy's RNC program and is currently under construction. The first three units were inspected in Q1, and the first residents moved in after the grand opening in January.
- **Income Eligible Services (IES):** The IES program is transitioning the appliance replacement offering and process to local, Rhode Island-based vendors. The goal of this transition is to ensure that eligible customers are served in a timeframe reflective of the appliance market, and that invoicing is complete, timely, and accurate. Rhode Island Energy expects that this transition will result in happier customers and an increase in productivity in this area.
- **Large Commercial Retrofit:** Rhode Island Energy worked with a jewelry manufacturer to implement a Building Analytics Program ("BAP") project at their facility. This program helps lower operating costs and improves occupant comfort by leveraging the data available through Building Automation System ("BAS"). It provides continuous analysis on the building's operations for actionable insights and facilitates the implementation of low-/no-cost energy efficiency measures.
- **Small Business Direct Install:** The program's Lead Vendor recently added two summer, temporary positions for canvassing and marketing outreach, with one new hire being bilingual. These canvassers will be primarily focused on Main Street outreach, with the first Main Street campaign having begun on May 13 in Providence and continuing for two weeks.

2024 Program & Initiative Updates – Q1

Residential New Construction (RNC)

The Residential New Construction (RNC) program achieved 591 net lifetime MWh of electric savings (3.7% of the lifetime goal) and 8,706 net lifetime MMBtu of gas savings (11.9% of the lifetime goal) through the first quarter of 2024.

Q1 RNC Program Enrollments and Completed Units

- 132 housing units were built to RNC Program standards in Q1
 - 131 units were new construction/full gut rehab (99.2%)
 - 1 was renovation/rehab (0.8%)
 - 124 units were market rate (94%)
 - 8 units were Income Eligible (6%)
 - 6 units had electric heat pumps (4%)
 - 118* units had gas heat (89%)
 - 10 units had either propane or hybrid heat pumps with propane (7%)
- 148 newly planned housing units enrolled in the RNC Program

*It should be noted that 104 of the 118 gas heated units reported (88%) are all one project consisting of two 52-unit buildings in East Providence.

Q1 RNC Program Trends, Challenges & Solutions

Construction has continued to recover from the after-effects of Covid, which caused labor and material shortages and delays in permitting and funding for several years, resulting in prolonged timelines for project starts and completions.

There are significant signs of improvement in Q1:

- Q1 completed units increased from 2023
 - 2023 (Jan-Mar) - 28
 - 2024 (Jan-Mar) - 132
- The pipeline of projects is growing
 - From 2022 to 2024 the RNC Program Vendor enrolled a significant number of new projects in early planning and design phase into the program, including 873 in 2022, 798 in 2023 and 148 so far in 2024

- The increased pipeline of projects receiving support from RNC will result in an increase in completed units in 2024 and 2025 compared to 2022 and 2023
- Many enrolled projects are multifamily affordable housing
- The pipeline of high-performance homes is growing
 - Over 350 units are seeking DOE Zero Energy Homes or Passive House certification

Q1 RNC Program Event Highlights

Rhode Island PHIUS Chapter Training & Networking Events

- In 2023 the RNC Program Vendor partnered with local builders and designers to establish a local Passive House chapter
 - <https://passivehouseri.org/>
- The chapter's mission is to promote the Passive House Building Energy Standard in Rhode Island through public outreach, education, advocacy, and training
- Current members include architects, builders, consultants, designers, and the general public
- In March the RNC Program Vendor teamed up with RNC Program participant Steve DeMetrick of DeMetrick Housewrights, who built the first certified Passive House in Rhode Island, to deliver a presentation on Air Sealing and the New Code at Union Studio Architects in Providence (pictured bellow)



South County Habitat for Humanity Zero Energy Homes - Grand Opening

- The RNC Vendor presented at the Grand Opening of the first three zero energy homes on Cardinal Lane in Hopkinton
- This project is participating in the RNC program, and is receiving additional funding through ZEOS
- <https://weare.rienergy.com/building-dreams-sustaining-futures-south-county-habitat-for-humanitys-net-zero-ready-homes/>



Zero Energy Homes Pipeline

- The RNC Program Vendor continued to provide technical support for Zero Energy homes across the state, including 114 seeking Passive House certification and 240 seeking DOE Zero Energy Ready certification
- The number of Zero Energy Homes in the pipeline has increased by 100% since 2022
- Most homes in the pipeline are Income Eligible

Zero Energy for the Ocean State (ZEOS) Support

- Rhode Island Energy teamed up with the Rhode Island Office of Energy Resources (OER) and RIHousing to provide funding and technical support for four affordable, energy-efficient residential projects in Providence, Hopkinton, and Tiverton through ZEOS
- The ZEOS Demonstration Program is focused on the construction of cost-effective, environmentally friendly, net-zero homes, and is a collaboration between the three organizations with the goal of increasing the supply of affordable housing while also reducing carbon emissions
- The four projects receiving funding from the third round of ZEOS are:
 - Parcel 9 (Providence): Pennrose, LLC is constructing a 66-unit new construction apartment building, a mix of studios and one- and two-bedroom apartments. All units will be made available to those making between 30% to 120% of the Area Median Income (AMI). The building will be equipped with a net metered rooftop solar system, along with air source heat pumps and energy recovery ventilators (ERVs). This project is participating in the RNC program.
 - Summer Street (Providence): Crossroads Rhode Island is developing 176 one-bedroom units, all of which will be for those with incomes at or below 30% of the AMI. Crossroads will install a rooftop net metered solar

system, along with air source heat pumps and ERVs. This project is participating in Rhode Island Energy's C&I Zero Energy program.

- Sandywoods (Tiverton): Church Community Housing Corporation has completed two net-zero houses to date through ZEOS, with three additional net-zero homes currently under construction. The funds received in this third round of ZEOS will add two more single family net-zero houses. The homes will be made available to households with incomes at or below 80% AMI. A solar system, ERVS, and air source heat pumps will be installed to achieve the energy requirements. This project is participating in the RNC program.

Cardinal Lane (Hopkinton): Habitat for Humanity Rhode Island, South County, Inc., is constructing seven single-family homes for households with incomes at or below 80% AMI. The homes will have individual solar PV arrays and air source heat pumps. This project is participating in the RNC Program and is currently under construction. The first three units were inspected in Q1, and the first residents moved in after the Grand Opening in January.

Q1 RNC Program Builder Testimonial

- *“Good afternoon, Rachel. I just had an incredible experience with Jonathan Harrison. He appreciated my need for guidance and expressed his expertise in a patient and professional manner. It was a wonderful experience, and when building new homes it gives me much more confidence in energy efficiency. Thank you.” - Kenneth T.*

Income Eligible Services (IES)

The Rhode Island Energy Income Eligible Services program achieved 2,865 net lifetime MWh of electric savings (7.8% of the lifetime goal) and 14,300 net lifetime MMBtu of gas savings (11.8% of the lifetime goal) through the first quarter of 2024.

Challenges and Responses

In Q1, the Company focused on two major efforts:

1. Transitioning the appliance replacement process to a Rhode Island focused program. All vendors will be local. The goal is to ensure that eligible customers are served in a timeframe reflective of the appliance market, and that invoicing is complete, timely, and accurate. Accomplishing these goals will result in happier customers, and an increase in productivity in this area.
2. The transition to the Comprehensive Assessment started on January 1, 2024. The IES Lead Vendor has provided training to upskill AMP auditors (the baseload electric assessment) to the Comprehensive Assessment. Most RI IES Energy

Specialists began their careers as AMP auditors. Their transition to the Comprehensive Assessment consisted of learning the new process and dusting off old skills. Some AMP Auditors have chosen to leave the program, either to work in other facets of the CAP agency or for retirement.

In Q1, the Rhode Island Community Action Programs (CAPs) overperformed on heating system replacements. The funding provided by the Rhode Island Department of Human Services (DHS) for heating system repair and replacement has been met or exceeded by 5 agencies. In 2024, at the conclusion of the Emergency Heating period (April 30), Rhode Island Energy is promoting that oil/propane heating systems that are identified as near end-of-life be replaced with efficient electric heat pump systems. The Company works with supporting stakeholders (RI OER, DHS, DOE, and others) to identify funding and opportunities that can be leveraged to replace oil/propane heating systems with high efficiency heat pumps.

The RI IES Lead Vendor is working with Abode, the contractor implementing the Clean Heat RI program for OER. Abode had concerns about verifying eligibility of IES customers and information on weatherization at potential customers homes. Working with the customers, the RI IES Lead Vendor provides data to the customer who then forwards that verification to Abode. OER has recently signed an MOU with DHS to attain direct access to the DHS weatherization information in the Hancock system. This will reduce the administrative burden.

The Inter-Agency Referral program was established to assist CAPs that do not have staffing capacity to meet their goals. CAPs that can assist in the other areas receive referral services to serve customers in an under-resourced service area. The inter-agency referral program was expected to increase budget utilization, enable the CAP agencies to reach more customers, achieve greater energy savings, improve the health and wellness of many income-eligible households, and create a more equitable program. In 2023, the CAP of Providence service territory defined by zip code 02905 was assigned to Comprehensive CAP. Comprehensive CAP continues to serve customers in that area. In Q1, the RI IES program began working with RISE to augment opportunities in 4 of the 5 Equity Zones: Providence, Pawtucket, Central Falls and Woonsocket. The East Providence Equity Zone is served by East Bay CAP. 40% of East Bay CAP IES funding was spent in East Providence in 2023.

In 2023, RI Department of Human Service completed a third-party comprehensive audit of all Energy Specialists participating in the WAP/IES program (commissioned by the US Department of Energy). DHS used this opportunity to identify training needs based on outcomes. Many of the identified issues were with heating systems (CAZ & gas leak testing). In Q1 DHS sent every Energy Specialists to CHP (Community Housing Partners)

training in their Baltimore training facility. The week-long training concluded with both a written and practical exam. Feedback on the training was very positive. The RI IES Lead Vendor also sent their QA/QC staff person to the training.

The KPI process continued in the first quarter with the goal of improving communications and forecasting between the CAPs and the Company's Lead Vendor. Invitations to attend these monthly meetings are sent to each CAPs Weatherization Director, Julie Capobianco of DHS, and members of the RI IES EE team. These meetings ensure that the CAPs are aware of their KPI goals, their pace to meet the goals, and provide a dedicated time for constructive dialog.

The Q1 Best Practice meeting was a Teams meeting. Invitees included the PUC, the Division, DHS, OER, the EERMC, and the CAP agencies. Topics covered included Introductions, Marketing, DOE WAP & Training Update, Clean Heat RI, Pre-Weatherization Barriers, 2023 review, new appliance process, and finally a Q&A and open discussion.

Customer Highlight

Discussing her new ASHP installation:

“Very happy with the whole program! Installer answered all my questions and were very professional.”

Tammi from Central Falls

EnergyWise Single Family

The EnergyWise Single Family program achieved 2,592 net lifetime MWh of electric savings (17.3% of the lifetime goal) and 140,084 net lifetime MMBtu of gas savings (22.8% of the lifetime goal) through the first quarter of 2024.

The EnergyWise program Lead Vendor conducted 3,365 home energy assessments and managed the completion of 1,404 weatherization projects in the first quarter.

Activities of interest include:

- Four Energy Specialists completed training and began conducting assessments.
- Team Lead was filled by Charles Leach. This role will help to further develop new Energy Specialists and improve the accuracy of the whole team.
- Energy Specialists completed twenty assessments in Spanish.

- The Lead Vendor conducted two Heat Pump Concierge visits with customers creating load calculations, devising a plan, and issuing quotes.
- Lead Vendor presented an information session on the EnergyWise Program at the OER's Climate Justice Hour.

Challenges and Responses

Demand for Home Energy Assessments continues to lag historic program averages in the first quarter. The Company implemented a robust marketing campaign to drive customer demand including postcard mailers, targeted e-mails, radio and print ads, bill inserts, online banner ads, native articles, social media ads and Google paid search discovery ads.

The Program continues to offer enhanced incentives including an increased standard incentive from 50% to 75% and a 100% incentive for electrically heated homes.

Customer Highlights

Customer feedback themes from the HEA included:

- Many customers commented on the professionalism and technical knowledge exhibited by the auditor who conducted their HEA and the responsiveness of the scheduling staff.

Customer feedback themes from weatherization contractors included:

- Many customers had strong praise for their contractors and Rise Engineering as well as the Energy Wise program as a whole.
- Several customers stated that they noticed the improved comfort in their homes after the completion of their weatherization project.

Customer Satisfaction Survey Results

Home Energy Assessment Survey for Q1 (n=497)

- Average customer overall satisfaction rating = 8.84 out of 10
- Percent of respondents that would recommend the program = 94.97%

Weatherization Survey for Q1 (n=263)

- Average Customer overall satisfaction rating = 9.27 out of 10
- Percent of respondents that would recommend their contractor=95.44%

EnergyWise Multifamily, Income Eligible Multifamily, C&I Multifamily

The EnergyWise Multifamily program achieved 25 net lifetime MWh of electric savings (0.3% of the lifetime goal) and 20,536 net lifetime MMBtu of gas savings (19.7% of the lifetime goal) through the first quarter of 2024. The Income Eligible Multifamily program achieved 0 net lifetime MWh of electric savings (0.0% of the lifetime goal) and 0 net lifetime MMBtu of gas savings (0.0% of lifetime goal) through the first quarter of 2024. The C&I Multifamily program achieved 18,924 net lifetime MMBtu of gas savings (28.8% of the lifetime goal) through the first quarter of 2024.

Customer Highlights

Mansion House Apartments– Cranston:

Commercial 135-unit, multi-family gas heating and DHW boiler retrofit project. Furnished and installed two Lochinvar high efficiency gas fired boilers with outdoor reset controls, and condensate neutralizer systems and two new 119-gallon DHW storage tanks as well new control pumps. The commercial gas incentive for this project was \$116K with an estimated savings of 138,600 net lifetime therms.

Hill View Condominiums-North Providence:

Standard income Gas weatherization project. Combustion safety tests were completed at participation units in order to install attic air sealing, insulation, weatherstripping and insulating attic hatches, and overhang insulation. The standard gas program incentive for this work was \$20K and has an estimated net lifetime savings of 21,765 therms.

Challenges and Responses

Audit staff noted at least one weatherization project has not moved forward because the potential customer noted lack of available financial resources to pay for needed site improvements. The Company is exploring the idea of offering a 100% incentive weatherization incentive for projects that are fully renter occupied.

Workforce Development

Lead Vendor staff attended an AEE/ASHRAE technical session on decarbonization.

The Lead Vendor's Electro-mechanical team members attended an AHRI conference.

ENERGYSTAR® HVAC (Heating and Cooling)

The ENERGYSTAR® HVAC (Heating and Cooling) program achieved 3,159 net lifetime MWh of electric savings (2.8% of the lifetime annual goal) and 18,890 net lifetime MMBtu of gas savings (8.6% of the lifetime goal) through the first quarter of 2024.

Q1 HVAC Contractor Trainings

A total of 11 trainings and events were held during the first quarter

- The HVAC Program offers several types of live virtual and on-site HVAC Check testing trainings and training modules
 - AC Check
 - MS Check (specifically for mini splits)
 - HVAC Check (which includes both MS Check and AC Check)
 - During Q1 the HVAC Program delivered 6 MS Check trainings
- The HVAC Program offers right sizing and equipment selection training
 - Manual D – Duct Design
 - Manual J – Load Calculations
 - Manual S - Equipment Selection
 - During Q1 the HVAC Program delivered 2 Manual J trainings and 1 Manual S training
- The HVAC Program offers Introduction to Heat Pump presentations
 - These are intended for a broad audience, including builders, contractors, homeowners, architects and building inspectors
 - They are aimed at raising general awareness of heat pump technology, understanding the importance of sizing, duct design and proper installation, and sharing best practices for operation
 - During Q1 the HVAC Program delivered an Introduction to Heat Pump presentation at Viessmann Manufacturing in Warwick and for the Rhode Island Builders Association in partnership with Rhode Island Energy’s Codes & Standards Technical Support Program
- The HVAC Program attends contractor events across Rhode Island to share information about rebates, HVAC Check testing and available trainings.
 - In Q1 The HVAC Program Vendor attended
 - Homans Associates training with Mitsubishi in North Kingston, with 45 attendees from 14 different companies
- The HVAC Program provides training for Tech Schools
 - In Q1 the HVAC Program Vendor provided 2 trainings for Apprentices at MTTI Tech

Q1 HVAC Check Testing

The Program Vendor actively reaches out to HVAC contractors to encourage them to perform HVAC Check testing on both new systems and existing systems during preventative maintenance visits to ensure proper operation.

- HVAC Check testing can only be performed in warmer weather months
- Several warm winter days in Q1 enabled contractors to perform 61 tests

Q1 Weekly HVAC Contractor Newsletter

The HVAC Program Vendor prepares and distributes a weekly HVAC Program newsletter for 650+ HVAC companies, contractors, technicians, distributors, trade allies and other industry stakeholders

- Q1 topics included
 - Links to the new 2024 Program Rebate Forms
 - 2023 year-end rebate submission reminders
 - Links to upcoming HVAC Check trainings
 - Links to updated HVAC Check Test Forms
 - Winners of the 2023 HVAC Check Testing Competition
 - Industry best practices
 - Links to Clean Heat RI
 - Links to Federal Tax Credits
 - Promotion of the spring RI Home Show
 - Availability of program support in Spanish



Q1 HVAC Program Highlights

Supply House Visits

The HVAC Program Vendor continued to visit Supply Houses across Rhode Island, sharing updates on equipment rebates, available trainings, and best practices.

- The team visited supply houses in Providence, Warwick, Cranston, Middletown, and Smithfield in Q1
- Program materials such as application forms and overviews of rebates and tax credits were left on countertops for visiting contractors

MTTI Tech Training

The HVAC Vendor provided training for technicians at MTTI Tech during Q1.

- MTTI Career Trade School Training <https://mtti.edu/programs/hvacr-technician/>
 - The HVAC Vendor provided two sessions of evening trainings for 16 MTTI technicians to satisfy their apprenticeship requirements
 - The first session addressed AC Check and Manual D, the second session addressed MS Check and Manual J
 - This was delivered in partnership with Program Participating Contractor Lawrence Air Systems Inc.
- Contractor testimonial:
 - ***“Thank you so much for sharing this training with our class. You have spurred some really good discussions and inspired another group of technicians.”*** – Jason L.

HVAC Check Test Competition

The winners of the HVAC Check Competition were announced in Q1. This competition highlights and rewards contractors who performed the most passing tests during the year. Winners received recognition in a special edition of the weekly HVAC newsletter, and an opportunity to claim a tool reimbursement.

- Most Active in Rhode Island - D&V Mechanical Inc, Westerly
- Most Active in Providence County - Regan Heating & Air Conditioning, Providence
- Most Active in Newport County - Ocean State Air Solutions Inc, Portsmouth
- Most Active in Washington County - Valley Heating & Cooling, Inc, Richmond
- Most Active in Kent County - Control Systems, Cranston
- Most Active in Bristol County - William Harris HVACR Solutions, Barrington
- Most Active MA or CT Based Company - Lawrence Air Systems, Seekonk, MA



Contractor testimonial:

- ***“Thank you! Wow! All this just for doing the right thing and for doing my job! I love it! I’ll put the tool reimbursement to good use. As of a few months ago we are doing strictly mini split service, maintenance, and installations and the MS Check tests will be part of my DAILY routine.”*** Frank D, HVAC Check Test Competition Winner

Clean Heat RI Collaboration

The RI HVAC Program continued to support Clean Heat RI in Q1:

- Clean Heat RI, launched in September 2023 by the Office of Energy Resources, offers additional incentives for new construction and customers displacing fossil fuel heat with high efficiency heat pumps
- As customers are eligible to apply for rebates from both Rhode Island Energy and Clean Heat RI, the HVAC Program is actively encouraging contractors and customers to apply for both through weekly newsletters and updates made to the website and rebate portal, which all include links to Clean Heat RI
- RI HVAC and Clean Heat RI worked together to continue to align equipment efficiency requirements through 2024

Q1 High Efficiency Gas Program Support

The HVAC Program Vendor continued to promote Rhode Island Energy's high efficiency gas equipment rebates to distributors, factory representatives and contractors through the weekly newsletter.

In February, RI Energy promoted available rebates and zero % financing for high efficiency natural gas equipment through an email campaign to customers.

Q1 HVAC Program Updates, Challenges and Solutions

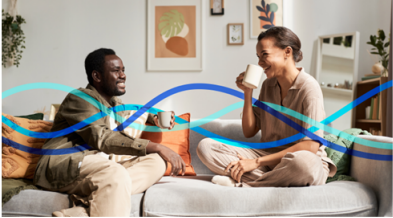
DOE SEER2 and HSPF2 standards are now available for heat pumps:

- DOE released new standards for rating the efficiency of heat pumps
- Existing systems need to be tested and re-rated but can continue to be sold under previous standards through 2024
- There is a mix of SEER/HSPF and SEER2/HSPF2 rated equipment in the marketplace, with different AHRI numbers, which has created challenges for verifying rebate eligibility
- To ease the transition to the new standards the HVAC Program is continuing to accept both ratings through 2024

ENERGY STAR 6.1 Cold Climate certification standards are now available for heat pumps:

Rhode Island Energy
a PPL company

Let's make more comfortable homes more affordable.



Get up to a \$1,000 rebate on new high-efficiency heating equipment.

Ready to save up to 30% on your heating bills, month after month? We're helping Rhode Island Energy customers do just that, with big rebates and zero interest financing when replacing outdated gas heating systems.

[Learn more](#)




Today's heating systems achieve efficiencies up to 98.5%, which means they can convert nearly all fuel into heat. Older systems can be as low as 56%.

- Qualifying systems must be rated under the new DOE guidelines (SEER2/HSPF2) and some types of systems have a higher minimum efficiency level than currently required by the HVAC Program
- Demand for ENERGY STAR 6.1 systems will increase within the region, which will likely put pressure on supply, and create challenges with meeting customer demand and RI HVAC Program goals
- To avoid disruption in the supply of rebate-eligible equipment for Rhode Island customers, in 2024 the HVAC Program included ENERGY STAR 6.1 as an additional rebate option, but not as the only requirement

Multiple rebate offerings and tax credits are good news for Rhode Islanders but can create confusion:

- To provide clarity the HVAC Program developed a one-page flyer displaying all available options with links and QR codes to each offering
 - This resource has been well received by contractors and customers
 - Customer testimonial:
 - ***“This is a belated note to thank you for your visit here in Exeter on the 8th. The information you gave me was/is incredibly helpful. The sheet you left me, summarizing rebates and tax credits, was the first time I’d seen a coherent, understandable presentation of the various programs available, with their constraints described. So, thanks again; I appreciate you each making the long journey here, and all that I learned from you.”***
- Don H.

2024 Rhode Island Heat Pump Rebates

	RI Energy Enhanced Rebate (Utility Sponsored Program)	RI Energy Standard Rebate (Utility Sponsored Program)	Clean Heat RI Rebate (State Sponsored Program)
Contact Info	General Information: 844-615-8315 Rebate Status: 800-292-2032	General Information: 844-615-8315 Rebate Status: 800-292-2032	General Information: 401-341-6183
Website	 rienergy.com/riheatpump	 rienergy.com/riheatpump	 cleanheatri.com
Primary Heating Type	Electric baseboard resistance heating	Natural gas, oil, or propane	Natural gas, oil, or propane
Installer Requirements	Installer must be a RI Energy Participating Contractor: www.rienergy.com/media/ri-energy/pdfs/energy-efficiency/rhode-island-electric-contractors.pdf	Any Rhode Island refrigeration licensed contractor can install rebate-eligible equipment	Contractor must be part of the Clean Heat RI Heat Pump Installer Network: www.cleanheatri.com/resources/find-an-installer
Efficiency Requirements	ASHP must meet minimum efficiency requirements shown in the Enhanced Rebates section: rienergy.com/riheatpump	ASHP must meet minimum efficiency requirements shown in the Standard Rebates section: rienergy.com/riheatpump	ASHP must meet minimum efficiency requirements: www.cleanheatri.com/resources/incentives
Additional Requirements	Home must be insulated & weatherized, as verified through the Energy Wise Program: www.rienergy.com/RI-Home/Energy-Saving-Programs/Home-Energy-Assessments	None	None
Incentive	\$1,250 per ton	\$150/350 per ton	\$1,000 per ton
Additional Incentives customers can apply for	See below	Customers also eligible to apply for a Clean Heat RI Rebate	Customers also eligible to apply for a RI Energy Standard Rebate
Federal Tax Credits of up to \$2,000: Please see the reverse side for more details!			

Disclaimer: Rebate programs are subject to change. Please visit their respective websites for the latest information.

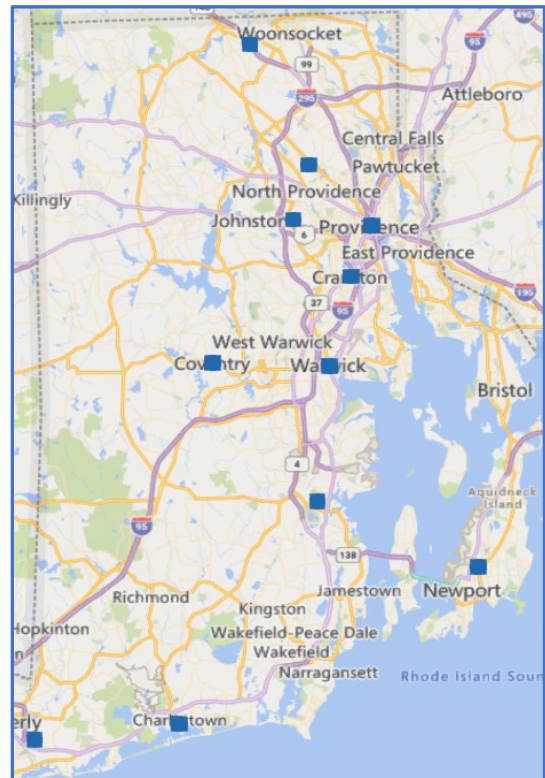
Residential Consumer Products

The Residential Consumer Products program achieved 78 net lifetime MWh of electric savings (0.5% of the lifetime goal) through the first quarter of 2024.

Recycling:

The dehumidifier recycling event schedule has been solidified for 2024 with 15 geographically dispersed events organized throughout the state. These events are immensely popular with RIE customers as witnessed last year when a record 1517 dehumidifiers recycled, the best year ever.

Event Date	City	State
4/6/2024	Pawtucket	RI
4/27/2024	Charlestown	RI
5/4/2024	Providence	RI
5/25/2024	Warwick	RI
6/1/2024	Smithfield	RI
6/29/2024	Cranston	RI
7/6/2024	N. Kingstown	RI
7/27/2024	N. Smithfield	RI
8/3/2024	Westerly	RI
8/31/2024	Middletown	RI
9/7/2024	N. Providence	RI
9/14/2024	Charlestown	RI
9/28/2024	Coventry	RI
10/5/2024	Johnston	RI
10/26/2024	Warwick	RI



The new recycling company that was brought under contract mid-year last year will continue to provide service in 2024 for the dehumidifier drop-off events. The appliance recycling “pick up at the home and small business” request for proposal was issued in the first quarter of 2024. This popular program is expected to re-launch in Q2’2024.

Promoting Energy Star “Most Efficient” (ESME) Products:

The implementation vendor was quite active in the first quarter of 2024 promoting the Energy Star Most Efficient instant rebates in Home Depot and Lowes retail stores across RI region. The instant rebate program strives to make it easy and cost effective for the customer through financial incentives in the form of rebates as well and bold and bright informative marketing materials.

New A-Frame Displays: Home Depot - Smithfield



2024: Most Efficient Clothes Dryers: Home Depot - N. Kingstown



Additionally, the implementation vendor coordinated with RI Energy's retail stores to provide & post in-store promotional material associated with incentivized products to encourage the purchase of Energy Efficient products.

Variable Speed Pool Pumps - Distributors



Air Purifiers: Target - Warwick



Thermostat Display: Home Depot- Smithfield



Consumer Education:

The implementation vendor was extremely busy during the first quarter promoting the new incentives for 2024. Educational tables were staffed each month to educate and promote the customer learning on the Energy Star Most Efficient products offered under the Rhode Island Energy program in Lowes and Home Depot.

These events provide an opportunity for RIE customers to ask questions and gain information about a broad range of energy efficiency programs as well as other programs offered by RIE, such as home audits.

Educational table at Lowe's in Warwick, RI



Challenge – Lowe's & Home Depot confirmed their inability or interest to stock Most Efficient Dehumidifiers across the nation. Additionally, these retailers will not be stocking Energy Star Room Air Conditioners while they move to offer lower price units to drive sales.

Home Energy Reports (HER)

The Home Energy Reports (HER) program achieved 6,868 net lifetime MWh of electric savings (29.4% of the lifetime annual goal) and 14,529 net lifetime MMBtu of gas savings (17.0% of the lifetime goal) through the first quarter of 2024.

In January, Home Energy Reports focused on insulation and weatherization. February HER messaging promoted heat pump water heaters and March featured home energy assessments with a call out to renter and landlord incentives.

Code Compliance Enhancement Initiative (CCEI)

Overview

The Codes & Standards Initiative continues to provide training, circuit riders, resources such as FAQs, technical bulletins and checklists, and a helpline offering technical support, plan review and on-site training.

The Initiative provides support with meeting the current energy code and is preparing the industry for the next energy code that will be adopted in Rhode Island. New trainings have been developed and delivered to address the upcoming requirements associated with the 2024 IECC, which the state intends to adopt in full, without amendments. The 2024 IECC was approved by the ICC in Q1 and should be ready for adoption in Rhode Island by mid-2024. The Initiative will develop an updated toolkit and suite of resources once the 2024 IECC has been published.

Overview of Trainings

Q1 Trainings

- 14 training events with 390 attendees were held during the first quarter
 - 13 residential trainings, with 362 attendees
 - 1 commercial training, with 28 attendees

Q1 Training Topics

- Residential
 - 2024 IECC Update
 - Introduction to Residential Air Source Heat Pumps
 - HVAC & Indoor Air Quality
 - Air Sealing & the New Code
 - Home Comfort - Heating, Cooling & Ventilation
 - Advanced Building Science and Zero Energy Homes
- Commercial
 - Introduction to Commercial Air Source Heat Pumps

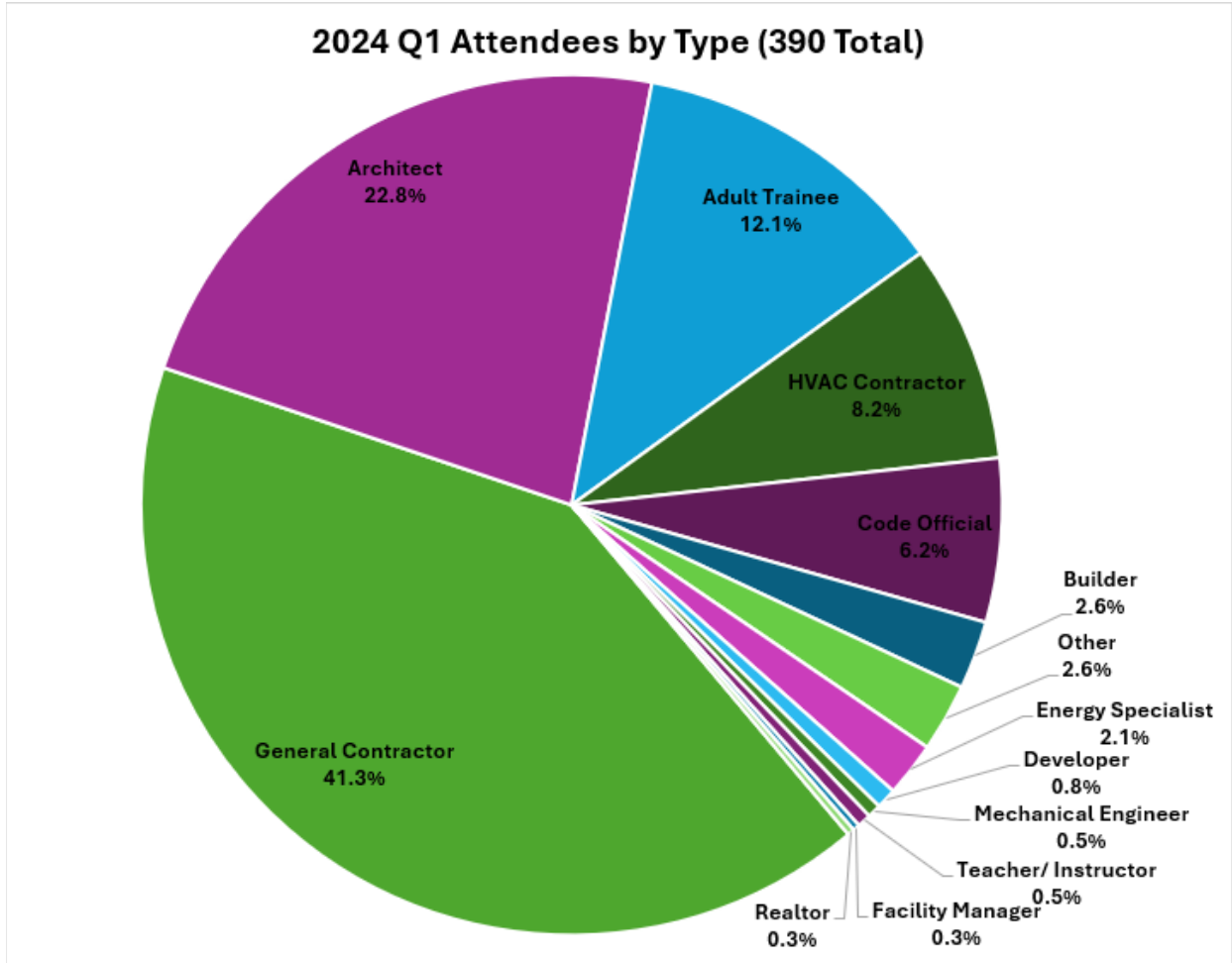
Q1 Training Locations

Some trainings continue to be delivered virtually, particularly those in partnership with AIA-RI, RIBA, and the RI Association of Realtors, who integrate these trainings into the education curriculum for their members

- 8 trainings were held in person (57%) at the following locations
 - Viessmann Manufacturing Co., Warwick

- o Rhode Island Master Plumber & Mechanical Association, Warwick
- o Union Studio Architects, Providence
- o Residential Construction Workforce Partnership, Coventry
- o Sweeney Builders at Arnold Lumber, Wakefield
- o Rhode Island Plumbing & Mechanical Inspectors Association, East Providence
- o JLC Live, Providence

Q1 Training Participants



Q1 Industry Stakeholder Partnership Support, Engagement & Training Highlights

Rhode Island Builders Association (RIBA)

The CSTS Vendor continued to partner with RIBA to deliver energy code trainings as part of their Contractor Training & Development Program

- Q1 topics
 - January: Introduction to Residential Air Source Heat Pumps
 - February: HVAC & Indoor Air Quality
 - March: Advanced Building Science and Zero Energy Homes
- These trainings are approved for RI Contractor Registration & Licensing Board CEUs

The CSTS Vendor continued to submit articles for RIBA's [monthly builder magazine](#) during the quarter

- Q1 topics
 - 2024 RNC Program Offering
 - South County Habitat for Humanity – Zero Energy Homes in Hopkinton
 - Performance vs Prescriptive in the Energy Code

American Institute of Architects - Rhode Island (AIA-RI)

CSTS continued to partner with AIA-RI to offer AIA accredited trainings as part of their monthly Continuing Education virtual Lunch and Learn series

- Q1 topics
 - January: Advanced Building Science and Zero Energy Homes
 - February: Introduction to Commercial Air Source Heat Pumps
 - March: Home Comfort - Heating, Cooling & Ventilation
- Attendee feedback
 - ***In a sea of waste-of-time CEUs, the CLEAResult presentations stand out as useful and interesting learning time. Thank you so much for that, and your attention to sharing detailed information!*** - Tracey D.

Rhode Island Plumbing & Mechanical Inspectors Association (RIPMIA)

CSTS provided a training on HVAC & Indoor Air Quality for RIPMIA members in East Providence

Rhode Island Master Plumber & Mechanical Association (RIMPMA)

CSTS developed a new partnership with RIMPMA to offer training as part of their membership's evening education program.

- In Q1 CSTS held a 2024 IECC Update training for 31 members in Warwick (pictured below)
- Attendee testimonial

- ***“I want to thank you and Jon for last night’s training and dinner. I have received nothing but praise for the information that Jon provided to our members. When the night was over the question asked to me was “when are you going to get this guy back to do another training?”. I think that speaks for itself. Thanks again” - Mike S.***

Residential Construction Career Training

This [20-week evening pre-apprentice training course](#), funded through the RI Department of Labor and Training and Rhode Island Builders Association, is being offered through the [Residential Construction Workforce Partnership](#) (RCWP).

The course provides the basic skills and training needed for entering a career in energy efficiency, including soft skills, introduction to building science, weatherization, and HVAC. The goal is to provide employment opportunities for participants by connecting them with companies and organizations such as CAP agencies who often struggle to attract and retain skilled energy auditors.

Several RI Energy EE programs collaborate to support this course.

- Income Eligible Services (IES)
 - The IES Program Vendor provides training on weatherization and the software tools needed to participate in the program
 - They connect successful graduates with employment opportunities at local CAP agencies
- High Efficiency HVAC
 - The HVAC Vendor provides training on heat pumps and high efficiency heating, cooling, and domestic hot water equipment
- Residential New Construction (RNC)
 - The RNC Vendor provides training on building science and zero energy homes
- CSTS
 - The CSTS Vendor provides training on the energy code, including building science, zero energy, HVAC and air and duct leakage testing verification
- Classes are held on weeknights from 5.30 pm to 8.30 pm.
- During Q1 the CSTS Vendor held two trainings - Advanced Building Science and Zero Energy Homes and Home Comfort - Heating, Cooling & Ventilation (pictured above)

Viessmann Manufacturing, Co.

RI CSTS continued its longstanding partnership with Viessmann in Warwick. Viessmann offers their training space and integrates other trainings into the schedule. The events include tours of their facility and training labs.

In Q1 the CSTS Vendor provided training on Residential Air Source Heat Pumps and Viessmann provided training on Decoding Boiler Ratings.

JLC Live 2024

[JLC LIVE](#) is the most widely attended annual regional trade event for residential construction. Remodelers, home builders, contractors, and other tradespeople from all over the region learn from the leading industry experts through live, on-floor building clinics, demonstrations, and classroom-style conference sessions.

RI CSTS delivered a 3-hour presentation as part of the Construction Skills & Techniques track on Healthy Homes & Indoor Air Quality for over 100 attendees.

2024 IECC Trainings

To help prepare the industry for the anticipated adoption of 2024 IECC in Rhode Island CSTS developed and delivered trainings outlining the content recently finalized by the International Code Council (ICC).

CSTS Updates, Challenges & Solutions

Code Update – Moving from 2018 IECC with RI Amendments to 2024 IECC

- 2023 legislature requires the state to adopt 2024 IECC, without weakening amendments
 - RI General Assembly passed H6101/S0855 Sub A:
<http://webserver.rilegislature.gov/BillText/BillText23/SenateText23/S0855A.pdf>
- 2024 IECC, approved by the ICC in Q1, will be published shortly and could be adopted in Rhode Island as early as mid-2024
 - Weakening residential amendments, which have been in place since the state's adoption of 2012 IECC in 2013, will finally be removed
 - The removal of these amendments, as well as the adoption of the new base code will result in a steep learning curve for the industry
- CSTS is working closely with key industry stakeholders including the Building Commissioner and RIBA to support the transition

- In advance of adoption, CSTS developed and delivered new presentations to prepare the industry for significant changes in the residential energy code, including how designers, builders, and contractors will need to comply with 2024 IECC, as well as changes for code inspectors to verify compliance
- Once 2024 IECC has been published, the CSTS Vendor will update existing toolkits and resources such as FAQs, checklists, and technical bulletins for distribution

Large Commercial New Construction

The Large Commercial New Construction program achieved 9,735 net lifetime MWh of electric savings (5.4% of goal) and 7,197 net lifetime MMBtu of gas savings (1.1% of goal) through the first quarter of 2024.

There are currently 88 active projects in Q1 representing approximately 8 million square feet of building space. For these 88 projects:

- 15 projects are in the earliest stages of measure and project qualification
- 13 projects have a Technical Assistance Study in progress
- 11 projects are using the New Construction Zero Net Energy/Low-EUI Pathway and 7 projects are using the Non-EUI Pathway (47 other projects are yet to be classified)
- 2 applications are in “Post Installation” status and 27 are either “Application Created” or “Under Construction”.

Large Commercial Retrofit

The Large Commercial Retrofit program achieved 24,244 net lifetime MWh of electric savings (10.0% of goal) and 100 net lifetime MMBtu of gas savings (0.0% of goal) through the first quarter of 2024.

Industrial Initiative & Building Analytics Program

A jewelry manufacturer implemented a Building Analytics Program (“BAP”) project at their facility. This Program helps lower operating costs and improve occupant comfort by leveraging the data available through Building Automation System (“BAS”).

The BAS points were mapped to the BAP service provider’s cloud-based software to provide continuous analysis on the building’s operations for actionable insights. These actionable insights can be low-/no-cost energy efficiency measures that are then implemented by the facility staff.

The BAP service provider, through their review of the analytics and customer schedules, identified that the daily run hours appeared to be excessive relative to the building’s operating schedules. The BAP service provider worked with the facility staff to adjust the schedules. Compared to the baseline period, the schedules for the occupied run-hours decreased by approximately 3 hours per day.

EnergySmart Grocer Initiative

Activity in the grocer market for energy efficiency projects continues to be slow. The largest grocer in Rhode Island has pulled back throughout their portfolio, citing financial difficulties and poor sales nation-wide. The Company anticipates activity picking up in Quarters 2 through 4, but nationally we are seeing low engagement across all our grocer customers as grocers start planning refrigerant retrofits which are costly. Customers are continuing to approve low-cost measures such as coil cleaning.

Strategic Energy Management Partnerships (SEMP)

Rhode Island Energy has a total of 12 SEMP partners including two public entities, six colleges and universities, an industrial park, a healthcare provider, and two large retail businesses. Since 2013, more than 825 energy efficiency projects have been implemented by Rhode Island Energy and its SEMP partners.

On February 8th, Rhode Island Energy hosted a Future of Natural Gas workshop at the Quonset Development Corporation, which was attended by approximately 20 customers and partners.

Small Business Direct Install

The Small Business Direct Install (SBDI) program achieved 8,856 net lifetime MWh of electric savings (14.8% of goal) and 15,847 lifetime MMBtu of gas savings (13.4% of goal) through the first quarter of 2024.

LED Retrofit Kits and Luminaires

The table below shows the number of luminaires and retrofit kits with controls through Q1, 2024.

Period	Luminaires	Luminaires with controls	Retrofit kits	Retrofit kits with controls
2020	13,032	149	17,260	450
2021	12,804	246	15,932	908
2022	9,918	2,256	8,675	856

2023	9100	1,152	6,009	589
2024	2115	198	1,544	151

Highlights

RISE recently added two summer temporary positions for canvassing and marketing outreach, with one being bilingual. These canvassers will be primarily used for Main Street outreach, with the first Main Street campaign beginning May 13 in Providence and continuing for two weeks.

A facility containing a dentist office completed a lighting and weatherization project for a total cost of approximately \$12,500 and savings of approximately 3,600 kWh and 250 therms. An event hall and banquet facility installed lighting, variable frequency drives and weatherization measures for a total cost of approximately \$8,000 and savings of approximately 4,300 kWh and 100 therms.

Challenges and Responses

RISE is seeking to minimize the end of year “hockey stick” effect by offering enhanced incentives earlier in the year for customers that have chosen not to proceed with their projects. This should result in customers moving forward with projects sooner in the year which spreads the workload more efficiently throughout the year.

Evaluation, Measurement, and Verification

No new evaluation studies were completed in the first quarter of 2024.

The regional 2024 Avoided Energy Supply Component Study was completed. This provides updated avoided costs for various energy components and will be used in determining benefits and cost-effectiveness of measures and programs in the 2025 Energy Efficiency Plan.

Several studies were in progress at the end of the first quarter:

- C&I New Construction Baseline Study
- Automated RTU Optimization Demonstration Evaluation
- Residential Nonparticipant Characterization and Segmentation Research
- Impact Evaluation of Program Year (PY) 2022 Custom Gas Installations
- Impact Evaluation of Program Year (PY) 2022 Custom Electric Installations
- (new) Comprehensive Measure Life Review, Phase II

The Company will provide further updates on these ongoing studies and new studies throughout 2024.

Demonstrations, Pilots, Assessments

PDA Name		Q1 2024 Updates
<u>Automated RTU Optimization - Demonstration - C&I</u>	Date	5/15/2024
	Stage	Evaluate
	Recent Activity	Evaluation report completed
	Next steps	Integrate strategies into program design and implementation
<u>Weatherization – Demonstration - C&I</u>	Date	5/15/2024
	Stage	Design
	Recent Activity	Vendor is using Weatherization Tool to identify energy efficiency opportunities
	Next Steps	Continued deployment
<u>Residential Equity Outreach Assessment – Assessment - Resi</u>	Date	5/15/2024
	Stage	Design
	Recent Activity	Identified non-profit and municipal partners and began developing collaborative landlord & renter outreach strategies, catalogued additional funding opportunities for scaling
	Next Steps	Continue developing outreach strategies and pursue action plan
<u>Multifamily Financing – Demonstration - Resi</u>	Date	5/15/24
	Stage	Design
	Recent Activity	Ongoing talks with BlocPower to determine best project structure
	Next Steps	Agree on project structure with BlocPower

RHODE ISLAND ENERGY ENERGY-EFFICIENCY PROGRAMS IN RHODE ISLAND

Table 1: Summary of Electric 2024 Target and Preliminary 1st Quarter Results

ELECTRIC PROGRAMS Sector and Program	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(18)	(13)	(14)	(15)	(19)	(16)	(17)	
	Demand Reduction (Annual kW)			Energy Savings (Annual MWh)			Customer Participation			Expenses (\$ 000)				Energy Savings (Lifetime MWh)				\$/Lifetime kWh		
	Target	Year To Date	Pct Achieved	Target	Year To Date	Pct Achieved	Target	Year To Date	Pct Achieved	Budget	Year To Date	Pct Achieved	Year End Forecast	Target	Year to Date	Pct Achieved	Year End Forecast	Target \$/kWh	Year to Date	
Commercial and Industrial																				
Large Commercial New Construction	1,499	136	9.1%	11,956	521	4.4%	46	5	11.3%	\$ 9,227.2	\$ 632.7	6.9%	54.1%	181,356	9,735	5.4%	59.7%	\$ 0.051	\$ 0.065	
Large Commercial Retrofit	6,157	505	8.2%	34,603	3,846	11.1%	2,170	638	29.4%	\$ 22,797.9	\$ 1,081.1	4.7%	103.4%	242,515	24,244	10.0%	89.3%	\$ 0.094	\$ 0.045	
Small Business Direct Install	684	203	29.7%	8,370	1,093	13.1%	343	103	30.1%	\$ 8,199.9	\$ 529.3	6.5%	97.2%	59,873	8,856	14.8%	91.0%	\$ 0.137	\$ 0.060	
Community Based Initiatives - C&I										\$ 57.9	\$ 0.4	0.8%	100.0%							
Commercial Workforce Development										\$ 74.9	\$ -	0.0%	100.0%							
SUBTOTAL	8,340	844	10.1%	54,929	5,461	9.9%	2,559	746	29.2%	\$ 40,357.8	\$ 2,243.5	5.6%	90.9%	483,744	42,835	8.9%	78.4%	\$ 0.083	\$ 0.052	
Income Eligible Residential																				
Single Family - Income Eligible Services	320	23	7.1%	2,466	173	7.0%	3,153	329	10.4%	\$ 12,237.4	\$ 1,493.1	12.2%	100.0%	36,840	2,865	7.8%	100.0%	\$ 0.332	\$ 0.521	
Income Eligible Multifamily	45	0	0.0%	1,220	0	0.0%	2,823	0	0.0%	\$ 3,784.2	\$ 63.2	1.7%	100.0%	18,518	0	0.0%	100.0%	\$ 0.204	\$ -	
SUBTOTAL	364	23	6.3%	3,686	173	4.7%	5,976	329	5.5%	\$ 16,021.6	\$ 1,556.3	9.7%	100.0%	55,358	2,865	5.2%	100.0%	\$ 0.289	\$ 0.543	
Non-Income Eligible Residential																				
Residential New Construction	18	7	38.8%	735	26	3.6%	415	132	31.8%	\$ 1,312.7	\$ 123.2	9.4%	100.0%	15,904	591	3.7%	100.0%	\$ 0.083	\$ 0.208	
ENERGY STAR® HVAC	570	11	2.0%	6,598	177	2.7%	6,457	597	9.2%	\$ 6,570.7	\$ 547.0	8.3%	100.0%	112,749	3,159	2.8%	100.0%	\$ 0.058	\$ 0.173	
EnergyWise	228	38	16.6%	1,264	220	17.4%	9,592	1,857	19.4%	\$ 16,277.7	\$ 2,286.9	14.0%	100.0%	14,991	2,592	17.3%	100.0%	\$ 1.086	\$ 0.882	
EnergyWise Multifamily	44	0	0.7%	505	3	0.6%	1,768	40	2.3%	\$ 1,291.9	\$ 51.2	4.0%	100.0%	8,122	25	0.3%	100.0%	\$ 0.159	\$ 2.058	
Residential Consumer Products	631	1	0.2%	2,815	7	0.3%	26,628	31	0.1%	\$ 1,987.4	\$ 212.4	10.7%	85.0%	15,323	78	0.5%	65.0%	\$ 0.130	\$ 2.733	
Home Energy Reports	3,212	944	29.4%	23,359	6,868	29.4%	280,116	22,379	8.0%	\$ 2,123.3	\$ 555.5	26.2%	86.7%	23,359	6,868	29.4%	29.4%	\$ 0.091	\$ 0.081	
Community Based Initiatives - Residential										\$ 139.4	\$ -	0.0%	100.0%							
Comprehensive Marketing - Residential										\$ 326.5	\$ 37.6	11.5%	100.0%							
SUBTOTAL	4,702	1,002	21.3%	35,276	7,301	20.7%	324,977	25,037	7.7%	\$ 30,029.6	\$ 3,813.8	12.7%	98.1%	190,447	13,313	7.0%	88.5%	\$ 0.158	\$ 0.286	
Regulatory																				
EERMC										\$ 645.1	\$ 425.2	65.9%	100.0%							
OER										\$ 1,387.7	\$ 304.4	21.9%	100.0%							
RI Infrastructure Bank										\$ 3,737.5	\$ 934.4	25.0%	100.0%							
SUBTOTAL										\$ 5,770.3	\$ 1,663.9	28.8%	100.0%							
TOTAL	13,406	1,869	13.9%	93,891	12,935	13.8%	333,513	26,112	7.8%	\$ 92,179.3	\$ 9,277.4	10.1%	95.4%	729,550	59,012	8.1%	82.7%	\$ 0.126	\$ 0.157	

NOTES

- (1)(4)(7) Targets from Docket 23-35-EE - Attachment 5, Table E-7, Refiled December 20, 2023.
 - (3) Pct Achieved is Column (2)/ Column (1).
 - (6) Pct Achieved is Column (5)/ Column (4).
 - (7) Participation was planned and is reported in 'net' terms which takes into account free-ridership and spillover.
 - (9) Pct Achieved is Column (8)/ Column (7).
 - (10) Approved Implementation Budget from Docket 23-35-EE, Attachment 5 Table E-3 (electric), Refiled December 20, 2023.
 - (11) Year To Date Expenses include Implementation expenses.
 - (12) Pct Achieved is Column (11)/ Column (10).
 - (16) Planned \$/lifetime MWh from Docket 23-35-EE- Attachment 5, Table E-5, Refiled December 20, 2023 - adjusted to reflect format of quarterly report. Program Implementation Expenses/lifetime kWh.
 - (17) \$/lifetime kWh = Column (11)/Column (14)
 - (18) (19) Year End Spending and Energy Savings forecasts are best estimates based on the information available and may change throughout the year.
- Values in quarterly reports are preliminary and subject to change. Data is finalized in the Year-End Report.

RHODE ISLAND ENERGY ENERGY-EFFICIENCY PROGRAMS IN RHODE ISLAND
Table 2: Summary of Gas 2024 Target and Preliminary 1st Quarter Results

GAS PROGRAMS Sector and Program	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(16)	(10)	(11)	(12)	(17)	(13)	(14)	(15) Peak Hour Gas Demand Savings (MMBtu)
	Energy Savings (Annual MMBtu)			Customer Participation			Expenses (\$ 000)				Energy Savings (Lifetime MMBtu)				\$/Lifetime MMBtu		
	Year To Target	Date	Pct Achieved	Target	Year To Date	Pct Achieved	Budget	Year To Date	Pct Achieved	Year End Forecast	Planned	Year To Date	Pct Achieved	Year End Forecast	Planned	Year to Date	Year to Date
Commercial and Industrial																	
Large Commercial New Construction	44,443	506	1.1%	63	2	2.8%	\$ 2,236.4	\$ 186.1	8.3%	46.3%	657,560	7,197	1.1%	32.8%	\$ 3.40	\$ 25.86	0.25
Large Commercial Retrofit	100,812	9	0.0%	59	2	3.7%	\$ 4,476.5	\$ (51.3)	-1.1%	36.4%	1,075,167	100	0.0%	71.8%	\$ 4.16	\$ (512.20)	0.00
Small Business Direct Install	9,857	1,095	11.1%	148	71	48.3%	\$ 757.3	\$ 108.6	14.3%	89.6%	118,655	15,847	13.4%	90.8%	\$ 6.38	\$ 6.85	0.55
Commercial & Industrial Multifamily	4,205	800	19.0%	495	3	0.6%	\$ 879.8	\$ 180.9	20.6%	100.0%	65,609	18,924	28.8%	100.0%	\$ 13.41	\$ -	0.40
Commercial Pilots							\$ -	\$ -	0.0%	0.0%							
Community Based Initiatives - C&I							\$ 3.7	\$ -	0.0%	100.0%							
Commercial Workforce Development							\$ 32.1	\$ -	0.0%	100.0%							
SUBTOTAL	159,317	2,410	1.5%	765	78	10.2%	\$ 8,385.9	\$ 424.3	5.1%	50.8%	1,916,991	42,068	2.2%	60.5%	\$ 4.37	\$ 10.09	1.20
Income Eligible Residential																	
Single Family - Income Eligible Services	5,992	715	11.9%	808	90	11.1%	\$ 4,509.4	\$ 633.8	14.1%	100.0%	121,326	14,300	11.8%	100.0%	\$ 37.17	\$ 44.32	0.36
Income Eligible Multifamily	10,375	0	0.0%	2,779	49	1.8%	\$ 3,076.5	\$ 17.5	0.6%	100.0%	166,156	0	0.0%	100.0%	\$ 18.52	#DIV/0!	-
SUBTOTAL	16,367	715	4.4%	3,587	139	3.9%	\$ 7,585.9	\$ 651.3	8.6%	100.0%	287,482	14,300	5.0%	100.0%	\$ 26.39	\$ 45.55	0.36
Non-Income Eligible Residential																	
EnergyWise	31,871	6,030	18.9%	1,739	921	53.0%	\$ 11,084.3	\$ 1,618.0	14.6%	100.0%	613,643	140,084	22.8%	100.0%	\$ 18.06	\$ 11.55	3.02
Energy Star® HVAC	11,329	1,094	9.7%	2,943	139	4.7%	\$ 1,516.1	\$ 209.1	13.8%	100.0%	219,298	18,890	8.6%	100.0%	\$ 6.91	\$ 11.07	0.55
EnergyWise Multifamily	5,061	892	17.6%	3,499	49	1.4%	\$ 1,439.7	\$ 81.1	5.6%	100.0%	104,240	20,536	19.7%	100.0%	\$ 13.81	\$ 3.95	0.45
Home Energy Reports	85,663	52,374	61.1%	132,345	8,888	6.7%	\$ 354.9	\$ 94.2	26.5%	100.0%	85,663	14,529	17.0%	100.0%	\$ 4.14	\$ 6.48	26.19
Residential New Construction	3,239	373	11.5%	466	116	24.9%	\$ 579.9	\$ 162.4	28.0%	100.0%	73,327	8,706	11.9%	100.0%	\$ 7.91	\$ 18.65	0.19
Comprehensive Marketing - Residential							\$ 79.7	\$ 14.2	17.8%	100.0%							
Community Based Initiatives - Residential							\$ 46.5	\$ -	0.0%	100.0%							
SUBTOTAL	137,163	60,763	44.3%	140,993	10,114	7.2%	\$ 15,101.0	\$ 2,178.9	14.4%	100.0%	1,096,171	202,745	18.5%	100.0%	\$ 13.78	\$ 10.75	30.38
Regulatory																	
EERMC							\$ 345.9	\$ 283.4	81.9%	100.0%							
OER							\$ 642.8	\$ 203.3	31.6%	100.0%							
RI Infrastructure Bank							\$ 1,262.5	\$ 315.6	25.0%	100.0%							
SUBTOTAL							\$ 2,251.2	\$ 802.3	35.6%	100.0%							
TOTAL	312,846	63,888	20.4%	145,345	10,331	7.1%	\$ 33,324.0	\$ 4,056.9	12.2%	87.6%	3,300,644	259,113	7.9%	77.1%	\$ 10.10	\$ 15.66	31.94

NOTES
(1)(4) Targets from Docket 23-35-EE- Attachment 6, Table G-7, Refiled December 20, 2023.
(3) Pct Achieved is Column (2)/ Column (1).
(4) Participation was planned and is reported in 'net' terms which takes into account free-ridership and spillover.
(6) Pct Achieved is Column (5)/ Column (4).
(7) Approved Implementation Budget from Docket 23-35-EE, Attachment 6 Table G-3, Refiled December 20, 2023.
(8) Year To Date Expenses include Implementation expenses.
(9) Pct Achieved is Column (8)/ Column (7).
(13) Planned \$/lifetime MMBtu from Docket 23-35-EE- Attachment 6, Table G-5, Refiled December 20, 2023 - adjusted to reflect format of quarterly report. Program Implementation Expenses/lifetime MMBtu.
(14) \$/lifetime MMBtu = Column (8)*1000/Column (11)
(15) Peak Hour Gas Demand Savings is a test metric in 2024 and represents a rough approximation of peak-hour gas demand impacts. Column(2) *0.01 *0.05
(16) (17) Year End Spending and Energy Savings forecasts are best estimates based on the information available and may change throughout the year.
Values in quarterly reports are preliminary and subject to change. Data is finalized in the Year-End Report.

RHODE ISLAND ENERGY ELECTRIC ENERGY EFFICIENCY PROGRAMS IN RHODE ISLAND
Table 3: Rhode Island Energy 2024 Revolving Loan Funds

Large C&I Electric Revolving Loan Fund

Small Business Electric Revolving Loan Fund

<u>Income Statement</u>		<u>Income Statement</u>	
(1) 2024 Funds Available	\$12,857,201	(1) 2024 Funds Available	\$3,894,924
(2) 2024 Loan budget	\$14,000,000	(2) 2024 Loan budget	\$2,000,000
(3) Committed	\$2,780,824	(3) Committed	\$315,331
(4) Paid	\$64,845	(4) Paid	\$346,484
(5) Repayments	\$1,555,902	(5) Repayments	\$285,600
(6) Available 03/31/24	\$11,567,434	(6) Available 03/31/24	\$3,518,708
(7) Outstanding loan volume	\$12,430,761	(7) Outstanding loan volume	\$488,084
(8) Loan defaults during period (\$)	\$0	(8) Loan defaults during period (\$)	\$24,092
(9) Arrears over 120 days at period end (\$)	\$31,587	(9) Arrears over 120 days at period end (\$)	\$7,559
 <u>Program Impact</u>		 <u>Program Impact</u>	
(10) Number of loans	25	(10b) Participants	119
(10b) Participants	25	(11) Annual Savings (Gross MWh)	1,325
(11) Annual Savings (Gross MWh)	1,941	(12) Annual Savings (Net MWh)	1,088
(12) Annual Savings (Net MWh)	1,557	(13) Lifetime Savings (Gross MWh)	11,329
(13) Lifetime Savings (Gross MWh)	20	(14) Lifetime Savings (Net MWh)	8,824
(14) Lifetime Savings (Net MWh)	16,055	(15) Annual Savings (Gross kW)	258
(15) Annual Savings (Gross kW)	4	(16) Annual Saving (Net kW)	203
(16) Annual Saving (Net kW)	4	(17) Total associated incentive volume (\$)	\$432,860
(17) Total associated incentive volume (\$)	\$722,572	(18) Total annual estimated energy cost savings (\$)	\$192,581
(18) Total annual estimated energy cost savings (\$)	\$275,656		

Rhode Island Public Energy Partnership (RI PEP)

<u>Income Statement</u>	
(1) 2023 Funds Available	\$0
(2) 2023 Loan budget	\$0
(3) Committed	\$0
(4) Paid	\$0
(4a) Funds Returned to OER	\$0
(4b) Funds Transferred to RGGI ASHP	\$54,162
(5) Repayments	\$0
(6) Available 03/31/24	\$0
(7) Outstanding loan volume	\$0
(8)	0
(9) Arrears over 120 days at period end (\$)	\$0
 <u>Program Impact</u>	
(10) Number of loans	0
(10b) Participants	0
(11) Annual Savings (Gross MWh)	0
(12) Annual Savings (Net MWh)	0
(13) Lifetime Savings (Gross MWh)	0
(14) Lifetime Savings (Net MWh)	0
(15) Annual Savings (Gross kW)	0
(16) Annual Saving (Net kW)	0
(17) Total associated incentive volume (\$)	\$0
(18) Total annual estimated energy cost savings (\$)	\$0

Notes

- 1 Amount available as of January 1, 2024. Includes line (6) "Available 03/31/24" plus line (3) "Committed" in Table E-6 and G-6 of the 2023 Year End Report.
 - 2 Budget adopted by Sales Team for 2024 operations. Budget includes projections of repayments made during 2024.
 - 3 As of March 31, 2024.
 - 4 As of March 31, 2024. This includes all projects paid through March 31, 2024 and the OBR associated with those projects. OBR payment are processed once the associated incentive has been paid, usually in batches.
 - 4a Funds returned to RI OER.
 - 4b Funds transferred to RGGI Air Source Heat Pump Program in 2023
 - 5 As of March 31, 2024. This includes all projects paid through March 31, 2024 and the OBR associated with those projects. OBR payments are processed once the associated incentive has been paid.
 - 6 Fund balance as of March 31, 2024. Committed funds are subtracted from this amount.
 - 7 Total outstanding loan balance. Loans lent out that still need to be paid back. This includes loans from previous years.
 - 8 Total loan value in default during period.
 - 9 Total loan value in arrears for over 120 days as of March 31, 2024.
 - 10 As of March 31, 2024
 - Unique customer names for large business (one customer name can have multiple sub accounts as is in the case of a franchise). Customer accounts used for small business
 - 10b (not adjusted for net-to-gross).
 - 11 As of March 31, 2024
 - 12 As of March 31, 2024
 - 13 As of March 31, 2024
 - 14 As of March 31, 2024
 - 15 As of March 31, 2024
 - 16 As of March 31, 2024
 - 17 Incentives paid out with loans.
 - 18 Estimated energy cost savings to loan fund participants.
- Values in quarterly reports are preliminary and subject to change. Data is finalized in the Year-End Report.

RHODE ISLAND ENERGY GAS ENERGY EFFICIENCY PROGRAMS IN RHODE ISLAND
Table 4: Rhode Island Energy 2024 Revolving Loan Funds

Large C&I Gas Revolving Loan Fund			Rhode Island Public Energy Partnership (RI PEP) Gas		
<u>Income Statement</u>			<u>Income Statement</u>		
(1)	2024 Funds Available	\$1,168,890	(1)	2024 Funds Available	\$964
(2)	2024 Loan budget	\$2,500,000	(4)	Paid	\$0
(3)	Committed	\$0	(4a)	Funds Returned to OER	\$0
(4)	Paid	\$254,025	(5)	Repayments	\$0
(5)	Repayments	\$148,698	(6)	Available 03/31/24	\$964
(6)	<u>Available 03/31/24</u>	<u>\$1,063,563</u>	(7)	Outstanding loan volume	\$0
(7)	Outstanding loan volume	\$1,080,952	(8)	Loan defaults during period (\$)	\$0
(8)	Loan defaults during period (\$)	\$0	(9)	Arrears over 120 days at period end (\$)	\$0
(9)	Arrears over 120 days at period end (\$)	\$0			
 <u>Program Impact</u>			 <u>Program Impact</u>		
(10)	Number of loans	2	(10)	Number of loans	0
(10b)	Participants	3	(10b)	Participants	0
(11)	Annual Savings (Gross MMBtu)	415	(11)	Savings (MMBtu)	0
(12)	Annual Savings (Net MMBtu)	340			
(13)	Lifetime Savings (Gross MMBtu)	7,304			
(14)	Lifetime Savings (Net MMBtu)	57,277			
(15)	Total associated incentive volume (\$)	\$11,250			
(16)	Total annual estimated energy cost savings (\$)	\$7,116			

Notes

- 1 Amount available as of January 1, 2024. Includes line (6) "Available 03/31/24" plus line (3) "Committed" in Table E-6 and G-6 of the 2023 Year End Report.
 - 2 Budget adopted by Sales Team for 2024 operations. Budget includes projections of repayments made during 2024.
 - 3 As of March 31, 2024. This includes all project paid through March 31, 2024 and the OBR associated with those projects. OBR payment are processed once the associated incentive
 - 4 As of March 31, 2024. This includes all project paid through March 31, 2024 and the OBR associated with those projects. OBR payment are processed once the associated incentive has been paid usually in batches.
 - 5 As of March 31, 2024
 - 6 Fund balance as of March 31, 2024. Committed funds are subtracted from this amount.
 - 7 Total outstanding loan balance. Loans lent out that still need to be paid back. This includes loans from previous years.
 - 8 Total loan value in default during period.
 - 9 Total loan value in arrears for over 120 days as of March 31, 2024.
 - 10 As of March 31, 2024
 - 10b Available 03/31/24
 - 11 As of March 31, 2024
 - 12
 - 13 As of March 31, 2024
 - 14 As of March 31, 2024
 - 15 Incentives paid out with loans.
 - 16 Estimated energy cost savings to loan fund participants.
- Values in quarterly reports are preliminary and subject to change. Data is finalized in the Year-End Report.

**Table 5
Rhode Island Energy
2024 Test Metrics**

Carbon Reduction¹

	CO2 (Electricity)	CO2 (Natural Gas)	CO2 (Oil)	CO2 (Propane)	CO2 (Total)
Residential	2,789	3,555	286	11	6,641
Income Eligible	66	42	54	4	166
C&I	2,086	141	(6)	-	2,221
Total	4,941	3,737	334	15	9,028

NOTES

¹ Carbon emissions values are from AESC 2021, Appendix G Table 159.

Values in quarterly reports are preliminary and subject to change. Data is finalized in the Year-End Report.