

January 7, 2022

VIA ELECTRONIC MAIL

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

RE: Docket 5189– 2022 Annual Energy Efficiency Program Plan Responses to PUC Data Requests - Set 5 (Complete Set)

Dear Ms. Massaro:

On behalf of The Narragansett Electric Company d/b/a National Grid (“National Grid” or the “Company”), attached, please find the electronic version of the Company’s complete set of responses to the Public Utilities Commission’s (“PUCs”) Fifth Set of Data Requests in the above referenced docket. Bates stamp has been applied to the attached electronic version.¹

Thank you for your attention to this filing. If you have any questions or concerns, please do not hesitate to contact me at 401-784-4263.

Sincerely,



Andrew S. Marcaccio

Enclosures

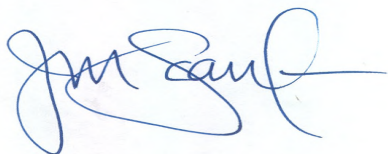
cc: Docket 5189 Service List
Margaret Hogan, Esq.
John Bell, Division

¹ Per the Commission’s request, the Company is providing one copy of this transmittal for the Commission’s file in this docket and six (6) copies, 3-hole punched for the Commission.

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

January 7, 2022
Date

**Docket No. 5189 - National Grid – 2022 Annual Energy Efficiency Program
Service list updated 11/29/2021**

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PUC 5-1

Request:

To illustrate how changes in AESC Study values affect benefits calculations, consider a hypothetical scenario in which the Company had estimated the dollar value of benefits from its 2021 Energy Efficiency Program Plan (Docket No. 5076) using the results of the 2021 AESC Study (as opposed to the results of the 2018 AESC Study). For both the 2021 gas and electric Energy Efficiency Programs, please recalculate Tables E-6 and G-6 using the results of the 2021 AESC Study. Then, using similar formatting as Tables E-6 and G-6, provide two results tables (one for gas and one for electric) that compare the dollar value of each benefits category in Docket No. 5076 to the Company's estimate of the dollar value of each benefits category using the results of the 2021 AESC Study. (Note: for those benefits categories whose associated dollar values are not sourced from the AESC Study, assume no change).

Response:

Attachments PUC 5-1-1 (electric) and PUC 5-1-2 (gas) show the recalculated Tables E-6 and G-6 from 2021 Energy Efficiency Program Plan (Docket No. 5076) using the results of the 2021 AESC Study. Attachments PUC 5-1-3 (electric) and PUC 5-1-4 (gas) show the dollar value difference in each benefits category between the filed table in Docket 5076¹ and the values shown in PUC 5-1-1 and PUC 5-1-2.

Isolating the specific variables covered by the AESC study, total benefits increased from using values from AESC 2018 to using values from AESC 2021. This was primarily driven by an increase in the carbon value to from \$72/short ton² (in 2021 dollars) to \$125/short ton³. Please see RR-6 to see how PIM-eligible net benefits changed from AESC 2018 to AESC 2021.

¹ [http://www.ripuc.ri.gov/eventsactions/docket/5076-NGrid-EE-ComplianceFiling%20\(12-22-2020\).pdf](http://www.ripuc.ri.gov/eventsactions/docket/5076-NGrid-EE-ComplianceFiling%20(12-22-2020).pdf)

² AESC 2021, page 183. https://www.synapse-energy.com/sites/default/files/AESC%202021_20-068.pdf

³ PUC 1-32.

Attachment PUC 5-1-1
National Grid
Electric Summary of 2021 Benefits using AESC 2021 Study Values

Total	Total (Economic Excluded)	Benefits (000's)																	
		Capacity					Energy				Non-Electric				Societal				
		Summer Generation	Capacity DRPE	Trans	Dist	Reliability	Winter		Summer		Electric Energy DRPE	Natural Gas	Oil	Other Resource	Non Resource	Carbon	NOx	Economic	
							Winter Peak	Winter Off Peak	Summer Peak	Summer Off Peak									
Non-Income Eligible Residential																			
Residential New Construction	\$7,269	\$5,013	\$44	\$39	\$86	\$84	\$0	\$451	\$594	\$178	\$135	\$336	\$0	\$275	\$1,734	\$42	\$985	\$28	\$2,256
ENERGY STAR® HVAC	\$14,369	\$9,416	\$159	\$135	\$310	\$304	\$2	\$1,556	\$1,882	\$186	\$156	\$1,255	\$545	\$91	-\$13	\$225	\$2,547	\$74	\$4,953
EnergyWise	\$32,515	\$17,921	\$162	\$202	\$324	\$318	\$3	\$279	\$279	\$197	\$171	\$349	\$0	\$9,671	\$225	\$1,320	\$3,928	\$494	\$14,594
EnergyWise Multifamily	\$7,947	\$4,189	\$104	\$89	\$202	\$198	\$1	\$87	\$81	\$119	\$101	\$117	\$0	\$634	\$27	\$1,955	\$441	\$35	\$3,758
Home Energy Reports	\$8,049	\$5,407	\$207	\$451	\$366	\$359	\$6	\$647	\$532	\$252	\$183	\$641	\$0	\$0	\$0	\$0	\$1,739	\$23	\$2,642
ENERGY STAR® Lighting	\$13,780	\$5,393	\$194	\$548	\$421	\$413	\$7	\$658	\$555	\$258	\$194	\$806	-\$223	-\$318	-\$141	\$822	\$1,217	-\$17	\$8,387
Residential Consumer Products	\$12,083	\$8,008	\$291	\$635	\$659	\$646	\$8	\$719	\$741	\$408	\$394	\$1,203	\$14	\$40	\$19	\$0	\$2,181	\$31	\$4,075
Non-Income Eligible Residential SUBTOTAL	\$96,011	\$55,347	\$1,161	\$2,119	\$2,368	\$2,322	\$27	\$4,397	\$4,664	\$1,597	\$1,333	\$4,707	\$336	\$10,393	\$1,850	\$4,364	\$13,039	\$669	\$40,664
Income Eligible Residential																			
Single Family - Income Eligible Services	\$35,343	\$24,296	\$267	\$259	\$529	\$518	\$3	\$835	\$915	\$400	\$410	\$778	\$77	\$5,046	\$362	\$10,304	\$3,309	\$283	\$11,048
Income Eligible Multifamily	\$6,958	\$2,734	\$28	\$31	\$55	\$54	\$0	\$74	\$74	\$38	\$33	\$79	\$0	\$644	\$43	\$1,197	\$350	\$34	\$4,233
Income Eligible Residential SUBTOTAL	\$42,301	\$27,030	\$295	\$290	\$584	\$572	\$4	\$910	\$990	\$437	\$444	\$857	\$77	\$5,690	\$404	\$11,501	\$3,659	\$316	\$15,271
Commercial & Industrial																			
Large Commercial New Construction	\$60,192	\$34,726	\$1,561	\$1,231	\$3,024	\$2,965	\$15	\$4,353	\$2,796	\$3,343	\$2,289	\$4,006	-\$345	\$0	\$4	\$1,781	\$7,612	\$90	\$25,465
Large Commercial Retrofit	\$339,264	\$158,759	\$6,592	\$7,646	\$13,362	\$13,104	\$96	\$16,300	\$14,122	\$10,643	\$7,473	\$19,560	-\$6,233	\$0	\$193	\$26,561	\$29,381	-\$41	\$180,506
Small Business Direct Install	\$37,811	\$20,311	\$576	\$752	\$1,198	\$1,174	\$9	\$2,330	\$1,334	\$1,917	\$961	\$3,231	-\$724	\$0	\$0	\$2,941	\$4,599	\$12	\$17,501
C&I SUBTOTAL	\$437,267	\$213,796	\$8,729	\$9,629	\$17,583	\$17,244	\$121	\$22,983	\$18,252	\$15,903	\$10,723	\$26,797	-\$7,302	\$0	\$197	\$31,283	\$41,593	\$62	\$223,472
TOTAL	\$575,579	\$296,172	\$10,185	\$12,038	\$20,535	\$20,138	\$152	\$28,289	\$23,905	\$17,938	\$12,500	\$32,361	-\$6,889	\$16,083	\$2,451	\$47,148	\$58,290	\$1,047	\$279,407

Attachment PUC 5-1-2
National Grid
Natural Gas Summary of 2021 Benefits using AESC 2021 Study Values

Total	Total (Economic Excluded)	Benefits (000's)																			
		Natural Gas Benefits				Electric Capacity					Electric Energy					Non-Electric and Non-Gas			Societal Benefits		
		Natural Gas	Natural Gas DRPE	Summer Generation	Capacity DRPE	Transmission	Distribution	Reliability	Winter		Summer		Electric Energy DRPE	Oil	Other-Resource	Non-Resource	Carbon	NOx	Economic		
									Peak	Off Peak	Peak	Off Peak									
Non-Income Eligible Residential																					
EnergyWise	\$18,628	\$10,429	\$4,173	\$34	\$59	\$103	\$76	\$74	\$5	\$45	\$51	\$46	\$40	\$34	\$0	\$36	\$2,780	\$2,559	\$315	\$8,199	
Energy Star® HVAC	\$14,460	\$11,412	\$5,739	\$61	\$30	\$82	\$41	\$40	\$4	(\$8)	(\$9)	\$20	\$17	\$6	\$0	\$153	\$640	\$4,151	\$445	\$3,049	
EnergyWise Multifamily	\$8,827	\$6,395	\$1,284	\$14	\$10	\$22	\$13	\$12	\$1	\$1	\$1	\$7	\$6	\$4	\$0	\$37	\$3,975	\$910	\$98	\$2,431	
Home Energy Reports	\$2,193	\$1,715	\$726	\$25	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$899	\$64	\$478	
Residential New Construction	\$1,437	\$1,288	\$743	\$7	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$3	\$0	\$479	\$56	\$148	
Non-Income Eligible Residential SUBTOTAL	\$45,545	\$31,240	\$12,665	\$141	\$98	\$206	\$129	\$126	\$10	\$38	\$43	\$73	\$63	\$43	\$0	\$230	\$7,396	\$8,999	\$980	\$14,305	
Income Eligible Residential																					
Single Family - Income Eligible Services	\$17,864	\$11,971	\$1,773	\$17	\$23	\$46	\$31	\$30	\$2	\$27	\$32	\$18	\$16	\$22	\$0	\$0	\$8,591	\$1,208	\$134	\$5,893	
Low Income Multifamily	\$12,914	\$8,250	\$2,757	\$23	\$6	\$13	\$8	\$8	\$1	\$1	\$0	\$5	\$4	\$2	\$0	\$50	\$3,483	\$1,679	\$207	\$4,665	
Income Eligible Residential SUBTOTAL	\$30,778	\$20,221	\$4,530	\$40	\$30	\$60	\$39	\$38	\$3	\$28	\$32	\$23	\$20	\$24	\$0	\$50	\$12,074	\$2,887	\$342	\$10,557	
Commercial & Industrial																					
Large Commercial New Construction	\$13,142	\$9,401	\$3,192	\$35	\$0	\$0	\$0	\$0	\$0	\$1	\$1	\$0	\$0	\$1	\$0	\$7	\$3,037	\$2,818	\$311	\$3,741	
Large Commercial Retrofit	\$49,145	\$36,359	\$11,477	\$272	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$36	\$12,154	\$11,367	\$1,053	\$12,787	
Small Business Direct Install	\$1,674	\$1,091	\$375	\$7	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$301	\$0	\$373	\$35	\$582	
Commercial & Industrial Multifamily	\$5,216	\$3,414	\$1,163	\$15	\$7	\$14	\$9	\$9	\$1	\$1	\$1	\$5	\$4	\$2	\$0	\$13	\$1,120	\$951	\$101	\$1,802	
Commercial & Industrial SUBTOTAL	\$69,177	\$50,266	\$16,206	\$329	\$7	\$14	\$9	\$9	\$1	\$2	\$1	\$5	\$4	\$3	\$0	\$356	\$16,311	\$15,508	\$1,500	\$18,911	
Grand Total	\$145,500	\$101,726	\$33,401	\$511	\$135	\$280	\$177	\$173	\$14	\$68	\$77	\$101	\$87	\$70	\$0	\$636	\$35,780	\$27,394	\$2,821	\$43,774	

Attachment PUC 5-1-3
National Grid
Electric Comparison of 2021 Benefits between AESC 2021 Study Values and AESC 2018 Values

	Total		Benefits (000's)																
			Capacity					Energy					Non-Electric				Societal		
			Total (Economic Excluded)	Summer Generation	Capacity DRIPE	Trans	Dist	Reliability	Winter Peak	Winter Off Peak	Summer Peak	Summer Off Peak	Electric Energy DRIPE	Natural Gas	Oil	Other Resource	Non Resource	Carbon	NOx
Non-Income Eligible Residential																			
Residential New Construction	\$730	\$730	-\$31	\$35	-\$9	\$2	\$0	\$31	\$93	-\$4	\$11	-\$27	\$0	-\$5	\$191	\$0	\$449	-\$6	\$0
ENERGY STAR® HVAC	\$1,062	\$1,062	-\$111	\$135	-\$33	\$6	\$1	\$85	\$243	\$2	\$16	-\$41	-\$64	-\$1	-\$2	\$1	\$862	-\$37	\$0
EnergyWise	\$1,199	\$1,199	-\$112	\$97	-\$34	\$7	\$1	\$1	\$19	-\$8	\$10	-\$159	\$0	-\$167	\$24	\$4	\$1,347	\$169	\$0
EnergyWise Multifamily	\$99	\$99	-\$74	\$70	-\$21	\$4	\$0	\$3	\$8	-\$1	\$9	-\$39	\$0	-\$12	-\$1	\$8	\$138	\$8	\$0
Home Energy Reports	-\$482	-\$482	-\$44	-\$836	-\$39	\$7	-\$4	-\$46	-\$28	-\$65	-\$30	-\$279	\$0	\$0	\$0	\$0	\$896	-\$15	\$0
ENERGY STAR® Lighting	-\$238	-\$238	-\$97	-\$240	-\$45	\$8	\$0	-\$13	\$18	-\$44	-\$6	-\$400	\$37	\$7	-\$22	\$0	\$585	-\$27	\$0
Residential Consumer Products	\$710	\$710	-\$197	\$641	-\$70	\$13	\$3	-\$31	\$8	-\$52	-\$8	-\$604	-\$2	-\$1	\$0	\$0	\$1,031	-\$23	\$0
Non-Income Eligible Residential SUBTOTAL	\$3,080	\$3,080	-\$666	-\$98	-\$252	\$47	\$1	\$30	\$361	-\$172	\$1	-\$1,547	-\$28	-\$178	\$192	\$12	\$5,308	\$69	\$0
Income Eligible Residential																			
Single Family - Income Eligible Services	\$1,150	\$1,150	-\$190	\$209	-\$56	\$11	\$1	\$45	\$119	\$0	\$39	-\$145	-\$22	-\$85	-\$1	\$39	\$1,118	\$67	\$0
Income Eligible Multifamily	\$96	\$96	-\$19	\$14	-\$6	\$1	\$0	\$2	\$7	-\$1	\$2	-\$22	\$0	-\$11	-\$1	\$4	\$115	\$9	\$0
Income Eligible Residential SUBTOTAL	\$1,246	\$1,246	-\$209	\$224	-\$62	\$12	\$1	\$47	\$127	-\$1	\$42	-\$167	-\$22	-\$96	-\$3	\$44	\$1,233	\$76	\$0
Commercial & Industrial																			
Large Commercial New Construction	\$2,513	\$2,513	-\$1,115	\$1,231	-\$320	\$62	\$6	\$207	\$342	\$27	\$228	-\$667	\$32	\$0	\$0	\$7	\$2,606	-\$133	\$0
Large Commercial Retrofit	\$12,235	\$12,235	-\$4,531	\$7,602	-\$1,414	\$272	\$39	\$340	\$1,388	-\$218	\$549	-\$3,279	\$587	\$0	-\$6	\$102	\$11,394	-\$591	\$0
Small Business Direct Install	\$1,621	\$1,621	-\$400	\$752	-\$127	\$24	\$4	\$3	\$78	-\$78	\$44	-\$613	\$72	\$0	\$0	\$11	\$1,921	-\$73	\$0
C&I SUBTOTAL	\$16,368	\$16,368	-\$6,047	\$9,585	-\$1,860	\$359	\$49	\$550	\$1,808	-\$268	\$821	-\$4,559	\$691	\$0	-\$6	\$120	\$15,922	-\$797	\$0
TOTAL	\$20,694	\$20,694	-\$6,921	\$9,711	-\$2,174	\$418	\$51	\$627	\$2,296	-\$441	\$864	-\$6,274	\$641	-\$275	\$183	\$176	\$22,463	-\$652	\$0

Attachment PUC 5-1-4
National Grid
Gas Comparison of 2021 Benefits between AESC 2021 Study Values and AESC 2018 Values

Total	Total (Economic Excluded)	Benefits (000's)																		
		Natural Gas Benefits		Electric Capacity				Electric Energy				Non-Electric and Non-Gas			Societal Benefits					
		Natural Gas	Natural Gas DRIPE	Summer Generation	Capacity DRIPE (1)	Transmission	Distribution	Reliability	Winter		Summer		Electric Energy DRIPE	Oil	Other-Resource	Non-Resource	Carbon Benefits	Nox	Economic	
							Peak	Off Peak	Peak	Off Peak										
Non-Income Eligible Residential																				
EnergyWise	\$278	\$278	(\$424)	(\$35)	(\$20)	\$103	(\$8)	\$2	\$2	\$4	\$9	(\$1)	\$4	(\$6)	\$0	(\$1)	\$11	\$590	\$49	\$0
Energy Star® HVAC	\$845	\$845	(\$671)	(\$62)	(\$6)	\$81	(\$4)	\$1	\$1	(\$1)	(\$1)	\$0	\$2	(\$4)	\$0	(\$5)	\$2	\$1,439	\$72	\$0
EnergyWise Multifamily	\$196	\$196	(\$140)	(\$14)	(\$2)	\$22	(\$1)	\$0	\$0	\$0	\$0	\$0	\$1	(\$1)	\$0	(\$1)	\$14	\$303	\$16	\$0
Home Energy Reports	\$368	\$368	(\$134)	(\$17)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$508	\$10	\$0
Residential New Construction	\$59	\$59	(\$79)	(\$7)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$0)	\$0	\$136	\$9	\$0
Non-Income Eligible Residential SUBTOTAL	\$1,745	\$1,745	(\$1,447)	(\$135)	(\$28)	\$205	(\$14)	\$3	\$3	\$3	\$8	(\$0)	\$6	(\$12)	\$0	(\$7)	\$27	\$2,977	\$156	\$0
Income Eligible Residential																				
Single Family - Income Eligible Services	\$266	\$266	(\$179)	(\$17)	(\$7)	\$46	(\$3)	\$1	\$1	\$2	\$5	\$0	\$2	(\$3)	\$0	\$0	\$33	\$364	\$21	\$0
Low Income Multifamily	\$164	\$164	(\$280)	(\$24)	(\$2)	\$13	(\$1)	\$0	\$0	\$0	\$0	\$0	\$0	(\$1)	\$0	(\$2)	\$13	\$412	\$33	\$0
Income Eligible Residential SUBTOTAL	\$430	\$430	(\$459)	(\$41)	(\$9)	\$60	(\$4)	\$1	\$1	\$2	\$5	\$0	\$2	(\$4)	\$0	(\$2)	\$47	\$776	\$54	\$0
Commercial & Industrial																				
Large Commercial New Construction	\$720	\$720	(\$351)	(\$32)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$0)	\$12	\$1,043	\$48	\$0
Large Commercial Retrofit	\$4,368	\$4,368	(\$972)	(\$239)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$1)	\$46	\$5,370	\$164	\$0
Small Business Direct Install	\$134	\$134	(\$29)	(\$6)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$9)	\$0	\$172	\$5	\$0
Commercial & Industrial Multifamily	\$293	\$293	(\$92)	(\$15)	(\$2)	\$14	(\$1)	\$0	\$0	\$0	\$0	\$0	\$0	(\$1)	\$0	(\$0)	\$4	\$369	\$16	\$0
Commercial & Industrial SUBTOTAL	\$5,514	\$5,514	(\$1,444)	(\$292)	(\$2)	\$14	(\$1)	\$0	\$0	\$0	\$0	\$0	\$0	(\$1)	\$0	(\$11)	\$62	\$6,954	\$233	\$0
Grand Total	\$7,689	\$7,689	(\$3,350)	(\$468)	(\$39)	\$279	(\$19)	\$4	\$4	\$5	\$13	\$1	\$9	(\$16)	\$0	(\$20)	\$136	\$10,707	\$443	\$0

(1) This reflects an update to the way the Company calculates uncleared capacity DRIPE.

PUC 5-2

Request:

Referencing the Company's response to DIV 2-10 in which the Company represented that:

The Company believes the proposed measure mix offers the ideal reallocation of funds. In general, the Company sought to plan for incremental savings and benefits in programs where it anticipated incremental savings would be achievable on the basis of additional budget made available through the reallocation of funds originally allocated to the RI Grows, LLC project, with a goal of maximizing customer net benefits.

and the Company's response to other data requests, including PUC 3-2 and 3-3, along with the testimony of Company witnesses on December 6 and 8, 2021, please indicate whether the Company has changed its opinion that the reallocation in the Provisional Plan is the "ideal" reallocation of funds and maximizes customers net benefits.

If the Company has changed its opinion, please provide its ideal reallocation of some or all of the \$9M that would maximize customers net benefits and PIM eligible benefits (if different, please provide both). Please provide all schedules necessary to evaluate this reallocation.

Response:

Given where the Company believes incremental savings to be available and achievable in 2022, the incentive and other costs that the Company believes will be required to achieve incremental savings, and the incremental delivery capability (and potential for realization of savings and benefits in future years, beyond those that will be claimed and claimable in 2022) that will be enabled by specific investments proposed in the Company's re-allocation, the Company continues to believe that the Provisional Plan remains the ideal reallocation of the \$9M.

Specifically:

- Re-allocating these dollars outside of the commercial and industrial (C&I) programs (to either the market rate or income-eligible residential programs) would likely lead to the realization of an even greater reduction in PIM eligible net benefits relative to not re-allocating those \$9mln, given the typically higher cost to achieve savings and benefits from these sectors relative to the C&I sector.
- Within the C&I sector, the Company believes that the proposed programmatic re-allocation of dollars represents an appropriate balance between achieving the least cost incremental savings where they are likely to be achievable, investing in areas that are consistent with identified stakeholder priorities, and investing in areas that are

likely to produce additional savings and benefits in future years (even if those savings and associated benefits will not be realized or claimable in 2022).

Ultimately, while the Company acknowledges that the proposed incremental spend in the current Provisional Plan results in increased average cost to achieve and leads to a reduction in planned PIM-eligible net benefits, the Company continues to believe that this re-allocation will provide the best long-term outcome for customers for the following reasons:

- **Total Benefits:** Total benefits increase under the proposed re-allocation. These include non-energy benefits, such as CO₂ emissions reductions, which contribute to the targets set forth in the 2021 Act on Climate, as well as reduced maintenance costs, water consumption, and fuel usage.
- **Program Development:** Second, as discussed during the hearing and itemized in RR-2, approximately \$1.8M of the proposed spend would primarily contribute to program capacity building that will contribute significant savings in future years.
- **Incentives to Manage Costs:** Third, the Company notes that all of these calculations are speculative, based on assumptions the Company has made with the best information currently available, but come with an inherent, significant degree of uncertainty. Consistent with both the Company's obligation to customers, and as incentivized by the current PIM structure, the Company always seeks to achieve the maximum savings at the lowest cost possible. To the extent that smaller increases in planned incentive costs will be required to achieve the planned (or greater) level of savings and benefits accounted for in the provisional plan, the Company has every incentive to pursue these savings at lower cost. And, to the extent that realizing these savings would require even greater costs, existing mechanisms within the Plan (both budgetary controls as well as the PIM mechanism) will both protect customers against this eventuality as well as hold the Company accountable for this outcome.

PUC 5-3

Request:

Please remove any measures from the reallocated \$9M in the Provisional Plan that do not have a BCR over 1.0 (excluding economic benefits). Include any spending that is critically linked to any measures above 1.0, describe the critical linkage. Please provide two sets of schedules showing the remaining spending. One set should only include the reallocated spending with a BCR of over 1.0 (without economic benefits) and include schedules E-2, E-5, E-5 Secondary, E-5A, E-6, E-6A, E-6B, and E-8A (similar to the Company’s response to PUC 1-20). The second set should be a full set of schedules consisting of the reallocated spending from this response with the Alternative Base Plan spending (these schedules will be called the Provisional Plan 2).

Response:

Please find attached to this response the “Provisional Plan 2” Attachment 5 tables which includes a full set of schedules consisting of the reallocated spending from this response with the Alternative Base Plan spending. The Provisional Plan 2 tables remove those incremental measures identified in RR-1 that do not have a BCR over 1.0 (excluding economic benefits). Please see below the spending that is critically linked to the remaining incremental measures with a BCR above 1.0.

Please also see updated schedules E-2, E-5, E-5 Secondary, E-5A, E-6, E-6A, E-6B, and E-8A attached to this data request (collectively labeled as Attachment PUC 5-3-1)

Non-incentive spending that is critically linked to any measures above 1.0 is shown in the table below.

Amt	Item	Program
\$200,000	Early retirements (Energy Solutions)	Large Commercial New Construction
\$47,550	Additional Sales & Technical Services	Large Commercial New Construction
\$110,950	Additional Sales & Technical Services	Large Commercial Retrofit

HVAC Early Retirements will be captured as HVAC retrofits. The Company also included \$317,000 for additional sales & technical services in the Provisional Plan. While this amount will partly support future portfolio growth, it will also support incremental growth in 2022 program activity due to a moderate increase in program volume. For purposes of this analysis, the Company has assumed that 50% of this amount is necessary to support current-year savings, while the remainder contributes to future-year savings.

Please note two additional items for Attachment PUC 5-3-1:

- 1) This comparison assumes that the budget correction to the Non-Income Eligible Residential electric sector as detailed in the November 5th cover letter to the PUC is applied in both the Provisional Plan 2 and the Alternate Base Plan.
- 2) This comparison assumes a lower EERMC and OER budget than what was provided in the "Alternate Base Plan". The Alternate Base Plan as provided only removed the RI Grows CHP project but did not update the associated EERMC and OER budgets to account for the overall lower collections and customer funding requirements. This response accounts for the corresponding update to OER and EERMC budgets.

**Table E-1 - PROVISIONAL PLAN 2
National Grid
Electric DSM Funding Sources in 2022 by Sector
\$(000)**

	Income Eligible Residential	Projections by Sector Non-Income Eligible Residential	Commercial & Industrial	Total
(1) Projected Budget (from E-2):	\$17,075.4	\$36,162.0	\$63,895.8	\$117,133.3
Sources of Other Funding:				
(2) Projected DSM Commitments at Year-End 2021:	\$0.0	\$0.0	\$0.0	\$0.0
(3) Projected Year-End 2021 Fund Balance and Interest:	\$0.0	(\$7,628.9)	\$12,579.2	\$4,950.3
(4) Projected FCM Net Revenue from ISO-NE:	\$482.0	\$5,723.2	\$8,130.1	\$14,335.3
(5) Total Other Funding:	\$482.0	(\$1,905.7)	\$20,709.3	\$19,285.5
(6) Customer Funding Required:	\$16,593.4	\$38,067.7	\$43,186.6	\$97,847.8
(7) Forecasted kWh Sales:	246,778,762	2,930,118,727	4,162,361,309	7,339,258,798
(8) Energy Efficiency Program charge per kWh, excluding uncollectible recovery:				\$0.01333
(9) Proposed SRP Opex Factor per kWh, excluding uncollectible recovery:				<u>\$0.00000</u>
(10) Total Proposed Energy Efficiency Charge per kWh, excluding uncollectible recovery:				\$0.01333
(11) Currently Effective Uncollectible Rate				1.30%
(12) Proposed Energy Efficiency Program Charge per kWh, including Uncollectible Recovery:				\$0.01350
(13) Currently Effective Energy Efficiency Program Charge per kwh				<u>\$0.01113</u>
(14) Proposed Adjustment to Reflect Fully Reconciling Funding Mechanism				\$0.00237

Notes:

- (1) Projected Budget from E-2 includes OER and EERMC costs allocated to each sector based on forecasted sales.
- (2) DSM Commitments are projects that are under construction with anticipated completion in 2022.
- (3) Fund balance projections include projected revenue and spend through year end with Income Eligible sector set to \$0 through projected subsidization from other sectors, minus commitments which are illustrated separately on line (2). The Company proposes to refile this table with updated Fund Balance projections on November 17, 2021 as proposed in Section 10 of the Plan's Main Text.
- (4) The total projection of FCM revenue is allocated by kWh sales to each sector. FCM Revenue includes an estimated \$250,230 penalty. See prefiled testimony for additional details.
- (5) Line (2) + Line (3) + Line (4)
- (6) Line (1) - Line (5)
- (7) Per Company Forecast
- (8) Line (6) ÷ Line (7), truncated to 5 decimal places
- (9) Truncated to 5 decimal places
- (11) Proposed SRP Opex Factor is \$0.00000.
- (10) Line (8) + Line (9)
- (11) Uncollectible rate approved in Docket No 4770.
- (12) Line (10) ÷ (1-Line (11), truncated to 5 decimal places
- (13) Currently Effective EE Charge includes System Reliability Factor and uncollectible recovery.
- (14) Line (12) - Line (13)

**Table E-2 - PROVISIONAL PLAN 2
National Grid
2022 Electric Energy Efficiency Program Budget (\$000)**

	Program Planning & Administration	Marketing	Cost of services and product rebates/incentives provided to customers	Sales, Technical Assistance & Training	Evaluation & Market Research	Total Performance Incentive	Grand Total
Non-Income Eligible Residential							
Residential New Construction	\$92.2	\$23.6	\$800.9	\$504.2	\$79.9		\$1,500.8
ENERGY STAR® HVAC	\$102.4	\$279.6	\$3,734.7	\$486.0	\$262.3		\$4,865.0
EnergyWise	\$410.9	\$373.6	\$13,289.6	\$1,316.0	\$282.0		\$15,672.1
EnergyWise Multifamily	\$102.3	\$74.3	\$2,613.8	\$407.1	\$40.4		\$3,238.0
Residential Consumer Products	\$84.7	\$464.3	\$1,724.7	\$500.8	\$22.2		\$2,796.7
Home Energy Reports	\$55.9	\$13.1	\$0.0	\$2,551.5	\$20.8		\$2,641.3
Residential ConnectedSolutions	\$39.0	\$11.3	\$1,356.1	\$368.5	\$37.4		\$1,812.3
Energy Efficiency Education Programs	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0		\$0.0
Residential Pilots	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0		\$0.0
Community Based Initiatives - Residential	\$33.7	\$125.2	\$96.2	\$0.0	\$0.0		\$255.1
Comprehensive Marketing - Residential	\$1.3	\$246.7	\$0.0	\$0.0	\$0.0		\$247.9
Residential Performance Incentive	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Subtotal - Non-Income Eligible Residential	\$922.5	\$1,611.8	\$23,615.9	\$6,134.0	\$744.9	\$0.0	\$33,029.2
Income Eligible Residential							
Single Family - Income Eligible Services	\$343.5	\$135.0	\$10,756.0	\$1,966.5	\$72.5		\$13,273.5
Income Eligible Multifamily	\$115.9	\$14.1	\$3,024.0	\$344.2	\$39.8		\$3,538.1
Income Eligible Performance Incentive	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Subtotal - Income Eligible Residential	\$459.4	\$149.2	\$13,780.0	\$2,310.7	\$112.3	\$0.0	\$16,811.6
Commercial & Industrial							
Large Commercial New Construction	\$229.0	\$306.8	\$9,260.1	\$1,791.9	\$432.9		\$12,020.6
Large Commercial Retrofit	\$757.5	\$239.5	\$19,566.9	\$4,934.54	\$816.3		\$26,314.7
Small Business Direct Install	\$231.7	\$244.0	\$7,937.2	\$308.7	\$256.0		\$8,977.6
Commercial ConnectedSolutions	\$99.0	\$6.8	\$4,102.6	\$181.8	\$0.0		\$4,390.2
Commercial Pilots	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0		\$0.0
Community Based Initiatives - C&I	\$11.2	\$41.7	\$32.1	\$0.0	\$0.0		\$85.0
Finance Costs	\$0.0	\$0.0	\$2,000.0	\$0.0	\$0.0		\$2,000.0
Commercial Workforce Development	\$0.0	\$0.0	\$0.0	\$157.5	\$0.0		\$157.5
Commercial & Industrial Performance Incentive	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$5,500.0	\$5,500.0
Subtotal - Commercial & Industrial	\$1,328.3	\$838.8	\$42,898.9	\$7,374.4	\$1,505.2	\$5,500.0	\$59,445.6
Regulatory							
OER	\$1,708.2	\$0.0	\$0.0	\$0.0	\$0.0		\$1,708.2
EERMC	\$1,138.8	\$0.0	\$0.0	\$0.0	\$0.0		\$1,138.8
Rhode Island Infrastructure Bank	\$0.0	\$0.0	\$5,000.0	\$0.0	\$0.0		\$5,000.0
Subtotal - Regulatory	\$2,846.9	\$0.0	\$5,000.0	\$0.0	\$0.0	\$0.0	\$7,846.9
Grand Total	\$5,557.1	\$2,599.8	\$85,294.8	\$15,819.2	\$2,362.3	\$5,500.0	\$117,133.3

Notes:

- (1) 2022 Large Commercial Retrofit Commitments (\$000):
- (2) For more information on Finance Costs, please refer to Attachment 2, Section 9.
- (3) OER and EERMC total 3.0% of customers' EE Program Charge collected on Table E-1, minus 3%.
- (4) Finance Costs are detailed in Table E-9. Finance Costs include an injection of \$2M into the Large C&I Revolving Loan Fund. Without this injection the Large C&I Revolving Loan Fund is projected to be negative by the end of 2022.
- (5) Demonstrations and Assessments budgets are included in specific program level budgets listed above. More information on Demonstration and Assessments descriptions, budgets, and which program level budget they are included in can be found in Attachment 8.
- (6) Based on the state's System Reliability and Least Cost procurement statute (amended in 2021), funds transferred to the Rhode Island Infrastructure Bank are now classified under Regulatory costs.

Table E-3 - PROVISIONAL PLAN 2
National Grid
Derivation of the 2022 Spending and Implementation Budgets (\$000)

	Proposed 2022 Budget From E-2	Commitments	Regulatory Costs	Performance Incentive	Eligible Sector Spending Budget for Performance Incentive on E-8B	Implementation Expenses for Cost- Effectiveness on E-5
Non-Income Eligible Residential						
Residential New Construction	\$1,500.8					\$1,500.8
ENERGY STAR@ HVAC	\$4,865.0					\$4,865.0
EnergyWise	\$15,672.1					\$15,672.1
EnergyWise Multifamily	\$3,238.0					\$3,238.0
Residential Consumer Products	\$2,796.7					\$2,796.7
Home Energy Reports	\$2,641.3					\$2,641.3
Residential ConnectedSolutions	\$1,812.3					\$1,812.3
Energy Efficiency Education Programs	\$0.0					\$0.0
Residential Pilots	\$0.0					\$0.0
Community Based Initiatives - Residential	\$255.1					\$255.1
Comprehensive Marketing - Residential	\$247.9					\$247.9
Residential Performance Incentive	\$0.0			\$0.0		\$0.0
Subtotal - Non-Income Eligible Residential	\$33,029.2	\$0.0	\$0.0	\$0.0	\$31,192.0	\$33,029.2
Income Eligible Residential						
Single Family - Income Eligible Services	\$13,273.5					\$13,273.5
Income Eligible Multifamily	\$3,538.1					\$3,538.1
Income Eligible Performance Incentive	\$0.0			\$0.0		\$0.0
Subtotal - Income Eligible Residential	\$16,811.6	\$0.0	\$0.0	\$0.0	\$16,811.6	\$16,811.6
Commercial & Industrial						
Large Commercial New Construction	\$12,020.6	\$0.0				\$12,020.6
Large Commercial Retrofit	\$26,314.7	\$0.0				\$26,314.7
Small Business Direct Install	\$8,977.6	\$0.0				\$8,977.6
Commercial ConnectedSolutions	\$4,390.2					\$4,390.2
Commercial Pilots	\$0.0					\$0.0
Community Based Initiatives - C&I	\$85.0					\$85.0
Finance Costs	\$2,000.0					\$2,000.0
Commercial Workforce Development	\$157.5					\$157.5
Commercial & Industrial Performance Incentive	\$5,500.0			\$5,500.0		\$0.0
Subtotal - Commercial & Industrial	\$59,445.6	\$0.0	\$0.0	\$5,500.0	\$49,524.3	\$53,945.6
Regulatory						
OER	\$1,708.2		\$1,708.2			\$1,708.2
EERMC	\$1,138.8		\$1,138.8			\$1,138.8
Rhode Island Infrastructure Bank	\$5,000.0		\$5,000.0			\$5,000.0
Subtotal - Regulatory	\$7,846.9	\$0.0	\$7,846.9	\$0.0	\$0.0	\$7,846.9
Grand Total	\$117,133.3	\$0.0	\$7,846.9	\$5,500.0	\$97,527.9	\$111,633.3

Notes:

- (1) Eligible Sector Spending Budget = Total Budget from E-2 minus commitments, regulatory costs, pilots, assessments, Residential ConnectedSolutions, Commercial ConnectedSolutions, Performance Incentive
- (2) Eligible Sector Spending Budget does not include assessments, see Attachment 8 for assessments budgets.
- (3) Implementation Expenses = Total Budget from E-2 minus commitments and Performance Incentive.

**Table E-4 - PROVISIONAL PLAN 2
National Grid
Proposed 2022 Budget Compared to Approved 2021 Budget (\$000)**

	Proposed Implementation Budget 2022	Approved Implementation Budget 2021	Difference
Non-Income Eligible Residential			
Residential New Construction	\$1,500.8	\$1,611.3	-\$110.6
ENERGY STAR® HVAC	\$4,865.0	\$3,487.8	\$1,377.2
EnergyWise	\$15,672.1	\$15,692.2	-\$20.0
EnergyWise Multifamily	\$3,238.0	\$2,804.3	\$433.7
ENERGY STAR® Lighting	\$0.0	\$5,274.8	-\$5,274.8
Residential Consumer Products	\$2,796.7	\$2,681.2	\$115.5
Home Energy Reports	\$2,641.3	\$2,641.7	-\$0.4
Residential ConnectedSolutions	\$1,812.3	\$1,920.5	-\$108.2
Energy Efficiency Education Programs	\$0.0	\$40.0	-\$40.0
Residential Pilots	\$0.0	\$0.0	\$0.0
Community Based Initiatives - Residential	\$255.1	\$226.2	\$28.9
Comprehensive Marketing - Residential	\$247.9	\$332.7	-\$84.8
Subtotal - Non-Income Eligible Residential	\$33,029.2	\$36,712.7	-\$3,683.4
Income Eligible Residential			
Single Family - Income Eligible Services	\$13,273.5	\$12,846.1	\$427.4
Income Eligible Multifamily	\$3,538.1	\$3,549.0	-\$10.9
Subtotal - Income Eligible Residential	\$16,811.6	\$16,395.1	\$416.5
Commercial & Industrial			
Large Commercial New Construction	\$12,020.6	\$8,188.2	\$3,832.4
Large Commercial Retrofit	\$26,314.7	\$31,565.2	-\$5,250.5
Small Business Direct Install	\$8,977.6	\$8,883.6	\$94.0
Commercial ConnectedSolutions	\$4,390.2	\$2,990.1	\$1,400.1
Community Based Initiatives - C&I	\$85.0	\$74.5	\$10.4
Commercial Pilots	\$0.0	\$0.0	\$0.0
Finance Costs	\$2,000.0	\$5,000.0	-\$3,000.0
Commercial Workforce Development	\$157.5	\$0.0	\$157.5
Subtotal Commercial & Industrial	\$53,945.6	\$56,701.6	-\$2,756.0
Regulatory			
EERMC	\$1,138.8	\$738.5	\$400.3
OER	\$1,708.2	\$738.5	\$969.6
Rhode Island Infrastructure Bank	\$5,000.0	\$0.0	\$5,000.0
Subtotal Regulatory	\$7,846.9	\$1,477.0	\$6,369.9
TOTAL IMPLEMENTATION BUDGET	\$111,633.3	\$111,286.3	\$347.0
OTHER EXPENSE ITEMS			
Commitments	\$0.0	\$0.0	\$0.0
Company Incentive	\$5,500.0	\$5,500.0	\$0.0
Subtotal - Other Expense Items	\$5,500.0	\$5,500.0	\$0.0
TOTAL BUDGET	\$117,133.3	\$116,786.3	\$347.0

Notes:

- (1) Program Implementation Budget excludes Commitments, Company Incentive; derived on Table E-3
- (2) Total Budget includes Implementation, Commitments; illustrated on Table E-3
- (3) The Energy Star® Lighting program year-over-year decrease is due to the phase out of the program in 2022.
- (4) The increased budget for the Large Commercial and Industrial New Construction program can be attributed to a roughly \$3,800,000 increase in incentives for HVAC, controls, industrial process, and other non-lighting measures, plus associated program administration costs to implement a more complex measure mix.
- (5) The Large Commercial Retrofit program decreased primarily due to roughly a \$2,600,000 reduction in lighting incentives due to lower anticipated volume as the market becomes increasingly saturated. The CHP budget also decreased approximately \$500,000 because there was a CHP retrofit in the 2021 plan. This has been partially offset by increased non-lighting incentive budgets and associated program administration costs to implement a more complex measure mix.
- (6) The increase in the 2022 Commercial and Industrial ConnectedSolutions program budget can be attributed to the higher participation in the Daily Dispatch demand response offering. In total, the customer incentive payments represent approximately 98% of the cost associated with this measure.
- (7) The Finance Cost decline is driven by a reallocation of \$5M in RIIB from this line to the RIIB line under regulatory due to the updated the Least Cost Procurement statute (amended in 2021).
- (8) The increase in allocation of funds to the OER is made consistent with the state's System Reliability and Least Cost procurement statute (amended in 2021), which provides that the Commission shall allocate an amount not to exceed three percent (3.0%) from authorized demand-side management gas and electric funds authorized.
- (9) The Rhode Island Infrastructure Bank addition is driven by a reallocation of \$5M in RIIB from the Finance Cost Line to the Rhode Island Infrastructure Bank line under the regulatory sector to comply with the Least Cost Procurement statute (amended in 2021).

**Table E-5 - Primary - PROVISIONAL PLAN 2
National Grid
Calculation of 2022 Program Year Cost-Effectiveness
All Dollar Values in (\$000)**

	RI Test Benefit/ Cost¹	Total Benefit	Program Implementation Expenses²	Customer Contribution	Performance Incentive	¢/Lifetime kWh
Non-Income Eligible Residential						
Residential New Construction	2.07	\$4,232.1	\$1,500.8	\$547.2		13.7
ENERGY STAR® HVAC	2.18	\$14,630.8	\$4,865.0	\$1,848.5		8.6
EnergyWise	1.03	\$16,626.6	\$15,672.1	\$530.6		120.3
EnergyWise Multifamily	1.64	\$6,189.9	\$3,238.0	\$532.0		18.1
Home Energy Reports	2.04	\$5,401.4	\$2,641.3	\$0.0		9.8
Residential Consumer Products	2.21	\$9,713.3	\$2,796.7	\$1,606.6		9.3
Residential ConnectedSolutions	1.59	\$2,886.0	\$1,812.3	\$0.0		N/A
Energy Efficiency Education Programs			\$0.0			
Residential Pilots			\$0.0			
Community Based Initiatives - Residential			\$255.1			
Comprehensive Marketing - Residential			\$247.9			
Non-Income Eligible Residential SUBTOTAL	1.57	\$59,680.0	\$33,029.2	\$5,064.9	\$0.0	18.9
Income Eligible Residential						
Single Family - Income Eligible Services	1.94	\$25,758.0	\$13,273.5	\$0.0		34.5
Income Eligible Multifamily	2.37	\$8,368.1	\$3,538.1	\$0.0		14.6
Income Eligible Residential SUBTOTAL	2.03	\$34,126.2	\$16,811.6	\$0.0	\$0.0	26.8
Commercial & Industrial						
Large Commercial New Construction	2.98	\$38,894.8	\$12,020.6	\$1,023.3		6.0
Large Commercial Retrofit	2.16	\$75,665.9	\$26,314.7	\$8,672.3		10.8
Small Business Direct Install	1.16	\$12,596.2	\$8,977.6	\$1,923.1		16.9
Commercial ConnectedSolutions	2.42	\$10,621.2	\$4,390.2	\$0.0		N/A
Commercial Pilots			\$0.0			
Community Based Initiatives - C&I			\$85.0			
Finance Costs			\$2,000.0			
Commercial Workforce Development			\$157.5			
C&I SUBTOTAL	1.94	\$137,778.1	\$53,945.6	\$11,618.8	\$5,500.0	10.8
Regulatory						
OER			\$1,708.2			
EERMC			\$1,138.8			
Rhode Island Infrastructure Bank			\$5,000.0			
Regulatory SUBTOTAL			\$7,846.9			
TOTAL	1.73	\$231,584.3	\$111,633.3	\$16,683.6	\$5,500.0	14.7

Notes:

- (1) RI Test B/C Test = Total Benefits from Table E-6A / Program Implementation Expenses from Table E-3
Also includes effects of free-ridership and spillover.
- (2) For Implementation Expenses derivation, see Table E-3.

Table E-5 - Secondary - PROVISIONAL PLAN 2
National Grid
Calculation of 2022 Program Year Cost-Effectiveness with Economic Benefits Included
All Dollar Values in (\$000)

	RI Test Benefit/ Cost ¹	Total Benefit	Program Implementation Expenses ²	Customer Contribution	Performance Incentive	¢/Lifetime kWh
Non-Income Eligible Residential						
Residential New Construction	3.09	\$6,333.2	\$1,500.8	\$547.2		13.7
ENERGY STAR® HVAC	3.21	\$21,539.0	\$4,865.0	\$1,848.5		8.6
EnergyWise	1.93	\$31,201.6	\$15,672.1	\$530.6		120.3
EnergyWise Multifamily	2.79	\$10,528.8	\$3,238.0	\$532.0		18.1
Home Energy Reports	3.04	\$8,042.7	\$2,641.3	\$0.0		9.8
Residential Consumer Products	3.17	\$13,964.3	\$2,796.7	\$1,606.6		9.3
Residential ConnectedSolutions	2.42	\$4,390.2	\$1,812.3	\$0.0		N/A
Energy Efficiency Education Programs			\$0.0			
Residential Pilots			\$0.0			
Community Based Initiatives - Residential			\$255.1			
Comprehensive Marketing - Residential			\$247.9			
Non-Income Eligible Residential SUBTOTAL	2.52	\$95,999.9	\$33,029.2	\$5,064.9	\$0.0	18.9
Income Eligible Residential						
Single Family - Income Eligible Services	2.80	\$37,173.2	\$13,273.5	\$0.0		34.5
Income Eligible Multifamily	3.56	\$12,578.5	\$3,538.1	\$0.0		14.6
Income Eligible Residential SUBTOTAL	2.96	\$49,751.7	\$16,811.6	\$0.0	\$0.0	26.8
Commercial & Industrial						
Large Commercial New Construction	5.85	\$76,278.9	\$12,020.6	\$1,023.3		6.0
Large Commercial Retrofit	6.53	\$228,291.4	\$26,314.7	\$8,672.3		10.8
Small Business Direct Install	2.78	\$30,282.0	\$8,977.6	\$1,923.1		16.9
Commercial ConnectedSolutions	4.61	\$20,235.7	\$4,390.2	\$0.0		N/A
Commercial Pilots			\$0.0			
Community Based Initiatives - C&I			\$85.0			
Finance Costs			\$2,000.0			
Commercial Workforce Development			\$157.5			
C&I SUBTOTAL	5.00	\$355,088.0	\$53,945.6	\$11,618.8	\$5,500.0	10.8
Regulatory						
OER			\$1,708.2			
EERMC			\$1,138.8			
Rhode Island Infrastructure Bank			\$5,000.0			
Regulatory SUBTOTAL			\$7,846.9			
TOTAL	3.74	\$500,839.6	\$111,633.3	\$16,683.6	\$5,500.0	14.7

Notes:

- (1) RI Test B/C Test = Total Benefits from Table E-6A including Economic Benefits / Program Implementation Expenses from Table E-3
Also includes effects of free-ridership and spillover.
- (2) For Implementation Expenses derivation, see Table E-3.

Table E-5A - PROVISIONAL PLAN 2
National Grid
Calculation of 2022 Program Year Cost-Effectiveness with TRC Test
All Dollar Values in (\$000)

	TRC Benefit/ Cost ¹	Total Benefit	Program Implementation Expenses ²	Customer Contribution	Performance Incentive	¢/Lifetime kWh
Non-Income Eligible Residential						
Residential New Construction	1.65	\$3,371.2	\$1,500.8	\$547.2		13.7
ENERGY STAR® HVAC	1.60	\$10,738.0	\$4,865.0	\$1,848.5		8.6
EnergyWise	0.78	\$12,563.7	\$15,672.1	\$530.6		120.3
EnergyWise Multifamily	1.36	\$5,142.9	\$3,238.0	\$532.0		18.1
Home Energy Reports	1.38	\$3,642.0	\$2,641.3	\$0.0		9.8
Residential Consumer Products	1.59	\$7,013.3	\$2,796.7	\$1,606.6		9.3
Residential ConnectedSolutions	1.59	\$2,882.5	\$1,812.3	\$0.0		N/A
Energy Efficiency Education Programs			\$0.0			0.0
Residential Pilots			\$0.0			0.0
Community Based Initiatives - Residential			\$255.1			0.0
Comprehensive Marketing - Residential			\$247.9			0.0
Non-Income Eligible Residential SUBTOTAL	1.19	\$45,353.5	\$33,029.2	\$5,064.9	\$0.0	18.9
Income Eligible Residential						
Single Family - Income Eligible Services	1.66	\$22,034.6	\$13,273.5	\$0.0		34.5
Income Eligible Multifamily	2.03	\$7,186.3	\$3,538.1	\$0.0		14.6
Income Eligible Residential SUBTOTAL	1.74	\$29,220.8	\$16,811.6	\$0.0	\$0.0	26.8
Commercial & Industrial						
Large Commercial New Construction	2.29	\$29,827.7	\$12,020.6	\$1,023.3		6.0
Large Commercial Retrofit	1.71	\$59,832.7	\$26,314.7	\$8,672.3		10.8
Small Business Direct Install	0.86	\$9,355.6	\$8,977.6	\$1,923.1		16.9
Commercial ConnectedSolutions	2.42	\$10,621.2	\$4,390.2			
Commercial Pilots			\$0.0			
Community Based Initiatives - C&I			\$85.0			
Finance Costs			\$2,000.0			
Commercial Workforce Development			\$157.5			
C&I SUBTOTAL	1.54	\$109,637.2	\$53,945.6	\$11,618.8	\$5,500.0	10.8
Regulatory						
OER			\$1,708.2			
EERMC			\$1,138.8			
Rhode Island Infrastructure Bank			\$5,000.0			
Regulatory SUBTOTAL			\$7,846.9			
TOTAL	1.38	\$184,211.6	\$111,633.3	\$16,683.6	\$5,500.0	14.7

(1) TRC B/C Test omits societal benefits that are monetized in the RI Test, including non-embedded emissions (CO2 and Nox), and economic benefits Also includes effects of free-ridership and spillover.

(2) For Implementation Expenses derivation, see Table E-3.

Table E-6 - PROVISIONAL PLAN 2
National Grid
Summary of 2022 Benefits by Program (Energy Efficiency Measures)

	Benefits (000's)																		
	Total	Total (Economic Excluded)	Capacity					Energy				Non Electric				Societal			
			Summer Generation	Capacity DRIPE	Trans	Dist	Reliability	Winter		Summer		Electric Energy DRIPE	Natural Gas	Oil	Other Resource	Non Resource	Carbon	NOx	Economic
Winter Peak	Winter Off Peak	Summer Peak	Summer Off Peak																
Non-Income Eligible Residential																			
Residential New Construction	\$6,333	\$4,232	\$48	\$43	\$94	\$93	\$1	\$369	\$485	\$144	\$110	\$289	\$0	\$325	\$1,304	\$66	\$833	\$28	\$2,101
ENERGY STAR® HVAC	\$21,539	\$14,631	\$182	\$159	\$357	\$353	\$2	\$2,398	\$2,987	\$221	\$185	\$1,833	\$55	\$1,639	-\$16	\$384	\$3,762	\$131	\$6,908
EnergyWise	\$31,202	\$16,627	\$148	\$162	\$291	\$288	\$2	\$267	\$273	\$178	\$157	\$314	\$0	\$8,984	\$233	\$1,267	\$3,605	\$458	\$14,575
EnergyWise Multifamily	\$10,529	\$6,190	\$94	\$79	\$182	\$180	\$1	\$595	\$742	\$106	\$89	\$464	\$0	\$632	\$48	\$1,931	\$1,004	\$43	\$4,339
Home Energy Reports	\$8,043	\$5,401	\$207	\$450	\$365	\$362	\$6	\$646	\$531	\$251	\$183	\$640	\$0	\$0	\$0	\$0	\$1,736	\$23	\$2,641
Residential Consumer Products	\$13,964	\$9,713	\$335	\$719	\$752	\$745	\$9	\$903	\$981	\$485	\$487	\$1,496	\$15	\$42	\$41	\$4	\$2,663	\$37	\$4,251
Non-Income Eligible Residential SUBTOTAL	\$91,610	\$56,794	\$1,014	\$1,612	\$2,041	\$2,022	\$21	\$5,178	\$5,999	\$1,385	\$1,210	\$5,036	\$70	\$11,622	\$1,609	\$3,652	\$13,603	\$720	\$34,816
Income Eligible Residential																			
Single Family - Income Eligible Services	\$37,173	\$25,758	\$275	\$253	\$541	\$536	\$3	\$874	\$967	\$410	\$423	\$801	\$77	\$5,282	\$386	\$11,208	\$3,428	\$295	\$11,415
Income Eligible Multifamily	\$12,578	\$8,368	\$22	\$19	\$43	\$43	\$0	\$789	\$1,008	\$30	\$25	\$554	\$0	\$642	\$53	\$3,958	\$1,137	\$45	\$4,210
Income Eligible Residential SUBTOTAL	\$49,752	\$34,126	\$297	\$271	\$584	\$578	\$3	\$1,663	\$1,975	\$440	\$448	\$1,354	\$77	\$5,924	\$439	\$15,165	\$4,565	\$340	\$15,626
Commercial & Industrial																			
Large Commercial New Construction	\$76,279	\$38,895	\$1,526	\$1,302	\$2,984	\$2,957	\$16	\$5,671	\$3,324	\$3,596	\$2,177	\$4,804	-\$257	\$0	\$5	\$1,722	\$8,951	\$116	\$37,384
Large Commercial Retrofit	\$228,291	\$75,666	\$2,865	\$5,640	\$6,355	\$6,296	\$71	\$6,837	\$4,956	\$4,659	\$2,944	\$10,240	-\$1,854	\$0	\$38	\$10,783	\$15,755	\$78	\$152,625
Small Business Direct Install	\$30,282	\$12,596	\$248	\$599	\$569	\$564	\$7	\$1,395	\$807	\$1,018	\$519	\$2,089	-\$400	\$0	\$0	\$1,942	\$3,226	\$14	\$17,686
C&I SUBTOTAL	\$334,852	\$127,157	\$4,639	\$7,541	\$9,908	\$9,817	\$94	\$13,903	\$9,088	\$9,273	\$5,640	\$17,133	-\$2,511	\$0	\$43	\$14,447	\$27,933	\$208	\$207,695
TOTAL	\$476,214	\$218,077	\$5,950	\$9,424	\$12,532	\$12,417	\$119	\$20,744	\$17,062	\$11,098	\$7,299	\$23,523	-\$2,364	\$17,547	\$2,092	\$33,265	\$46,101	\$1,268	\$258,137

Table E-6A - PROVISIONAL PLAN 2
National Grid
Summary of 2022 Impacts by Program (Energy Efficiency Measures)

	Load Reduction in kW		Electric Energy Savings				Gas Saved		Oil Saved		Propane Saved		Total Net Savings (Electric, Gas, Oil, Propane)	
			MWh		MMBtu		MMBtu		MMBtu		MMBtu		MMBtu	
	Summer	Winter	Annual	Lifetime	Annual	Lifetime	Annual	Lifetime	Annual	Lifetime	Annual	Lifetime	Annual	Lifetime
Non-Income Eligible Residential														
Residential New Construction	74	259	867	14,947	2,957	50,998	-	-	521	13,016	1,321	33,013	4,798	97,027
ENERGY STAR® HVAC	240	1,063	4,620	77,717	15,762	265,169	395	6,012	4,463	67,405	(33)	(424)	20,587	338,161
EnergyWise	424	506	2,789	13,472	9,515	45,968	-	-	19,019	364,568	230	3,654	28,764	414,190
EnergyWise Multifamily	143	350	1,424	20,783	4,857	70,912	-	-	1,046	25,343	-	-	5,903	96,255
Home Energy Reports	3,692	5,706	26,852	26,852	91,619	91,619	-	-	-	-	-	-	91,619	91,619
Residential Consumer Products	1,118	826	6,885	47,554	23,491	162,256	84	1,672	85	1,683	25	370	23,685	165,981
Non-Income Eligible Residential SUBTOTAL	5,691	8,709	43,435	201,325	148,201	686,921	478	7,684	25,133	472,014	1,543	36,614	175,356	1,203,233
Income Eligible Residential														
Single Family - Income Eligible Services	480	501	3,314	38,506	11,306	131,383	958	11,562	11,178	214,399	63	1,121	23,505	358,466
Income Eligible Multifamily	49	445	1,538	24,309	5,247	82,943	-	-	1,239	25,915	-	-	6,486	108,858
Income Eligible Residential SUBTOTAL	529	946	4,851	62,816	16,553	214,327	958	11,562	12,417	240,314	63	1,121	29,991	467,324
Commercial & Industrial														
Large Commercial New Construction	1,967	1,468	14,155	218,379	48,298	745,109	(2,368)	(30,783)	-	-	-	-	45,930	714,327
Large Commercial Retrofit	8,656	7,349	42,216	325,296	144,041	1,109,911	(34,207)	(223,182)	-	-	-	-	109,833	886,728
Small Business Direct Install	904	722	9,976	64,394	34,037	219,711	(8,030)	(48,183)	-	-	-	-	26,007	171,528
C&I SUBTOTAL	11,527	9,539	66,347	608,069	226,376	2,074,731	(44,606)	(302,147)	-	-	-	-	181,770	1,772,583
TOTAL	17,747	19,194	114,634	872,210	391,130	2,975,979	(43,169)	(282,902)	37,550	712,329	1,607	37,735	387,117	3,443,141

Notes:
1) Lifetime savings are equal to annual savings multiplied by the expected life of measures expected to be installed in each program.

Table E-6B - PROVISIONAL PLAN 2
National Grid
Summary of 2022 Demand Response Benefits and Savings

	Benefits (000's)															Load Reduction (MW)	MWh Saved			
	Total	Total (Economic Excluded)	Summer Generation	Capacity				Energy					Non Electric Resource	Societal					Summer	Annual
				DRIPE	Trans	Dist	Reliability	Winter		Summer		Energy DRIPE		Carbon	Economic					
								Peak	Off Peak	Peak	Off Peak									
Non-Income Eligible Residential																				
Residential Connected	\$4,390	\$2,884	\$238	\$976	\$729	\$722	\$214	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$3	\$1,504	7.4	59.4	59.4	
Commercial & Industrial																				
Commercial Connected	\$20,236	\$10,621	\$646	\$2,651	\$3,207	\$3,177	\$941	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$9,615	32.4	0.0	0.0		
TOTAL	\$24,626	\$13,505	\$884	\$3,627	\$3,936	\$3,899	\$1,154	\$0	\$0	\$0	\$0	\$0	\$0	\$3	\$11,119	39.8	59.4	59.4		

**Table E-7 - PROVISIONAL PLAN 2
National Grid
Comparison of 2022 and 2021 Goals and Tracking**

	Proposed 2022 Goal		Proposed 2022 Tracking				Approved 2021				Difference			
	Lifetime Electric Energy Savings (MWh)	Active Demand Response (kW)	Annual Electric Energy Savings (MWh)	Annual Passive Summer Demand Savings (kW)	Total Net Lifetime Energy Savings (MMBtu)	Planned Unique Participants	Lifetime Electric Energy Savings (MWh)	Annual Electric Energy Savings (MWh)	Annual Passive Summer Demand Savings (kW)	Active Demand Response (kW)	Lifetime Electric Energy Savings (MWh)	Annual Electric Energy Savings (MWh)	Annual Passive Summer Demand Savings (kW)	Active Demand Response (kW)
Non-Income Eligible Residential														
Residential New Construction	14,947		867	74	97,027	462	18,088	979	66		-3,141	-113	8	
ENERGY STAR® HVAC	77,717		4,620	240	338,161	5,229	51,309	3,181	204		26,408	1,439	36	
EnergyWise	13,472		2,789	424	414,190	12,000	14,385	2,841	445		-913	-52	-20	
EnergyWise Multifamily	20,783		1,424	143	96,255	3,600	16,307	1,240	158		4,476	183	-15	
Home Energy Reports	26,852		26,852	3,692	91,619	323,248	26,852	26,852	3,692		0	0	0	
ENERGY STAR® Lighting	0		0	0	0	0	26,801	11,533	1,872		-26,801	-11,533	-1,872	
Residential Consumer Products	47,554		6,885	1,118	165,981	34,692	38,130	5,926	1,019		9,424	958	100	
Residential ConnectedSolutions		7,365				4,178			5,431			0		1,934
Non-Income Eligible Residential SUBTOTAL	201,325	7,365	43,435	5,691	1,203,233	383,409	191,872	52,553	7,455	5,431	9,453	-9,118	-1,764	1,934
Income Eligible Residential														
Single Family - Income Eligible Services	38,506		3,314	480	358,466	3,583	36,909	3,120	457		1,598	194	22	
Income Eligible Multifamily	24,309		1,538	49	108,858	3,600	22,545	1,554	70		1,764	-16	-21	
Income Eligible Residential SUBTOTAL	62,816		4,851	529	467,324	7,183	59,454	4,674	527		3,361	177	2	
Commercial & Industrial														
Large Commercial New Construction	218,379		14,155	1,967	714,327	96	189,441	11,837	1,856		28,939	2,319	111	
Large Commercial Retrofit	325,296		42,216	8,656	886,728	2,239	744,562	59,496	11,648		-419,266	-17,280	-2,992	
Small Business Direct Install	64,394		9,976	904	171,528	490	105,134	9,696	1,134		-40,740	280	-230	
Commercial ConnectedSolutions		32,400				180			33,600					-1,200
C&I SUBTOTAL	608,069	32,400	66,347	11,527	1,772,583	3,005	1,039,136	81,029	14,638	33,600	-431,067	-14,682	-3,111	-1,200
TOTAL	872,210	39,765	114,634	17,747	3,443,141	393,597	1,290,462	138,256	22,621	39,031	-418,252	-23,622	-4,874	734

Notes:
(1) Planned 2022 participation takes into account net-to-gross and estimates unique participation by taking into account 2021 unique customer accounts to savings ratios. Therefore the number of planned measures may be more than the estimated participants shown. For measure counts please view the widget tables in Attachments 1 and 2. Table E-7 no longer includes a comparison to the previous year's participation. Due to the way unique participation is calculated it is not possible to compare year-over-year results.
(2) There are additional Low Income participants in Residential New Construction.
(3) A customer can participate in more than one program, for example, Residential Consumer Products and and Home Energy Reports, therefore the population reached can be more than 100%.

Table E-8A - PROVISIONAL PLAN 2
National Grid
2022 Electric PIM Benefits, Allocations, and Categorization (\$000)

	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)	(13)	(14)	(15)	(16)	(17)	(18)
	Capacity					Energy					Utility NEIs	Non Electric			Societal			
	Summer Generation	Capacity DRIPE	Transmission	Distribution	Reliability	Winter Peak Energy	Winter Off Peak Energy	Summer Peak Energy	Summer Off Peak Energy	Electric Energy DRIPE	Utility NEIs	Natural Gas and DRIPE	Oil and Oil DRIPE	Propane and Water	Non Resource	Carbon	NOx	Economic
Non-Income Eligible Residential																		
Residential New Construction	\$48	\$43	\$94	\$93	\$1	\$369	\$485	\$144	\$110	\$289	\$0	\$0	\$325	\$1,304	\$66	\$833	\$28	\$2,101
ENERGY STAR® HVAC	\$182	\$159	\$357	\$353	\$2	\$2,398	\$2,987	\$221	\$185	\$1,833	\$0	\$55	\$1,639	-\$16	\$384	\$3,762	\$131	\$6,908
EnergyWise	\$148	\$162	\$291	\$288	\$2	\$267	\$273	\$178	\$157	\$314	\$0	\$0	\$8,984	\$233	\$1,267	\$3,605	\$458	\$14,575
EnergyWise Multifamily	\$94	\$79	\$182	\$180	\$1	\$595	\$742	\$106	\$89	\$464	\$0	\$0	\$632	\$48	\$1,931	\$1,004	\$43	\$4,339
Home Energy Reports	\$207	\$450	\$365	\$362	\$6	\$646	\$531	\$251	\$183	\$640	\$0	\$0	\$0	\$0	\$0	\$1,736	\$23	\$2,641
Residential Consumer Products	\$335	\$719	\$752	\$745	\$9	\$903	\$981	\$485	\$487	\$1,496	\$0	\$15	\$42	\$41	\$4	\$2,663	\$37	\$4,251
Income Eligible Residential SUBTOTAL	\$1,014	\$1,612	\$2,041	\$2,022	\$21	\$5,178	\$5,999	\$1,385	\$1,210	\$5,036	\$0	\$70	\$11,622	\$1,609	\$3,652	\$13,603	\$720	\$34,816
Income Eligible Residential																		
Single Family - Income Eligible Services	\$275	\$253	\$541	\$536	\$3	\$874	\$967	\$410	\$423	\$801	\$273	\$77	\$5,282	\$386	\$10,935	\$3,428	\$295	\$11,415
Income Eligible Multifamily	\$22	\$19	\$43	\$43	\$0	\$789	\$1,008	\$30	\$25	\$554	\$341	\$0	\$642	\$53	\$3,617	\$1,137	\$45	\$4,210
Income Eligible Residential SUBTOTAL	\$297	\$271	\$584	\$578	\$3	\$1,663	\$1,975	\$440	\$448	\$1,354	\$614	\$77	\$5,924	\$439	\$14,552	\$4,565	\$340	\$15,626
Commercial & Industrial																		
Large Commercial New Construction	\$1,526	\$1,302	\$2,984	\$2,957	\$16	\$5,671	\$3,324	\$3,596	\$2,177	\$4,804	\$0	-\$257	\$0	\$5	\$1,722	\$8,951	\$116	\$37,384
Large Commercial Retrofit	\$2,865	\$5,640	\$6,355	\$6,296	\$71	\$6,837	\$4,956	\$4,659	\$2,944	\$10,240	\$0	-\$1,854	\$0	\$38	\$10,783	\$15,755	\$78	\$152,625
Small Business Direct Install	\$248	\$599	\$569	\$564	\$7	\$1,395	\$807	\$1,018	\$519	\$2,089	\$0	-\$400	\$0	\$0	\$1,942	\$3,226	\$14	\$17,686
C&I SUBTOTAL	\$4,639	\$7,541	\$9,908	\$9,817	\$94	\$13,903	\$9,088	\$9,273	\$5,640	\$17,133	\$0	-\$2,511	\$0	\$43	\$14,447	\$27,933	\$208	\$207,695
Included in PIM? (Y/N)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N
Percent Application in PIM	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	50%	50%	50%	0%	0%	0%	0%
Category	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Resource Benefits	Resource Benefits	Resource Benefits	NA	NA	NA	NA

Notes
From 2022 Benefit-Cost Model, reflects benefits in Table E-6

**Table E-8B - PROVISIONAL PLAN 2
National Grid
2022 Electric PIM Costs**

	(1)	(2)	(3)
	Costs (\$)		
	Eligible Spending Budget from Table E-3	Regulatory Costs	Total Costs for PIM Calculations
Non-Income Eligible Residential SUBTOTAL	\$31,192,043	\$2,615,640	\$33,807,683
Income Eligible Residential SUBTOTAL	\$16,811,572	\$2,615,640	\$19,427,212
C&I SUBTOTAL	\$49,524,322	\$2,615,640	\$52,139,962
Included in PIM? (Y/N)	Y	Y	Y

Notes

Source is Table E-2 and E-3. Regulatory costs allocated equally to each sector.

Table E-8C - PROVISIONAL PLAN 2
National Grid
2022 Electric PIM and SQA

Sector PI = min(Payout Cap(i), [Actual Net Benefits * Design Payout Rate(g) * Payout Rate Adjustment(i)])

Sector	Planned Eligible Benefits		Planned Eligible Costs	Planned Eligible Net Benefits (4)	Design Performance Achievement	Design Performance Payout	Design Payout Rate	Design Payout Rate Thresholds	Payout Rate Adjustments	Payout Cap	Service Quality Metric
	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	(j)	(k)
	100% Electric Utility System Benefits	50% Resource Benefits	Eligible Spending Budget + Regulatory Costs	=(a)+(b)-(c)	Net benefits at which design incentive pool is achieved	Set by PUC	=(f)/(e)	Achievement levels at which the Payout Rate Adjustments in (i) will be applied—Set by PUC	Factor to adjust Design Payout Rate for if final program achievement fall within the ranges in (h)—Set by PUC	=1.25*(j)	Yes if (d) ≤ 0; No if (d) > 0
										Cap on sector payout regardless of achievement in sector	See Service Quality Table
Non-income Eligible Residential	\$25,517,341	\$6,650,701	\$33,807,683	-\$1,639,641	\$2,000,000	\$500,000	25%	a. Achievement < 25% b. 25% ≤ Achievement < 50% c. 50% ≤ Achievement < 75% d. 75% ≤ Achievement *Spending > Planned Eligible Costs	a. 0.0 b. Achievement/100 + 0.1 c. Achievement/100 + 0.25 d. 0.0 *See Boundary Rules	\$625,000	Yes
Income Eligible Residential	\$8,228,275	\$3,220,366	\$19,427,212	-\$7,978,571	\$2,000,000	\$500,000	25%			\$625,000	Yes
Commercial & Industrial	\$87,036,395	-\$1,233,853	\$52,139,962	\$33,662,580	\$33,662,580	\$5,500,000	16%			\$6,875,000	No

Sector SQA = Maximum Service Adjustment(e) * Service Achievement Scaling Factor(g)

	Planned Eligible Benefits		Planned Eligible Costs	Design Service Achievement	Maximum Service Adjustment	Service Adjustment Thresholds	Service Achievement Scaling Factors	Achievement Cost Adjustment
	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
	100% Electric Utility System Benefits	50% Resource Benefits	Eligible Spending Budget + Regulatory Costs	=(a)+(b)	Maximum downward adjustment to earned incentive—Set by PUC	Adjusted Achievement levels at which the Service Adjustments in (e) will be applied; adjustment is calculated in (h)	Factor to scale program achievement that fall within the ranges in (f)	Actual-cost-based adjustment factor applied to achievement. Result is if the difference between achievement and cost variances are greater than 5%, the Actual Achievement will be adjusted for use in
Non-income Eligible Residential	\$25,517,341	\$6,650,701	\$33,807,683	\$32,168,042	\$1,251,250	a. Adjusted Achievement < 65% b. 65% ≤ Adjusted Achievement < 95% c. 95% ≤ Adjusted Achievement	a. 1 b. 95-Adjusted Achievement/30 c. 0	Performance Variance = "Actual Benefits" / "Design Achievement" - "Spending" / "Planned Eligible Cost" If the absolute value (Performance Variance) ≤ 0.05, Then Adjusted Achievement = Actual Achievement Else Adjusted Achievement = Actual Achievement * (1 + Performance Variance)
Income Eligible Residential	\$8,228,275	\$3,220,366	\$19,427,212	\$11,448,641	\$715,000			
Commercial & Industrial	\$87,036,395	-\$1,233,853	\$52,139,962	N/A	N/A			

**Table E-9 - PROVISIONAL PLAN 2
National Grid
Revolving Loan Fund Projections**

Large C&I Revolving Loan Fund		Small Business Revolving Loan Fund	
(1) Total Loan Fund Deposits Through 2021	\$ 18,547,780	(1) Total Loan Fund Deposits Through 2021	\$ 3,303,570
(2) Current Loan Fund Balance	\$ 7,208,593	(2) Current Loan Fund Balance	\$ 2,743,078
<i>Loans Paid Year-To-Date</i>	\$ 3,356,693	<i>Loans Paid Year-To-Date</i>	\$ 570,365
<i>Repayments Year-To-Date</i>	\$ 2,946,562	<i>Repayments Year-To-Date</i>	\$ 606,588
(3) Projected Additional Loans by Year End 2021	\$ 5,770,777	(3) Projected Additional Loans by Year End 2021	\$ 510,000
(4) Projected Additional Repayments by Year End 2021	\$ 2,453,636	(4) Projected Additional Repayments by Year End 2021	\$ 275,529
(5) Projected Year End Loan Fund Balance 2021	\$ 3,891,451	(5) Projected Year End Loan Fund Balance 2021	\$ 2,508,608
(6) 2022 Fund Injection	\$ 2,000,000	(6) 2022 Fund Injection	\$ -
(7) Projected Loan Fund Balance, January 2022	\$ 5,891,451	(7) Projected Loan Fund Balance, January 2022	\$ 2,508,608
(8) Projected Repayments throughout 2022	\$ 3,881,906	(8) Projected Repayments throughout 2022	\$ 245,746
(9) Estimated Loans in 2022	\$ 8,928,261	(9) Estimated Loans in 2022	\$ 1,500,000
(10) Projected Year End Loan Fund Balance 2022	\$ 845,095	(10) Projected Year End Loan Fund Balance 2022	\$ 1,254,353
Public Sector Revolving Loan Fund		Efficient Buildings Fund	
(1) Total Loan Fund Deposits Through 2021	\$ 54,065	(1) Energy Efficiency Funds allocated to EBF through 2021	\$ 27,087,113
(2) Current Loan Fund Balance	\$ 34,124	(2) Total EBF Loans Outstanding	\$ 55,075,045
<i>Funds returned to OER</i>	\$ -		
<i>Repayments Year-To-Date</i>	\$ 34,052		
(3) Projected Additional Loans by Year End	\$ -		
(4) Projected Additional Repayments by Year End	\$ 15,523		
(5) Projected Year End Loan Fund Balance 2021	\$ 49,647		
(6) 2022 Fund Injection	\$ -		
(7) Projected Loan Fund Balance, January 2022	\$ 49,647		
(8) Projected Repayments throughout 2022	\$ 2,945		
(9) Estimated Loans in 2022	\$ -		
(10) Projected Year End Loan Fund Balance 2022	\$ 52,592		

Notes

- 1 Funding injections since loan funds began. Net of any adjustments.
- 2 Current Loan Fund Balance is through July 2021; it includes all loans and repayments made by July 2021. Public Sector Revolving Loan Fund reduced by transfers to RI PEP Incentives. EBF reports in terms of loans outstanding.
- 3 Projected Loans from July to Year-End 2021 is estimated based on projects currently under construction that are anticipated to be paid out by year-end. It is difficult to project this amount accurately due to the fact that projects could be delayed by a month or two resulting in payment occurring in 2022 instead of 2021.
- 4 Projected Repayments from June to Year-End 2021 is estimated based on the monthly average amount of repayments.
- 5 Equal to (2) - (3) + (4).
- 6 Fund injection of \$2M for the Large C&I Revolving Loan Fund is included under the Finance Cost line in table E-2.
- 7 Equal to (5) + (6).
- 8 Assumption based on monthly average repayments in 2021 over 12 month period; repayments accumulate over time and may vary widely.
- 9 Amount projected to be lent to customers in 2022
- 10 Equal to (7) + (8) - (9).
- Efficient Buildings Fund - The 2022 Annual Plan only includes two values for EBF: 1) The Energy Efficiency Funds allocated to EBF through 2021. This assumes that the \$5M allocated to EBF for 2021 will be transferred to RIIB in 2021. 2) Total EBF Loans Outstanding as of July 2021. Additional information is not available because RIIB has informed the Company that, commencing with the 2022 Plan, it will not be providing forward looking projections to the Company regarding EBF. The Company is therefore unable to provide any future projections in the 2022 Annual Plan regarding EBF. The state's System Reliability and Least Cost procurement statute (amended in 2021) directs that \$5M shall be transferred to RIIB. However, RIIB has not informed the Company the statutory \$5M transfer to RIIB in 2022 will go to EBF.

Table E-10 - PROVISIONAL PLAN 2
National Grid
Rhode Island Electric Energy Efficiency 2003 - 2022
\$(000)

Electric	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013⁽⁴⁾	2014	2015	2016	2017	2018	2019	2020⁽⁵⁾	2021⁽⁶⁾	2022⁽⁵⁾
Energy Efficiency Budget (\$Million) ⁽¹⁾	\$23.1	\$22.6	\$23.1	\$22.4	\$22.5	\$21.0	\$32.4	\$37.6	\$59.2	\$61.4	\$77.5	\$87.0	\$86.6	\$87.5	\$94.6	\$94.6	\$107.5	\$111.1	\$116.8	\$117.1
Spending Budget (\$Million) ⁽²⁾	\$16.3	\$15.8	\$17.6	\$16.5	\$16.4	\$14.7	\$23.5	\$28.8	\$45.3	\$55.3	\$64.8	\$80.6	\$77.3	\$77.6	\$88.5	\$88.7	\$98.1	\$101.1	\$104.8	\$97.5
Actual Expenditures (\$Million) ⁽³⁾	\$22.8	\$19.5	\$23.4	\$23.7	\$21.9	\$19.2	\$31.7	\$29.7	\$40.0	\$50.7	\$72.9	\$85.3	\$87.4	\$78.4	\$94.8	\$93.0	\$100.7	\$88.2		
Incentive Percentage ⁽¹⁰⁾	4.4%	4.4%	4.4%	4.4%	4.4%	4.4%	4.4%	4.4%	4.4%	4.4%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	N/A	N/A
Target Incentive ⁽¹¹⁾	\$712,557	\$781,959	\$774,689	\$726,627	\$723,000	\$647,689	\$1,035,943	\$1,267,043	\$1,992,513	\$2,434,131	\$3,240,747	\$4,032,000	\$3,867,400	\$3,878,087	\$4,425,528	\$4,436,022	\$4,905,009	\$5,054,448	\$5,500,000	\$5,500,000
Earned Incentive	\$712,557	\$604,876	\$795,648	\$760,623	\$716,075	\$675,282	\$1,085,888	\$1,333,996	\$1,929,273	\$2,469,411	\$2,997,681	\$4,223,321	\$4,533,360	\$4,128,034	\$4,829,847	\$4,940,402	\$3,290,237	\$3,242,675		
Annual Summer Demand kW Savings Goal Achieved (%)				106%	106%	113%	142%	78%	71%	83%	114%	78%	112%	101%	103%	116%	98%	79%		
Annual MWh Energy Savings Goal Achieved (%)				111%	102%	111%	115%	107%	94%	93%	99%	105%	115%	107%	115%	110%	98%	88%		
Energy Efficiency Program Charge (\$/kWh) ⁽⁷⁾	\$0.00200	\$0.00200	\$0.00200	\$0.00200	\$0.00200	\$0.00200	\$0.00320	\$0.00320	\$0.00526	\$0.00592	\$0.00876	\$0.00911	\$0.00953	\$0.01077	\$0.01124	\$0.00972	\$0.01121	\$0.01323	\$0.01113	\$0.01350
Annual Cost to 500 kWh/month Residential Customer w/o tax ⁽⁸⁾	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$19.20	\$19.20	\$31.56	\$35.52	\$52.56	\$54.66	\$57.18	\$64.62	\$67.44	\$58.32	\$67.26	\$79.38	\$66.78	\$81.00
Annual Cost to 500 kWh/month Residential Customer w/ tax ⁽⁹⁾	\$12.50	\$12.50	\$12.50	\$12.50	\$12.50	\$12.50	\$20.00	\$20.00	\$32.88	\$37.00	\$54.75	\$56.94	\$59.56	\$67.31	\$70.25	\$60.75	\$70.06	\$82.69	\$69.56	\$84.38

Notes:

- (1) Energy Efficiency Budget includes total expenditures and commitments. Includes all demand side management program-related expenses, including rebates, administration and general expenses, evaluation, commitments for future years and Company incentive.
- (2) Prior to 2017, Spending Budget Eligible for Shareholder Incentive includes: Implementation, Administration, General, and Evaluation Expenses; excludes EERMC and OER Costs, Commitments, Copays, and Outside Finance Costs. Beginning in 2017, Outside Finance Costs were also included. Beginning in 2018 Pilot expenses were also excluded. Beginning in 2019 ConnectedSolutions expenses and assessments were also excluded.
- (3) Actual Expenditures is actual spend during calendar year. Includes expenditures and commitments. Includes all demand side management program-related expenses, including rebates, administration and general expenses, evaluation, commitments for future years and Company incentive.
- (4) In the Company's gas and electric rate cases in docket 4323, the PUC approved the uncollectibles gross-up in the electric EE Program Charge effective February 1, 2013, and a new rate applicable to the gross-up of the gas EE Program Charge, effective February 1, 2013.
- (5) 2021 values are planned.
- (6) 2022 values are proposed.
- (7) Beginning in 2012, the EE Program Charge includes the System Reliability Factor. It does not include the \$0.0003 renewables per RI General Laws §39-2-1.2 and Order #19608, which appears on customer bills.
- (8) Reflects the annual cost excluding Gross Earnings Tax.
- (9) Reflects the annual cost including Gross Earnings Tax.
- (10) Incentive percentage not applicable for 2021 due to new performance incentive mechanism developed for the 2021 Annual Plan. See Section 11 of the Main Text of the 2022 Annual Plan for additional details.
- (11) Target incentive is calculated in the same way as in 2021 in order to provide a more accurate estimate of the energy efficiency surcharge.

**Table E-2 - Provisional Plan 2 - Attachment PUC 5-3-1
National Grid
2022 Electric Energy Efficiency Program Budget (\$000)**

	Program Planning & Administration	Marketing	Cost of services and product rebates/incentives provided to customers	Sales, Technical Assistance & Training	Evaluation & Market Research	Total Performance Incentive	Grand Total
Non-Income Eligible Residential							
Residential New Construction	\$0.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.1
ENERGY STAR® HVAC	\$0.4	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.5
EnergyWise	\$2.0	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$2.2
EnergyWise Multifamily	\$0.4	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.4
Residential Consumer Products	\$0.3	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.3
Home Energy Reports	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Residential ConnectedSolutions	\$0.2	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.2
Energy Efficiency Education Programs	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Residential Pilots	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Community Based Initiatives - Residential	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Comprehensive Marketing - Residential	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Residential Performance Incentive	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Subtotal - Non-Income Eligible Residential	\$3.4	\$0.0	\$0.0	\$0.3	\$0.0	\$0.0	\$3.7
Income Eligible Residential							
Single Family - Income Eligible Services	\$1.7	\$0.0	\$0.0	\$0.1	\$0.0	\$0.0	\$1.8
Income Eligible Multifamily	\$0.5	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.5
Income Eligible Performance Incentive	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Subtotal - Income Eligible Residential	\$2.1	\$0.0	\$0.0	\$0.2	\$0.0	\$0.0	\$2.3
Commercial & Industrial							
Large Commercial New Construction	(\$64.9)	\$0.0	\$2,605.3	\$231.9	\$0.0	\$0.0	\$2,772.2
Large Commercial Retrofit	\$49.5	\$0.0	\$1,037.4	\$120.4	\$0.0	\$0.0	\$1,207.3
Small Business Direct Install	\$9.3	\$0.0	\$0.0	\$2.6	\$0.0	\$0.0	\$11.9
Commercial ConnectedSolutions	\$0.6	\$0.0	\$0.0	\$1.4	\$0.0	\$0.0	\$2.0
Commercial Pilots	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Community Based Initiatives - C&I	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Finance Costs	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Commercial Workforce Development	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Commercial & Industrial Performance Incentive	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Subtotal - Commercial & Industrial	(\$5.6)	\$0.0	\$3,642.7	\$356.3	\$0.0	\$0.0	\$3,993.4
Regulatory							
OER	\$64.1	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$64.1
EERMC	\$42.7	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$42.7
Rhode Island Infrastructure Bank	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0
Subtotal - Regulatory	\$106.8	\$0.0	\$0.0	\$0.0	\$0.0	\$0.0	\$106.8
Grand Total	\$106.8	\$0.0	\$3,642.7	\$356.7	\$0.0	\$0.0	\$4,106.2

Notes:

- (1) 2022 Large Commercial Retrofit Commitments (\$000):
- (2) For more information on Finance Costs, please refer to Attachment 2, Section 9.
- (3) OER and EERMC total 3.0% of customers' EE Program Charge collected on Table E-1, minus 3%.
- (4) Finance Costs are detailed in Table E-9. Finance Costs include an injection of \$2M into the Large C&I Revolving Loan Fund. Without this injection the Large C&I Revolving Loan Fund is projected to be negative by the end of 2022.
- (5) Demonstrations and Assessments budgets are included in specific program level budgets listed above. More information on Demonstration and Assessments descriptions, budgets, and which program level budget they are included in can be found in Attachment 8.
- (6) Based on the state's System Reliability and Least Cost procurement statute (amended in 2021), funds transferred to the Rhode Island Infrastructure Bank are now classified under Regulatory costs.

**Table E-5 - Provisional Plan 2 - Attachment PUC 5-3-1
National Grid
Calculation of 2022 Program Year Cost-Effectiveness
All Dollar Values in (\$000)**

	RI Test Benefit/ Cost ¹	Total Benefit	Program Implementation Expenses ²	Customer Contribution	Performance Incentive	¢/Lifetime kWh
Non-Income Eligible Residential						
Residential New Construction	0.00	\$0.0	\$0.1	\$0.0		
ENERGY STAR® HVAC	0.00	\$0.0	\$0.5	\$0.0		
EnergyWise	0.00	\$0.0	\$2.2	\$0.0		
EnergyWise Multifamily	0.00	\$0.0	\$0.4	\$0.0		
Home Energy Reports	0.00	\$0.0	\$0.0	\$0.0		
Residential Consumer Products	0.00	\$0.0	\$0.3	\$0.0		
Residential ConnectedSolutions	0.00	\$0.0	\$0.2	\$0.0		
Energy Efficiency Education Programs			\$0.0			
Residential Pilots			\$0.0			
Community Based Initiatives - Residential			\$0.0			
Comprehensive Marketing - Residential			\$0.0			
Non-Income Eligible Residential SUBTOTAL	0.00	\$0.0	\$3.7	\$0.0	\$0.0	
Income Eligible Residential						
Single Family - Income Eligible Services	0.00	\$0.0	\$1.8	\$0.0		
Income Eligible Multifamily	0.00	\$0.0	\$0.5	\$0.0		
Income Eligible Residential SUBTOTAL	0.00	\$0.0	\$2.3	\$0.0	\$0.0	
Commercial & Industrial						
Large Commercial New Construction	1.52	\$4,644.9	\$2,772.2	\$280.8	\$0.0	
Large Commercial Retrofit	1.52	\$2,755.2	\$1,207.3	\$607.8	\$0.0	
Small Business Direct Install	0.00	\$0.0	\$11.9	\$0.0	\$0.0	
Commercial ConnectedSolutions	0.00	\$0.0	\$2.0	\$0.0	\$0.0	
Commercial Pilots			\$0.0			
Community Based Initiatives - C&I			\$0.0			
Finance Costs			\$0.0			
Commercial Workforce Development			\$0.0			
C&I SUBTOTAL	1.52	\$7,400.1	\$3,993.4	\$888.6	\$0.0	
Regulatory						
OER			64.1			
EERMC			42.7			
Rhode Island Infrastructure Bank			0.0			
Regulatory SUBTOTAL			\$106.8			
TOTAL	1.48	\$7,400.1	\$4,106.2	\$888.6	\$0.0	

Notes:

- (1) RI Test B/C Test = Total Benefits from Table E-6A / Program Implementation Expenses from Table E-3
Also includes effects of free-ridership and spillover.
- (2) For Implementation Expenses derivation, see Table E-3.

**Table E-5 - Provisional Plan 2 - Attachment PUC 5-3-1
National Grid
Calculation of 2022 Program Year Cost-Effectiveness with Economic Benefits Included
All Dollar Values in (\$000)**

	RI Test Benefit/ Cost ¹	Total Benefit	Program Implementation Expenses ²	Customer Contribution	Performance Incentive	¢/Lifetime kWh
Non-Income Eligible Residential						
Residential New Construction	1.40	\$0.2	\$0.1	\$0.0		
ENERGY STAR® HVAC	1.42	\$0.7	\$0.5	\$0.0		
EnergyWise	0.93	\$2.0	\$2.2	\$0.0		
EnergyWise Multifamily	1.34	\$0.6	\$0.4	\$0.0		
Home Energy Reports	0.00	\$0.0	\$0.0	\$0.0		
Residential Consumer Products	1.52	\$0.4	\$0.3	\$0.0		
Residential ConnectedSolutions	0.83	\$0.2	\$0.2	\$0.0		
Energy Efficiency Education Programs			\$0.0			
Residential Pilots			\$0.0			
Community Based Initiatives - Residential			\$0.0			
Comprehensive Marketing - Residential			\$0.0			
Non-Income Eligible Residential SUBTOTAL	1.10	\$4.1	\$3.7	\$0.0	\$0.0	
Income Eligible Residential						
Single Family - Income Eligible Services	0.86	\$1.5	\$1.8	\$0.0		
Income Eligible Multifamily	1.19	\$0.6	\$0.5	\$0.0		
Income Eligible Residential SUBTOTAL	0.93	\$2.1	\$2.3	\$0.0	\$0.0	
Commercial & Industrial						
Large Commercial New Construction	4.18	\$12,747.3	\$2,772.2	\$280.8		
Large Commercial Retrofit	5.30	\$9,613.0	\$1,207.3	\$607.8		
Small Business Direct Install	1.35	\$16.1	\$11.9	\$0.0		
Commercial ConnectedSolutions	0.99	\$2.0	\$2.0	\$0.0		
Commercial Pilots			\$0.0			
Community Based Initiatives - C&I			\$0.0			
Finance Costs			\$0.0			
Commercial Workforce Development			\$0.0			
C&I SUBTOTAL	4.58	\$22,378.5	\$3,993.4	\$888.6	\$0.0	
Regulatory						
OER			64.1			
EERMC			42.7			
Rhode Island Infrastructure Bank			0.00			
Regulatory SUBTOTAL			\$106.8			
TOTAL	4.48	\$22,384.6	\$4,106.2	\$888.6	\$0.0	

Notes:

- (1) RI Test B/C Test = Total Benefits from Table E-6A / Program Implementation Expenses from Table E-3
Also includes effects of free-ridership and spillover.
- (2) For Implementation Expenses derivation, see Table E-3.

Table E-5A - Provisional Plan 2 - Attachment PUC 5-3-1
National Grid
Calculation of 2022 Program Year Cost-Effectiveness with TRC Test
All Dollar Values in (\$000)

	TRC Benefit/ Cost¹	Total Benefit	Program Implementation Expenses²	Customer Contribution	Performance Incentive	¢/Lifetime kWh
Non-Income Eligible Residential						
Residential New Construction	0.00	\$0.0	\$0.1	\$0.0		
ENERGY STAR® HVAC	0.00	\$0.0	\$0.5	\$0.0		
EnergyWise	0.00	\$0.0	\$2.2	\$0.0		
EnergyWise Multifamily	0.00	\$0.0	\$0.4	\$0.0		
Home Energy Reports	0.00	\$0.0	\$0.0	\$0.0		
Residential Consumer Products	0.00	\$0.0	\$0.3	\$0.0		
Residential ConnectedSolutions	0.00	\$0.0	\$0.2	\$0.0		
Energy Efficiency Education Programs			\$0.0			
Residential Pilots			\$0.0			
Community Based Initiatives - Residential			\$0.0			
Comprehensive Marketing - Residential			\$0.0			
Non-Income Eligible Residential SUBTOTAL	0.00	\$0.0	\$3.7	\$0.0	\$0.0	
Income Eligible Residential						
Single Family - Income Eligible Services	0.00	\$0.0	\$1.8	\$0.0		
Income Eligible Multifamily	0.00	\$0.0	\$0.5	\$0.0		
Income Eligible Residential SUBTOTAL	0.00	\$0.0	\$2.3	\$0.0	\$0.0	
Commercial & Industrial						
Large Commercial New Construction	1.17	\$3,575.2	\$2,772.2	\$280.8		
Large Commercial Retrofit	1.17	\$2,122.2	\$1,207.3	\$607.8		
Small Business Direct Install	0.00	\$0.0	\$11.9	\$0.0		
Commercial ConnectedSolutions	0.00	\$0.0	\$2.0	\$0.0		
Commercial Pilots			\$0.0			
Community Based Initiatives - C&I			\$0.0			
Finance Costs			\$0.0			
Commercial Workforce Development			\$0.0			
C&I SUBTOTAL	1.17	\$5,697.4	\$3,993.4	\$888.6	\$0.0	
Regulatory						
OER			\$64.1			
EERMC			\$42.7			
Rhode Island Infrastructure Bank			\$0.0			
Regulatory SUBTOTAL			\$106.8			
TOTAL	1.14	\$5,697.4	\$4,106.2	\$888.6	\$0.0	

(1) TRC B/C Test omits societal benefits that are monetized in the RI Test, including non-embedded emissions (CO2 and Nox), and economic benefits Also includes effects of free-ridership and spillover.

(2) For Implementation Expenses derivation, see Table E-3.

Table E-6 - Provisional Plan 2 - Attachment PUC 5-3-1
National Grid
Summary of 2022 Benefits by Program (Energy Efficiency Measures)

	Total	Total (Economic Excluded)	Capacity					Energy				Non Electric				Societal			
			Summer Generation	Capacity DRIPE	Trans	Dist	Reliability	Winter		Summer		Electric Energy DRIPE	Natural Gas	Oil	Other Resource	Non Resource	Carbon	NOx	Economic
								Winter Peak	Winter Off Peak	Summer Peak	Summer Off Peak								
Non-Income Eligible Residential																			
Residential New Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
ENERGY STAR® HVAC	\$1	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
EnergyWise	\$2	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
EnergyWise Multifamily	\$1	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Home Energy Reports	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Residential Consumer Products	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Non-Income Eligible Residential SUBTOTAL	\$4	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Income Eligible Residential																			
Single Family - Income Eligible Services	\$2	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Income Eligible Multifamily	\$1	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Income Eligible Residential SUBTOTAL	\$2	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Commercial & Industrial																			
Large Commercial New Construction	\$12,747	\$4,645	\$190	\$147	\$368	\$365	\$2	\$713	\$377	\$438	\$260	\$539	\$0	\$0	\$1	\$174	\$1,054	\$16	\$8,102
Large Commercial Retrofit	\$9,613	\$2,755	\$89	\$110	\$183	\$181	\$1	\$246	\$229	\$169	\$145	\$326	\$34	\$0	\$8	\$403	\$622	\$11	\$6,858
Small Business Direct Install	\$16	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$16
C&I SUBTOTAL	\$22,376	\$7,400	\$279	\$257	\$551	\$546	\$3	\$959	\$606	\$607	\$405	\$865	\$34	\$0	\$9	\$577	\$1,675	\$27	\$14,982
TOTAL	\$22,382	\$7,400	\$279	\$257	\$551	\$546	\$3	\$959	\$606	\$607	\$405	\$865	\$34	\$0	\$9	\$577	\$1,675	\$27	\$14,982

Table E-6A - Provisional Plan 2 - Attachment PUC 5-3-1
National Grid
Summary of 2022 Impacts by Program (Energy Efficiency Measures)

	Load Reduction in kW		Electric Energy Savings				Gas Saved		Oil Saved		Propane Saved		Total Net Savings (Electric, Gas, Oil, Propane)	
	Summer	Winter	MWh		MMBtu		MMBtu		MMBtu		MMBtu		MMBtu	
			Annual	Lifetime	Annual	Lifetime	Annual	Lifetime	Annual	Lifetime	Annual	Lifetime	Annual	Lifetime
Commercial & Industrial														
Large Commercial New Construction	223	173	1,567	26,036	5,345	88,836	-	-	-	-	-	-	5,345	88,836
Large Commercial Retrofit	166	149	1,084	12,365	3,699	42,189	236	4,015	-	-	-	-	3,935	46,204
Small Business Direct Install	-	-	-	-	-	-	-	-	-	-	-	-	-	-
C&I SUBTOTAL	389	323	2,651	38,401	9,044	131,024	236	4,015	-	-	-	-	9,280	135,040
TOTAL	389	323	2,651	38,401	9,044	131,024	236	4,015	-	-	-	-	9,280	135,040

Notes:

1) Lifetime savings are equal to annual savings multiplied by the expected life of measures expected to be installed in each program.

**Table E-6B - Provisional Plan 2 - Attachment PUC 5-3-1
National Grid
Summary of 2022 Demand Response Benefits and Savings**

	Benefits (000's)															Load Reduction (MW)	MWh Saved		
	Total	Total (Economic Excluded)	Capacity					Energy				Non Electric	Societal		Summer		Annual	Lifetime	
			Summer Generation	Capacity DRIPE	Trans	Dist	Reliability	Winter		Summer		Energy DRIPE	Non Resource	Carbon					Economic
								Peak	Off Peak	Peak	Off Peak								
Non-Income Eligible Residential																			
Residential ConnectedSoluti	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Commercial & Industrial																			
Commercial ConnectedSolu	\$2	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2	\$0	\$0	\$0	\$0
TOTAL	\$2	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2	0.0	0.0	0.0	0.0

**Table E-8A - Provisional Plan 2 - Attachment PUC 5-3-1
National Grid
2022 Electric PIM Benefits, Allocations, and Categorization (\$000)**

	(1)	(2)	(3)		(4)	(5)	(6)	(7)	(8)		(9)	(10)	(11)	(12)	(13)		(14)	(15)	(16)	(17)		(18)
	Summer Generation	Capacity DRIPE	Capacity		Transmission	Distribution	Reliability	Winter Peak Energy	Winter Off Peak Energy	Energy	Summer Peak Energy	Summer Off Peak Energy	Electric Energy DRIPE	Utility NEIs	Natural Gas and DRIPE	Oil and Oil DRIPE	Propane and Water	Non Resource	Carbon	NOx	Economic	
Non-Income Eligible Residential																						
Residential New Construction	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
ENERGY STAR® HVAC	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1
EnergyWise	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2
EnergyWise Multifamily	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1
Home Energy Reports	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Residential Consumer Products	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
on-Income Eligible Residential SUBTOTAL	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$4
Income Eligible Residential																						
Single Family - Income Eligible Services	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2
Income Eligible Multifamily	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1
Income Eligible Residential SUBTOTAL	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2
Commercial & Industrial																						
Large Commercial New Construction	\$190	\$147	\$368	\$365	\$2	\$713	\$377	\$438	\$260	\$539	\$0	\$0	\$0	\$0	\$1	\$174	\$1,054	\$16	\$8,102			
Large Commercial Retrofit	\$89	\$110	\$183	\$181	\$1	\$246	\$229	\$169	\$145	\$326	\$0	\$34	\$0	\$8	\$403	\$622	\$11	\$6,858				
Small Business Direct Install	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$16
C&I SUBTOTAL	\$279	\$257	\$551	\$546	\$3	\$959	\$606	\$607	\$405	\$865	\$0	\$34	\$0	\$9	\$577	\$1,675	\$27	\$14,976				
Included in PIM? (Y/N)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N	N	N	N	N
Percent Application in PIM	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	50%	50%	50%	0%	0%	0%	0%	0%
Category	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Electric Utility System Benefits	Resource Benefits	Resource Benefits	Resource Benefits	NA	NA	NA	NA	NA	NA

Notes
From 2022 Benefit-Cost Model, reflects benefits in Table E-6

PUC 5-4

Request:

Referencing The Massachusetts Electric Company and Nantucket Electric Company's response to DPU-Comm 9-11 in Docket No. D.P.U. 21-128, please answer the following questions in detail regarding the Rhode Island energy efficiency program:

- a. Whether any vendors have abused upstream incentives resulting in fraud or noncompliance with program rules;
- b. Whether and how program administrators have been able to monitor upstream incentives. If the Company is unable to monitor upstream incentives, explain why;
- c. The cost to Rhode Island ratepayers of any fraud or noncompliance with program rules related to upstream incentives;
- d. As a result of the investigation referenced in DPU-Comm 9-11 or any other related internal or external investigation, including of National Grid personnel involved in administering the energy efficiency program, was any other fraud, misconduct, mistake, or noncompliance with program rules discovered; and
- e. If the answer to (d) is yes, please describe in detail the fraud, misconduct, mistake, or noncompliance with program rules discovered, the impact on Rhode Island ratepayers, how the Company proposes to address the impact, and all remedial or corrective measures the Company has taken or intends to take as a result.

Response:

- a. The Company and its Massachusetts affiliates, Massachusetts Electric Company and Nantucket Electric Company, (collectively, the Company and the Company's Massachusetts affiliates are referred to as "National Grid") along with other energy efficiency program administrators in Massachusetts (collectively, National Grid and the other energy efficiency program administrators in Massachusetts are referred to as the "PAs") identified noncompliance with certain program rules by one program participant serving as a manufacturer/distributor of energy efficient lighting products (the "manufacturer"). The manufacturer served as a program participant in both Massachusetts and Rhode Island and National Grid determined that the noncompliance described in the Company's Massachusetts affiliates' response to DPU-Comm 9-11(a) applied to both Massachusetts and Rhode Island program rules. As such, the essence of

this response, although tailored to Rhode Island, echoes the response provided by Company's Massachusetts affiliates to DPU-Comm 9-11(a).

National Grid's residential upstream lighting initiative involves multiple program participants, including several manufacturers and numerous retailers. As explained below, National Grid identified noncompliance with certain program rules by one manufacturer such that rebates were sought for claimed sales volumes of lighting products which appeared to exceed the distribution capabilities of the retailers involved, and specifically, two retailers listed as distributing a significant portion of the manufacturer's product. The PAs engaged outside professionals to assist them in investigating this activity. The professionals reviewed the period of August 2018 to July 2020 and did not find that the noncompliance with program rules, although material, amounted to fraud.

As background, the residential upstream lighting program offered financial incentives to wholesalers (also referred to as manufacturers) for the distribution of energy efficient lighting products, through various retailers, to consumers. The objective of the program has been to transform the lighting market by making energy efficient lighting products more easily available and less expensive for consumers. The initiative has been successful in realizing this goal.

National Grid engaged two vendors to assist in administering the programs in Rhode Island and Massachusetts, an "incentive processor" and a "field implementer." In the upstream delivery model, participating manufacturers agree to provide invoices accompanied by sales data on a monthly basis to the incentive processor. The incentive processor is responsible for review of the data for compliance with program requirements, and for submission of compliant invoices to National Grid for payment. Among other responsibilities, the field implementer is required to perform periodic on-site evaluations at retailer locations to assure program compliance.

In order to meet upstream lighting's high saturation/low-cost objective, the standard for determining whether payment of incentives is proper does not involve tracking the installation of every bulb to a socket. Instead, determination to pay incentives is based upon records of sales made by retailers, as presented by manufacturers to the incentive processor, and examined by the incentive processor for compliance with program requirements.

The program controls imposed by National Grid, and implemented by the incentive processor and field implementer, have been intended to ensure, among other things, that incentives are not paid other than for covered products distributed to consumers in the

designated service territories. Notwithstanding these controls, it was inherently possible that some program participants might circumvent the rules in certain respects where bulb-to-socket tracking was not required.

In early 2020, the PAs were alerted to and identified anomalous reported sales activity involving one manufacturer and two retailers. That manufacturer had presented to the incentive processor records of sales made by these two retailers that were likely in excess of those retailers' capacities to distribute products through their stores to consumers in the designated service territories. This anomalous sales activity led to further PA investigation (with the assistance of outside professionals) and remedial actions, including but not limited to the removal of the manufacturer from the program in Massachusetts and Rhode Island, refusal to pay any of the manufacturer's open invoices for sales of those two retailers, and refusal to pay any of that manufacturer's claimed yet-to-be invoiced amounts for products distributed to those retailers. Since the manufacturer participated in both the Massachusetts and Rhode Island programs, National Grid applied the same remedial actions for both service territories. In both Massachusetts and Rhode Island, the Company and other PAs are not claiming any savings for products for which they refused to pay incentives.

For both Massachusetts and Rhode Island, the Company and other PAs also implemented certain additional program controls designed to enhance program operations. These controls included, without limitation, issuing revised contract documents executed by all pertinent parties including the incentive processor, manufacturer and retail representative (referred to as Memoranda of Understanding or "MOUs") providing for enhanced audit rights and other increased controls, and improving validation measures to be taken by the incentive processor before invoicing.

Notably, the outside professionals engaged by the PAs to investigate this matter did not determine that fraud had occurred, but instead that this manufacturer and these retailers had not complied with certain contractual terms and conditions of the program. Importantly, the PAs' investigation found that this manufacturer had in fact purchased from its suppliers all the lighting products for which it sought rebates. The efficient lighting products were indeed delivered to the manufacturer's warehouse. The manufacturer cooperated with the investigation.

The manufacturer, however, failed to request or otherwise ensure that the retailers provide adequate supporting documentation for their claimed sales to end-use consumers so as to ensure that only such sales made to the respective Massachusetts and Rhode Island consumers were credited with incentives. Further, given store and warehouse capacity of these two retailers' stores, the manufacturer should have known that a certain

portion of the products shipped to or picked up by these retailers likely were sold outside of the designated service territories, in the form of internet sales or otherwise. It was not established if the manufacturer or retailers knowingly diverted product in violation of program requirements; however, the PAs' decision to withhold payment to the manufacturer for products provided to the two retailers was believed justified in the circumstances.

- b. The Company has been able to monitor upstream incentives. The Company has done so through a variety of means, as described in response to (a) above and subsection (e) below.
- c. Again, the outside professionals engaged by the PAs to investigate this matter did not determine that any fraud had occurred. There was evidence of contract non-compliance, however, as described in response to subsection (a) above. At an overall level, costs related to contract noncompliance and potential fraud, which exist to some degree in all market programs, are reflected in the form of administrative costs for contracting, invoice verification, inspections, audits, etc., and are reflected in overall program budgets and spending. These are programmatic costs borne by all customers and are inherent in any program in which funds are paid or products are made available. The Company did and will continue to take actions to mitigate the cost to Rhode Island ratepayers of contract noncompliance and potential fraud.
- d. Yes, as discussed in response to question (e) below.
- e. During National Grid's investigation of the manufacturer as detailed in subsection (a) above, the manufacturer raised an unrelated allegation that, in late 2017, it was asked by National Grid to hold off on submitting invoices in Rhode Island for the last three months of 2017 until early 2018. The manufacturer also claimed that, in 2018, National Grid again asked the vendor to hold off submitting invoices in Rhode Island until early 2019. National Grid conducted an internal investigation to confirm or deny the veracity of the manufacturer's statements related to "out-of-period" invoices. Ultimately, National Grid was able to confirm the validity of the manufacturer's statements and five National Grid employees (two of whom participated in the request to hold back invoices and three of whom were not directly involved in the request) were disciplined.

Following confirmation of the manufacturer's statements, National Grid engaged outside professionals to undertake a comprehensive review of out-of-period invoices for purposes of quantifying the impact, if any, of the actions of the disciplined employees on Rhode Island customers. National Grid learned that out-of-period invoices were more prevalent than anticipated across the residential upstream lighting program but were more likely a

function of imprecise accounting practices rather than the isolated incidents of misconduct. Accordingly, National Grid extended the scope of its review and looked at invoices recorded in 2016, 2017, 2018, 2019, 2020, and 2021. National Grid examined the initial batches of invoices submitted by primary manufacturers after January 1st of each year since those batches would most likely be the batches that would contain invoices that should have been accounted for during the previous calendar year. (RI energy efficiency program years operate on a calendar year basis.) National Grid took all of the out-of-period invoices that it found had been accounted for in the wrong calendar year and placed associated spend and claimed savings back into the appropriate calendar year. Next, National Grid recalculated total non-income eligible residential sector spend and savings, and resulting shareholder incentive, for each program year that was impacted to see if there was any impact on Rhode Island customers. (The impacted program years were 2015, 2016, 2017, 2018, 2019, and 2020 because all of the out-of-period invoices were recorded in the calendar year following the year the invoices should have been accounted for.) In aggregate, total spend over the multi-year period was unchanged and reportable aggregate savings increased as a result of these adjustments (a function of the fact that, due to evaluation impacts, moving the reported sale of a light bulb or fixture from one year to the following year would typically lead to a decrease in claimable net annual kWh savings and kW demand reductions for that same bulb or fixture). These adjustments, however, did lead to a downward adjustment in earned performance incentive because the Company was already above or sufficiently close to the maximum potential performance incentive earnings in specific areas in two of the years in which net kwh and kW savings were increased as a result of these adjustments. Accordingly, adding savings and spend in these years led to minor or no increase in performance incentive earnings, while reducing reported savings and spend in ensuing years as a result of these adjustments did reduce earnings in those years. As a result of performing these adjustments, National Grid was able to quantify the impact on Rhode Island customers stemming from the corrected annual shareholder incentive amounts. The result, which was recently calculated, was an aggregate, net downward adjustment of the shareholder incentive (meaning money returned to the energy efficiency program) of \$124,135. The Company plans to credit this money to the energy efficiency fund prior to February 1, 2022 so that this credit will be reflected in advance of a potential new energy efficiency surcharge for 2022.

Please note the Company is no longer proposing offering the residential upstream lighting program in Rhode Island in 2022. As was the case in Massachusetts, the Company's ability to monitor upstream incentives was not a factor in this decision. Rather, the Company's decision was due to evidence regarding the state of market transformation demonstrating that residential customers are increasingly adopting LEDs on their own.

However, the corrective and remedial measures that the Company has taken or is considering taking, include but are not limited to, the following actions:

- Implement an enhanced formal accrual process to capture incentive payments in the year that the sales period occurred. This will assist in capturing the incentive payments in the correct program period.
Status: The Company conducted training in March 2021 on the existing accrual process with refreshers in July 2021 and December 2021. The Company also added an ongoing training requirement for new hires and implemented a manager sign-off for calendar year 2021 year-end.
- Capture the sales period for the manufacturer's sales activity that is being submitted via the third-party program administrator's invoice in the Company's InDemand system. Including this data point can provide a mechanism to trace transactions, specifically those that have a higher likelihood of being classified incorrectly (between January - April for a given calendar year), to the shareholder incentive calculation to obtain comfort that it is being recorded in the appropriate period.
Status: The Company is able to review sales period when approving sales activity in the InDemand system.
- Establish formal policies and procedures related to the energy efficiency programs to ensure (i) quality review of supporting documentation submitted to the program administrator by the manufacturer; and (ii) guidelines for each respective party (i.e., sponsor, program administrator, manufacturer and retailer) and their responsibilities to ensure that the sales are validated prior to the release of an incentive payment.
Status: The Company requires signatures on all MOUs from participating retailers and manufacturers. Retailer caps, with a budget and a unit allocation, were developed and incorporated into individual MOUs. If retailer sales/caps are exceeded, it requires internal delegation of authority ("DOA") level approval. DOA levels for invoice payment signoff were implemented and additional quality control ("QC") for any invoiced quantities above allocated retailer level budgets. A payment processing checklist was developed and deployed, as well as a standard operating procedure ("SOP") for processing payments.

- Conduct a quarterly or annual training for energy efficiency program managers to reiterate the importance of the key controls, roles and responsibilities of each respective party and lessons learned from past experiences where issues arise.
Status: A compliance training was deployed for all jurisdictions in July and August of 2021, including obligations of accurate savings and financial reporting, obligation of proper accruals and do the right thing, fraud prevention and proper management of records. As part of the onboarding process, all program staff will also be required to take this training.
- Implement a monitoring process to ensure that the required supporting documentation outlined in the MOUs is being received and reviewed by a third-party.
Status: This is being done by the field implementor and provided to National Grid for approval.
- Include specific requirements in the MOU for the manufacturer to receive an incentive payment. Such requirements may include supporting documentation to be submitted by the manufacturer to the program administrator and that supporting documentation will not be accepted after a given period from the sales period.
Status: MOUs have been updated to include these requirements.
- Document standard processes for retailer field visits, procedures performed and observations to formalize the analysis and findings of site visits. This could be documented in the form of a memorandum or a template that details the procedures to be performed and the observations.
Status: Quality assurance (“QA”)/QC checklists have been developed and implemented.
- Formalize key controls for the Residential Upstream Lighting Energy Efficiency program and developing a plan to routinely audit those controls and processes.
Status: A payment processing checklist was developed and deployed, as well as an SOP for processing payments and audits to review MOU portal to ensure MOUs are executed.

PUC 5-5

Request:

During the December 9, 2021 EERMC meeting, the EERMC's consultant stated that the EERMC returns all unexpended funds to National Grid at the end of a program year. Please provide the amount of all unexpended funds returned from EERMC on a yearly basis since 2016. Include the amount and date of each transfer and show how the returned funds were accounted for in the following year.

Response:

According to the EERMC consultant, during the December 9, 2021 EERMC meeting, the EERMC's consultant stated that the Council can, at its discretion, return any unallocated funds to the Company.

Since 2016, the EERMC has not returned any funds to the Company.

PUC 5-6

Request:

Referencing the Company's response to PUC 3-6, please provide copies of all monthly invoices and any supporting documentation or correspondence for transfers or payments of EERMC expenses for the years 2020 and 2021.

Response:

Please see Attachment PUC 5-6-1, showing EERMC invoices, and Attachment PUC 5-6-2 which includes supporting correspondence approving payments of EERMC expenses by the Office of Energy Resources.

Invoice



January 31, 2020
Project No: 7345
Invoice No: 6954

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2020
PO #:

Professional Services from January 1, 2020 to January 31, 2020

Phase 001 Policy & Strategy

Optimal Staff

	Hours	Rate	Amount	
Belliveau, Eric	6.00	195.00	1,170.00	
Guerard, Michael	64.00	195.00	12,480.00	
Johnson, Craig	8.00	150.00	1,200.00	
Kravatz, Mark	44.00	185.00	8,140.00	
Totals	122.00		22,990.00	
Total Labor				22,990.00
				Total this Phase
				\$22,990.00

Phase 002 Cyclical Planning & Reporting

Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	14.75	130.00	1,917.50	
Chant, Elizabeth	1.25	195.00	243.75	
Guerard, Michael	18.50	195.00	3,607.50	
Jacobs, Adam	22.25	185.00	4,116.25	
Johnson, Craig	20.25	150.00	3,037.50	
Kravatz, Mark	5.25	185.00	971.25	
Ross, Samuel	40.00	185.00	7,400.00	
Totals	122.25		21,293.75	
Total Labor				21,293.75

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020	Invoice	6954
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Subcontractors

Energy Futures Group, Inc.	4,152.50		
Total Subcontractors	4,152.50		4,152.50
	Total this Phase		\$25,446.25

Phase	003	EERMC Oversight - EMV
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Optimal Staff

	Hours	Rate	Amount
Guerard, Michael	5.75	195.00	1,121.25
Kravatz, Mark	4.25	185.00	786.25
Totals	10.00		1,907.50
Total Labor			1,907.50

Subcontractors

Rachel Sholly	4,514.00		
Caerbannog Consulting, LLC	1,526.25		
Total Subcontractors	6,040.25		6,040.25
	Total this Phase		\$7,947.75

Phase	004	EERMC Oversight - Education/Stakeholders
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Optimal Staff

	Hours	Rate	Amount
Guerard, Michael	6.50	195.00	1,267.50
Kravatz, Mark	5.75	185.00	1,063.75
Totals	12.25		2,331.25
Total Labor			2,331.25

Reimbursable Expenses

Misc Reimbursable Expense			
1/31/2020 University of Rhode Island	2020 URI Energy Fellows Program		2,600.00
	- Duroha		
Total Reimbursables			2,600.00
	Total this Phase		\$4,931.25

Billing Limits

	Current	Prior	To-Date
Total Billings	61,315.25	0.00	61,315.25
Limit			945,000.00
Remaining			883,684.75
		Total this Invoice	\$61,315.25

Billings to Date

	Current	Prior	Total
Labor	48,522.50	0.00	48,522.50

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020		Invoice	6954
Subcontractor		10,192.75	0.00	10,192.75	
Expense		2,600.00	0.00	2,600.00	
Totals		61,315.25	0.00	61,315.25	

Project 7345 Rhode Island EERMC - 2020 Invoice 6954

Billing Backup

Wednesday, February 19, 2020

Optimal Energy Inc.

Invoice 6954 Dated 1/31/2020

8:36:03 AM

Phase 001 Policy & Strategy

Optimal Staff

			Hours	Rate	Amount
Belliveau, Eric	1/3/2020		1.00	195.00	195.00
		check in on PUC items, weigh in on MMBTu, disc with MG on 2020 planning			
Belliveau, Eric	1/6/2020		1.00	195.00	195.00
		varous topics including tech session, potential study and target setting			
Belliveau, Eric	1/10/2020		1.50	195.00	292.50
		call with SRoss on Q1 planning for target setting presentation, work on language for same.			
Belliveau, Eric	1/13/2020		1.25	195.00	243.75
		continued work on target setting slide, disc with SR, finalize			
Belliveau, Eric	1/23/2020		1.25	195.00	243.75
		various planning discussions with MG - target setting, signiificant changes to savings and introduction of demand management			
Guerard, Michael	1/2/2020		2.75	195.00	536.25
		Prep and coord team for upcoming January mtgs - Tech session, EERMC, Grid; MPS updates			
Guerard, Michael	1/3/2020		3.75	195.00	731.25
		MPS documents review, team coord., send section to PUC staff - T.Bianco; 2020 planning			
Guerard, Michael	1/6/2020		3.50	195.00	682.50
		1-1 member call - J.Garlick; prep calls for PUC tech session, prep; respond to OER data request			
Guerard, Michael	1/7/2020		4.75	195.00	926.25
		Final review/edit to letter to PUC requesting Tech sessions for OER; 1-1 mtg w council member Roberts, prep and follow-up tasks; PUC Tech session prep			
Guerard, Michael	1/8/2020		5.25	195.00	1,023.75
		PUC Tech session, prep and debriefs			
Guerard, Michael	1/10/2020		.50	195.00	97.50
		PST/AMF chk-in w CG			
Guerard, Michael	1/13/2020		4.50	195.00	877.50
		Mtg w PUC staff on EE planning process; EERMC materials coordination with team			
Guerard, Michael	1/14/2020		7.00	195.00	1,365.00
		1-1 mtg w Hubbard, prep; OER/C-Team/DPUC chk-in call; Develop/review/finalize/send EERMC's PPTs			
Guerard, Michael	1/15/2020		3.25	195.00	633.75
		Quick follow-up with PUC staff on EERMC meeting; Update w P.Case; additional prep with team for EERMC meeting			
Guerard, Michael	1/16/2020		8.00	195.00	1,560.00
		EERMC mtg, and follow-up tasks; prep mtg w Butch; call w/ Grid/OER on gas bill impact process/tasks; NEEP update			

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Project	7345	Rhode Island EERMC - 2020			Invoice	6954
Guerard, Michael		1/22/2020	6.00	195.00		1,170.00
	PIMS tech session at PUC					
Guerard, Michael		1/24/2020	3.50	195.00		682.50
	Review MPS docs from Dunsky, team chk-in; Draft outline of Targets memo to EERMC					
Guerard, Michael		1/29/2020	1.00	195.00		195.00
	Potential study updates					
Guerard, Michael		1/30/2020	6.50	195.00		1,267.50
	EERMC Ex-Comm mtg, prep and follow-up tasks; Coord w team to adjust MPS mtg scheds based on stakeholder requests; review 3yr plan outline and Term sheet w MK					
Guerard, Michael		1/31/2020	3.75	195.00		731.25
	SRP stds update mtg @ OER, prep; Updates on MPS; send subcccontractor assignments for 2020					
Johnson, Craig		1/6/2020	3.75	150.00		562.50
	PUC Technical Session Coordination call, prep data and thoughts for how targets translate into plans.					
Johnson, Craig		1/7/2020	2.25	150.00		337.50
	PUC Technical Session on LCP, targets, plans, and budgets. Meeting prep and debrief.					
Johnson, Craig		1/15/2020	2.00	150.00		300.00
	SRP TWG meeting. Meeting prep and debrief.					
Kravatz, Mark		1/6/2020	1.25	185.00		231.25
	Mtg: C&I Sector Planning with Mona and Adam;					
Kravatz, Mark		1/9/2020	2.50	185.00		462.50
	Mtg: C&I Sector; Mtg: Grid and One-Touch Healthy Housing					
Kravatz, Mark		1/10/2020	5.25	185.00		971.25
	Mtg: Technical Working Group; Mtg; Strategy/Planning with Mike G. Task: Review Three-year plan template					
Kravatz, Mark		1/13/2020	3.75	185.00		693.75
	Mtg: Todd and Jonathan from the PUC; Mtg: Mike re: mtg with PUC; Correspondence: John R. Re: MF Deep Dive;					
Kravatz, Mark		1/14/2020	1.50	185.00		277.50
	Mtg: check-in with Becca and Mike; Mtg: bi-weekly check-in with OER;					
Kravatz, Mark		1/15/2020	2.00	185.00		370.00
	Mtg: RI Alliance for Healthy Homes presentation on heating electrification; Task: prep electrification slides for RIAHH meeting;					
Kravatz, Mark		1/16/2020	2.75	185.00		508.75
	Mtg: IES Program Deep-Dive; Task: Scheduling MF Deep Dive;					
Kravatz, Mark		1/17/2020	3.75	185.00		693.75
	Task: Review EERMC Council meeting topics doc; Task: Final touches on RI File system; Mtg: Debriefing w/ RI team on file system structure;					
Kravatz, Mark		1/20/2020	.75	185.00		138.75
	Mtg: Mona and Adam; Correspondence Dave MacLellan re: IES Program data;					
Kravatz, Mark		1/22/2020	1.00	185.00		185.00
	Mtg: Res Sector C-Team Prep;					
Kravatz, Mark		1/24/2020	1.50	185.00		277.50
	Mtg: RI EM&V Deep Dive					
Kravatz, Mark		1/27/2020	5.50	185.00		1,017.50

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Project	7345	Rhode Island EERMC - 2020	Invoice	6954
		Task: RI Res Sector Memo Development; Mtg: Laura Rodormer re: Res Sector Planning; Task: Review IES program Gantt; Task: update Res sector calendar;		
Kravatz, Mark	1/28/2020	3.00	185.00	555.00
		Task: Finalize res sector memo; Mtg: Laura R. to review res sector memo;		
Kravatz, Mark	1/29/2020	5.00	185.00	925.00
		Task: update and finalize Res sector memo; Mtg: Dave MacLellan re IES Program data; Task: Prep for Res Sector Call; Mtg: Res Sector; Mtg: OER and C-Team re: Moderate Income planning;		
Kravatz, Mark	1/30/2020	3.75	185.00	693.75
		Mtg: Mike and Mark Check-in/Strategic Planning; Mtg: EERMC ExCom;		
Kravatz, Mark	1/31/2020	.75	185.00	138.75
		Task: Review Three-year plan template;		
	Totals	122.00		22,990.00
	Total Labor			22,990.00
			Total this Phase	\$22,990.00

Phase 002 Cyclical Planning & Reporting

Optimal Staff

		Hours	Rate	Amount
Caesar, Adrian	1/14/2020	3.00	130.00	390.00
	OER data request and call			
Caesar, Adrian	1/15/2020	4.00	130.00	520.00
	Cross-jurisdiction EE/renewable customer financing comps			
Caesar, Adrian	1/16/2020	3.50	130.00	455.00
	NE efficiency/renewables financing comps			
Caesar, Adrian	1/29/2020	4.25	130.00	552.50
	Cross jurisdiction EE/renewable financing research - summary document drafting			
Chant, Elizabeth	1/21/2020	.25	195.00	48.75
	email and scheduling for meeting on LMI initiative			
Chant, Elizabeth	1/29/2020	1.00	195.00	195.00
	prep for and meet on financing for moderate-income ratepayers			
Guerard, Michael	1/6/2020	1.00	195.00	195.00
	2020 data system/processes tasks w/ SR/CJ			
Guerard, Michael	1/7/2020	1.75	195.00	341.25
	Team mtg on upcoming tasks and data requests: OER/PIMs, TEC-RI anaysis, EERMC mtg prep/materials; coordinate upcoming meetings with team, TEC-RI			
Guerard, Michael	1/10/2020	4.25	195.00	828.75
	EE TWG, prep and debriefs; follow-up not to M.Baer/RIIB			
Guerard, Michael	1/15/2020	3.75	195.00	731.25
	SRP monthly meeting; Research on Behavioral programs, POWER presentation			
Guerard, Michael	1/17/2020	1.75	195.00	341.25
	Coordination and review of financing memo, data needs			
Guerard, Michael	1/21/2020	1.75	195.00	341.25
	C&I strategy mtg sceduling and agenda discussion with team; chk-in on Aquidneck gas constraint options			

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Project	7345	Rhode Island EERMC - 2020			Invoice	6954
Guerard, Michael		1/23/2020	2.25	195.00		438.75
		C&I BP research; check-in w A.Jacobs				
Guerard, Michael		1/29/2020	2.00	195.00		390.00
		Rez Sector Team call w Grid, prep				
Jacobs, Adam		1/3/2020	.50	185.00		92.50
		-review Purpose Energy website shared by John Karlin; connect w/ OER on state-level support for RNG				
Jacobs, Adam		1/6/2020	1.25	185.00		231.25
		-C&I sector planning call w/ Mona and Mark				
		-notes for rest of calendar year C&I sector calls				
Jacobs, Adam		1/7/2020	1.75	185.00		323.75
		-check-in w/ Mike and Rachel on 2020 schedule for EERMC, CHP				
		-check-in w/ Craig on quarterly reports/data timeline				
		-draft C&I sector meetings schedule for 2020				
Jacobs, Adam		1/8/2020	1.00	185.00		185.00
		-send out C&I sector call topics				
		-prep call for C&I sector call w/ C-Team				
Jacobs, Adam		1/9/2020	1.00	185.00		185.00
		-C&I sector team call				
Jacobs, Adam		1/10/2020	2.00	185.00		370.00
		-review C&I lighting call agenda				
		-update to C&I sector schedule and confirm check-in call time w/ Mona to finalize next week				
		-RI lighting call				
Jacobs, Adam		1/15/2020	.25	185.00		46.25
		-reschedule call w/ Mona				
Jacobs, Adam		1/16/2020	.25	185.00		46.25
		-Luminaire Level Lighting Controls marketing materials for Grid use emails w/ NEEA				
Jacobs, Adam		1/17/2020	3.25	185.00		601.25
		-check-in on C&I schedule/agenda w/ Mona				
		-distribution of invites to C&I sector team staff				
		-RI document management meeting				
Jacobs, Adam		1/20/2020	.75	185.00		138.75
		-feedback on RI Heat Pump Market Assessment SOW				
		-discussion of staffing and work plan for consultant C&I sector team				
Jacobs, Adam		1/21/2020	2.00	185.00		370.00
		-Heat pump assessment SOW follow-ups on proposed baselines				
		-reschedule planning call w/ Mona				
		-joint EM&V Res/CI call prep				
Jacobs, Adam		1/22/2020	3.00	185.00		555.00
		-EM&V call				
		-RI heat pump scenrios internal team discussion				
		-check-in w/ Mark				
Jacobs, Adam		1/23/2020	1.25	185.00		231.25
		-2020 EERMC calendar review for C&I planning calls				
		-HP baseline systems review				
		-check-in w/ Mike				
Jacobs, Adam		1/24/2020	1.25	185.00		231.25
		-EM&V deep dive				
Jacobs, Adam		1/28/2020	1.00	185.00		185.00

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Project	7345	Rhode Island EERMC - 2020			Invoice	6954
		-check-in w/ Craig on C&I data review process -check-in w/ Mona on 3YP process and timeline				
Jacobs, Adam		1/29/2020	.75	185.00		138.75
Jacobs, Adam		-check in w/ Mike on planning process -review of draft Res sector team monthly survey	1.00	185.00		185.00
Johnson, Craig		1/7/2020	.50	150.00		75.00
		Sector teams - check-in w/ Adam on C&I team meeting schedule and timing of data sharing. Data Analysis - Work on Becca's request for data on historical perspective of NGrid performance incentive metrics, emails about the same.				
Johnson, Craig		1/8/2020	5.50	150.00		825.00
		Sector teams - C&I sector team check-in prep call.				
Johnson, Craig		1/10/2020	4.00	150.00		600.00
		Data Analysis - Work on Becca's request for data on historical perspective of NGrid performance incentive metrics. Emails about the same.				
Johnson, Craig		1/13/2020	.50	150.00		75.00
		Data Analysis - Review Becca's comments on analysis of historical perspective of NGrid performance incentive metrics.				
Johnson, Craig		1/14/2020	2.00	150.00		300.00
		Data Analysis - Review Becca's comments on request for data on historical perspective of NGrid performance incentive metrics. Discuss approach with Sam, Adrian, and Becca. Continued work on analysis. Emails about the same. Council website - post meeting materials. Update evaluation studies page with recently completed one-page memo.				
Johnson, Craig		1/16/2020	4.00	150.00		600.00
		Council Website - post meeting materials. Sector Teams - request 2019 year-end data from Residential and C&I teams. Data Analysis - Follow up with Becca on next steps for performance incentive metrics data request.				
Johnson, Craig		1/24/2020	.50	150.00		75.00
		EM&V Deep Dive Call.				
Johnson, Craig		1/28/2020	.75	150.00		112.50
		Sector Teams - discussion C&I team questions tracker and data timelines with Adam.				
Johnson, Craig		1/29/2020	.75	150.00		112.50
		Data Request - Respond to Becca's question about when NGrid began offering incentives for heat pumps. Sector Teams - Residential sector team meeting.				
Johnson, Craig		1/30/2020	1.25	150.00		187.50
		Council Website - Post ExCom meeting materials to Council website. EERMC Annual Report - review previous years' reports and prep thoughts about report improvements. Check-in call to discuss timeline and assignments for 2020 EERMC report.				
Johnson, Craig		1/31/2020	.50	150.00		75.00
		Sector Team - review and compile C&I sector team questions. Check-in call w/ Adam about the same.				
Kravatz, Mark		1/2/2020	.50	185.00		92.50
		Mtg: Check-in with Mike G.; Mtg: Mike re: PUC Tech Session; Task: reschedule Garlick mtg				

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Project	7345	Rhode Island EERMC - 2020			Invoice	6954
Kravatz, Mark		1/3/2020	1.00	185.00		185.00
		Coffee; Kravatz and AnderBois re: Nature Conservancies's engagement with EE;				
Kravatz, Mark		1/16/2020	3.75	185.00		693.75
		Mtg: EERMC; Task: Review of Three-year plan template;				
Ross, Samuel		1/6/2020	4.25	185.00		786.25
		RI MPS Inputs review, invoice review, intern prep, PUC hearing prep				
Ross, Samuel		1/7/2020	4.50	185.00		832.50
		Review misc MPS dox from Dunsky for feedback, puc prep				
Ross, Samuel		1/8/2020	7.00	185.00		1,295.00
		PUC Hearing; Data request development; nat gas rate and bill doc review				
Ross, Samuel		1/9/2020	1.75	185.00		323.75
		MPS Call, prep, follow up				
Ross, Samuel		1/10/2020	1.75	185.00		323.75
		RI EERMC Presentation initial discussion and prep, work plan sharing disc.				
Ross, Samuel		1/13/2020	5.25	185.00		971.25
		Council meeting slide prep				
Ross, Samuel		1/14/2020	3.75	185.00		693.75
		LMI Finance Reading; RI Data request work; work plan sharing follow up				
Ross, Samuel		1/16/2020	7.00	185.00		1,295.00
		Nat gas call; Council Meeting & follow up				
Ross, Samuel		1/22/2020	1.75	185.00		323.75
		RI MPS Check In Call; res financing outreach; URI energy fellows documentation				
Ross, Samuel		1/28/2020	1.00	185.00		185.00
		Dunsky Dec. invoice review and tracker update				
Ross, Samuel		1/29/2020	2.00	185.00		370.00
		LMI Finance, Potential Study results presentation prep				
		Totals	122.25			21,293.75
		Total Labor				21,293.75
					Total this Phase	\$25,446.25

Phase	003	EERMC Oversight - EMV			
Optimal Staff					
			Hours	Rate	Amount
Guerard, Michael		1/2/2020	.50	195.00	97.50
		Review EE study billing analysis memo from Ralph			
Guerard, Michael		1/9/2020	.75	195.00	146.25
		EE Study conf. call			
Guerard, Michael		1/17/2020	1.00	195.00	195.00
		Review Grid's gas bill impact proposed options;			
Guerard, Michael		1/21/2020	.75	195.00	146.25
		HP EMV study review, team coord.			
Guerard, Michael		1/24/2020	2.75	195.00	536.25
		EMV Deep Dive ConCall, prep and debriefs			
Kravatz, Mark		1/2/2020	.25	185.00	46.25
		Task: Review Ralph's comments on legislative evaluation billing analysis;			

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Project	7345	Rhode Island EERMC - 2020			Invoice	6954
Kravatz, Mark		1/3/2020	.25	185.00		46.25
	Comments: C&I Custom Electric study;					
Kravatz, Mark		1/9/2020	1.50	185.00		277.50
	Task: Review materials for legislative study working group meeting; Mtg: Legislative Study Working Group;					
Kravatz, Mark		1/13/2020	1.00	185.00		185.00
	Correspondence: Adam W. and team Re: Sense Study comments; Task: Scheduling EM&V deep dive; Task: comments on Gas Impact Study; Task Review One-Pager;					
Kravatz, Mark		1/14/2020	.25	185.00		46.25
	Task: Schedule EMV Deep Dive;					
Kravatz, Mark		1/16/2020	.25	185.00		46.25
	Task: comments for Sense Evaluation;					
Kravatz, Mark		1/20/2020	.25	185.00		46.25
	Task: comments on heat pump installation scenarios;					
Kravatz, Mark		1/22/2020	.50	185.00		92.50
	Mtg: RI EM&V Monthly					
		Totals	10.00			1,907.50
		Total Labor				1,907.50
					Total this Phase	\$7,947.75

Phase 004 EERMC Oversight - Education/Stakeholders

Optimal Staff

			Hours	Rate	Amount
Guerard, Michael		1/3/2020	.50	195.00	97.50
	Review Annual Report timeline, process				
Guerard, Michael		1/8/2020	.50	195.00	97.50
	Debrief on Education call w team				
Guerard, Michael		1/17/2020	1.50	195.00	292.50
	URI pub ed poropsal review/feedback; prep for upcoming communications mtgs				
Guerard, Michael		1/29/2020	1.00	195.00	195.00
	Partnership call w NEEP, OER, Grid				
Guerard, Michael		1/30/2020	.75	195.00	146.25
	ConCall on Annual Report				
Guerard, Michael		1/31/2020	2.25	195.00	438.75
	EERMC member ed/orientation mtg w Sholly/Kravatz; 2020 tasks review with Sholly				
Kravatz, Mark		1/2/2020	.25	185.00	46.25
	Correspondence: Rachel re: EERMC member education and Communication Committee Agenda				
Kravatz, Mark		1/9/2020	2.50	185.00	462.50
	Mtg: EERMC Member Verengia for Ion1; Mtg: EERMC Member Fagan for Ion1;				
Kravatz, Mark		1/13/2020	.25	185.00	46.25
	Correspondence: EERMC member Hubbard re; scheduling 1 on 1s.				

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Project	7345	Rhode Island EERMC - 2020			Invoice	6954
Kravatz, Mark		1/14/2020	1.75	185.00	323.75	
		Mtg: EERMC Member Hubbard 1on1; Task: review EERMC member education materials sent from Rachel S.				
Kravatz, Mark		1/31/2020	1.00	185.00	185.00	
		Mtg: Rachel S. Re: EERMC Member Onboarding educational curriculum;				
		Totals	12.25		2,331.25	
		Total Labor				2,331.25
				Total this Phase		\$4,931.25
				Total this Project		\$61,315.25
				Total this Report		\$61,315.25

George Lawrence, Caerbannog Consulting
3540 Mountain Rd
Addison VT 05491

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 3
Invoice Date: February 3, 2020
OEI Project #: 7345

Work Performed for the RI EERMC project

Description of Services		Amount	
Services Performed mm/dd/yy through mm/dd/yy			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	8.25	\$185.00	\$1,526.25
LABOR - Travel Hours	0.00	\$92.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$1,526.25</u>

George Lawrence, Caerbannog Consulting
Services Performed 01/01/20 to 01/31/2020

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
1/2/20	Emails regarding recurring meetings			0.25			0.25	0.00	0.25
1/8/2020	Consultant team Prep call			0.75			0.75	0.00	0.75
1/9/2020	Call with National Grid			0.75			0.75	0.00	0.75
1/10/2020	1 hr Lighting call with National Grid, .75 hr follow up			1.75			1.75	0.00	1.75
1/13/2020	Follow up on Luminaire Level lighting controls info			0.50			0.50	0.00	0.50
1/14/2020	2020 Workplan hours			0.25			0.25	0.00	0.25
1/15/2020	Review changes to Piggybacking report			0.50			0.50	0.00	0.50
1/16/2020	.75 hr E-mails regarding use of NEEA LLLC toolkit documents			0.75			0.75	0.00	0.75
1/21/2020	Review updated SOW for RI Heat Pump Market Assessment Study			1.50			1.50	0.00	1.50
1/23/2020	additional discussion of RI Heat pump market assessment			0.50			0.50	0.00	0.50
1/28/2020	Review #1 update from Grid, submit questions			0.75			0.75	0.00	0.75
							0.00	0.00	0.00
	Total hours	0.00	0.00	12.25	0.00	0.00	12.25	0.00	12.25
	Total Amount	\$0.00	\$0.00	\$1,526.25	\$0.00	\$0.00	\$1,526.25	0.00	\$1,526.25

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Invoice

TO: Optimal Energy Inc.
April Clodgo
10600 Route 116, Suite 3
Hinesburg, VT 05461
clodgo@optenergy.com

Invoice #:3853
Invoice Date: 2/12/2020
Invoice Period: 1/1/2020-1/31/2020
Job Name: RI EERMC
Terms: Net 30 Days
PO # 3200362251

Consultant Labor	Job-Phase-Project	Project Description	Rate	Hours	Amount
Dan Mellinger	4104-00-02	Cyclical Planning & Reporting Activities	\$185.00	4.00	\$740.00
Glenn Reed	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	9.75	\$1,901.25
Richard Faesy	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	7.75	\$1,511.25
EFG Labor Subtotal:				21.50	\$4,152.50

TOTAL DUE THIS INVOICE: \$4,152.50 USD

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:3853
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 1/1/2020-1/31/2020
Consultant: Dan Mellinger

Date	Phase-Project	Project Description	Hours Task Description
1/8/2020	00-02	Cyclical Planning & Reporting Activities	0.50 RI C&I C-team planning call
1/9/2020	00-02	Cyclical Planning & Reporting Activities	1.00 C&I C-team meeting
1/10/2020	00-02	Cyclical Planning & Reporting Activities	1.75 Prep agenda for RI call; hold call with Ngrid and send out follow-up materials
1/28/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Put together RI slide deck on distributor survey results
TOTAL:			4.00

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:3853
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 1/1/2020-1/31/2020
Consultant: Glenn Reed

Date	Phase-Project	Project Description	Hours Task Description
1/9/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Planning process review call w/R. Faesy, prep
1/10/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Review and update regional Plan review/update process document
1/10/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Review of year end Lockheed Martin lighting and appliance data
1/13/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Review and comment on Sense draft survey guide
1/20/2020	00-02	Cyclical Planning & Reporting Activities	0.25 NEMA and ALA lighting standards law suit
1/22/2020	00-02	Cyclical Planning & Reporting Activities	1.00 RI monthly EM&V call
1/22/2020	00-02	Cyclical Planning & Reporting Activities	1.25 RI HP sceanrios
1/22/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Res. Team prep call
1/23/2020	00-02	Cyclical Planning & Reporting Activities	0.25 NEEP Notes HP installation article
1/27/2020	00-02	Cyclical Planning & Reporting Activities	0.25 NEEP HP Buying Guide
1/29/2020	00-02	Cyclical Planning & Reporting Activities	1.75 Res. Sector meeting, prep and follow up
1/30/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Revised Grid reporting: participant satisfqaction surveys and questions for Grid
TOTAL:			9.75

Energy Futures Group, Inc.

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Task Description

Invoice #:3853
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 1/1/2020-1/31/2020
Consultant: Richard Faesy

Date	Phase-Project	Project Description	Hours Task Description
1/2/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Energy labeling with NASEO
1/9/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Review state comparison planning matrix with E. Levin and G. Reed. Update contract.
1/10/2020	00-02	Cyclical Planning & Reporting Activities	2.00 State planning matrix edits, updates, Review Maine's entries with Ian Burnes of EMT.
1/15/2020	00-02	Cyclical Planning & Reporting Activities	0.50 State planning matrix edits, review
1/22/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Prep for then res. consulting team call
1/28/2020	00-02	Cyclical Planning & Reporting Activities	0.50 CERV ventilation system webinar for RNC (split with CT)
1/29/2020	00-02	Cyclical Planning & Reporting Activities	1.75 Prep then call with Res Team and Ngrid
TOTAL:			7.75

Rachel Sholly
48 Hudson Street
Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 25
Invoice Date: January 31, 2020
OEI Project #: 7345

Work Performed for National Grid USA Service Company, Under Purchase Order No.
3200348734

Description of Services		Amount	
Services Performed 1/01/20 through 1/31/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	30.50	\$148.00	\$4,514.00
LABOR - Travel Hours	0.00	\$74.00	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$4,514.00</u>

Rachel Solly
Services Performed 1/01/20 through 1/31/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
1/3/2020	Reviewed MPS emails; Sent feedback reminders; Drafted annual report timeline			1.50			1.50		1.50
1/7/2020	Sent education call agenda & materials; Updated timeline per Becca & sent to Grid; Finished detailed member curriculum outline & sent to Mark; Optimal staff meeting; Touched base w/Mike on tasks & upcoming meetings; Reviewed & commented on NEEP proposal; CHP chat w/Mike & Adam; Sent updated edu agenda & materials			6.00			6.00		6.00
1/8/2020	Consolidated & sent comments on MPS memo & spreadsheets; Education group prep, call & follow-up			3.00			3.00		3.00
1/9/2020	Drafted MPS slides outline; MPS monthly call prep, call & follow-up notes/emails			3.25			3.25		3.25
1/10/2020	Drafted annual report slides for Council mtg			0.75			0.75		0.75
1/14/2020	MPS check-in w/Sam & Mike			0.25			0.25		0.25
1/16/2020	Call on NEEP 2020 Partnership; EERMC meeting			2.50			2.50		2.50
1/22/2020	Scheduling meetings for MPS; Check-in w/Sam; Emails to Dunsky; MPS check-in call; Check-in w/Mike re: Annual Report strategy			2.25			2.25		2.25
1/23/2020	Updated Annual Report timeline & TOC; Sent to group w/scheduling poll; Drafted edu call agenda; Reviewed & sent updated URI proposal; Finalized & sent education call notes			2.00			2.00		2.00
1/24/2020	Drafted needs assessment follow-up strategy			1.00			1.00		1.00
1/28/2020	Sent invite for Annual Report call, Reviewed Becca's ToC edits; Sent reminder for Dunsky-MPSMT in-person mtg, Emailed Dunsky, Sent calendar hold; Sent draft education agenda			1.00			1.00		1.00
1/29/2020	Scheduling & communications w/aren; Call re: Requests for Dunsky Presentation & follow-up; Reviewed NEEP 2019 quarterly reports; Call on NEEP 2020 Partnership			2.75			2.75		2.75
1/30/2020	Prep & call on 2020 Annual Report; Call w/Mike, Potential Study scheduling			1.25			1.25		1.25
1/31/2020	Prep & mtg w/Mike & Mark re: education; EERMC agenda review & general check-in w/Mike; Potential study scheduling & communications			3.00			3.00		3.00
	Total hours	0.00	0.00	30.50	0.00	0.00	30.50	0.00	30.50
	Total Amount	\$0.00	\$0.00	\$0.5100	\$0.00	\$0.00	\$0.5100	\$0.00	\$0.5100



Invoice

Bill To:

National Grid
Attn: Matthew Ray, Customer Energy Management, RI
280 Melrose Street
Providence, RI 02907

Date	Invoice No.
1/16/2020	MPS-1

Item	Description	Quantity	Rate	Amount
	Market Potential Study Vendor Compensation	1	\$	\$111,340

Total	\$111,340
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Backup Documentation Attached to this Invoice:

Please make all checks payable in U.S.funds to:
State of Rhode Island
Energy Efficiency and Resource Management Council

Please mail all payments and contracts to:
Desautel Law
Attn: Marisa Desautel
38 Bellevue Avenue, Unit H
Newport, RI 02840

Invoice



February 29, 2020
Project No: 7345
Invoice No: 6966

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2020
PO #:

Professional Services from February 1, 2020 to February 29, 2020

Phase 001 Policy & Strategy

Optimal Staff

	Hours	Rate	Amount
Belliveau, Eric	5.50	195.00	1,072.50
Caesar, Adrian	21.25	130.00	2,762.50
Calcagni, Gretchen	4.25	185.00	786.25
Guerard, Michael	77.00	195.00	15,015.00
Jacobs, Adam	17.75	185.00	3,283.75
Johnson, Craig	6.00	150.00	900.00
Kravatz, Mark	29.75	185.00	5,503.75
McDonald, Clifford	18.50	185.00	3,422.50
Mosenthal, Philip	.50	195.00	97.50
Ross, Samuel	25.00	185.00	4,625.00
Totals	205.50		37,468.75
Total Labor			37,468.75

Subcontractors

Ralph Prahl			6,581.25
Total Subcontractors			6,581.25
		Total this Phase	\$44,050.00

Phase 002 Cyclical Planning & Reporting

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020	Invoice	6966
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Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	2.50	130.00	325.00	
Chant, Elizabeth	.25	195.00	48.75	
Guerard, Michael	27.75	195.00	5,411.25	
Jacobs, Adam	1.50	185.00	277.50	
Johnson, Craig	47.50	150.00	7,125.00	
Kravatz, Mark	4.00	185.00	740.00	
Ross, Samuel	61.50	185.00	11,377.50	
Totals	145.00		25,305.00	
Total Labor				25,305.00

Subcontractors

Energy Futures Group, Inc.			2,862.50	
Total Subcontractors			2,862.50	2,862.50
			Total this Phase	\$28,167.50

Phase 003 EERMC Oversight - EMV

Optimal Staff

	Hours	Rate	Amount	
Guerard, Michael	5.75	195.00	1,121.25	
Kravatz, Mark	9.25	185.00	1,711.25	
Totals	15.00		2,832.50	
Total Labor				2,832.50

Subcontractors

Rachel Sholly			3,071.00	
Caerbannog Consulting, LLC			462.50	
Cx Associates LLC			2,242.50	
Total Subcontractors			5,776.00	5,776.00
			Total this Phase	\$8,608.50

Phase 004 EERMC Oversight - Education/Stakeholders

Optimal Staff

	Hours	Rate	Amount	
Guerard, Michael	1.75	195.00	341.25	
Kravatz, Mark	4.50	185.00	832.50	
Totals	6.25		1,173.75	
Total Labor				1,173.75
			Total this Phase	\$1,173.75

Phase 005 Intern

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020	Invoice	6966
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Fixed Fees

Monthly Intern Fee (Feb. 2020)	2,272.73		2,272.73
Total Fixed Fees	2,272.73		2,272.73
	Total this Phase		\$2,272.73

Billing Limits

	Current	Prior	To-Date
Total Billings	84,272.48	61,315.25	145,587.73
Limit			945,000.00
Remaining			799,412.27
		Total this Invoice	\$84,272.48

Project 7345 Rhode Island EERMC - 2020 Invoice 6966

Billing Backup

Tuesday, March 17, 2020

Optimal Energy Inc.

Invoice 6966 Dated 2/29/2020

8:26:17 AM

Phase 001 Policy & Strategy

Optimal Staff

		Hours	Rate	Amount
Belliveau, Eric	2/5/2020	1.50	195.00	292.50
call with MG on PIMS, prep on background				
Belliveau, Eric	2/6/2020	1.00	195.00	195.00
team call - PIMS, Grid issues with staffing, HP and electric heat discussion				
Belliveau, Eric	2/25/2020	2.00	195.00	390.00
review dunsy deck on potential, disc with MG, disc with SR, attend MPS MT meeting, forward applicable MA info on assesement of potential.				
Belliveau, Eric	2/28/2020	1.00	195.00	195.00
potential study discussion and target setting policy and framework				
Caesar, Adrian	2/6/2020	2.50	130.00	325.00
Cross-jurisdictional EE/Renewable financing program comps analysis				
Caesar, Adrian	2/7/2020	3.75	130.00	487.50
financing comps research and memo drafting				
Caesar, Adrian	2/10/2020	2.50	130.00	325.00
Cross jurisdiction financing comps - summary table development and narrative drafting				
Caesar, Adrian	2/11/2020	3.50	130.00	455.00
HEAT loan assessment review, Cross jurisdiction financing comps data analysis and memo drafting				
Caesar, Adrian	2/13/2020	4.25	130.00	552.50
Cross Jurisdictional financing comps memo draft and data analysis				
Caesar, Adrian	2/19/2020	2.50	130.00	325.00
Cross-jurisdiction financing comps memo and analysis				
Caesar, Adrian	2/20/2020	2.25	130.00	292.50
Financing comps memo drafting and data analysis				
Calcagni, Gretchen	2/18/2020	1.00	185.00	185.00
Followed-up with Sam on RI writing task and pulled together materials for memo				
Calcagni, Gretchen	2/20/2020	2.00	185.00	370.00
Pulled together materials for EERMC Memo				
Calcagni, Gretchen	2/23/2020	1.00	185.00	185.00
Pulled together materials for EERMC Memo				
Calcagni, Gretchen	2/24/2020	.25	185.00	46.25
Follow-up with Mike on metrics work				
Guerard, Michael	2/3/2020	4.25	195.00	828.75
MPS Initial results presentation, prep and debriefs				
Guerard, Michael	2/4/2020	3.25	195.00	633.75
Review 3YP SRP Voision from Carrie; Coord w MK on submittal of comments on 3YR Plan outline to Grid				

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Page 4

Project	7345	Rhode Island EERMC - 2020			Invoice	6966
Guerard, Michael		2/5/2020	1.75	195.00		341.25
		PIMs Principles discussion w EB; Coordinatc mtgs with M.Ray/Grid and staff mtgs/agendas				
Guerard, Michael		2/6/2020	3.75	195.00		731.25
		Bi-weekly management call; Work on Potential study				
Guerard, Michael		2/7/2020	1.50	195.00		292.50
		Chk-in call w M.Ray/Grid; review IRs from Division to Grid				
Guerard, Michael		2/10/2020	3.50	195.00		682.50
		Potential study call w MPS MT/Grid, follow-up; prep for week's meetings; coord team activities/tasks				
Guerard, Michael		2/11/2020	2.50	195.00		487.50
		OER/C-Team chk-in mtg, prep and follow-up; planning mtg w MK				
Guerard, Michael		2/12/2020	5.50	195.00		1,072.50
		Multiple meetings and tasks on Potential study 1st draft review; scheduling upcoming mtgs; prep for TWG				
Guerard, Michael		2/13/2020	2.75	195.00		536.25
		Coordination and folow-up on Potential study tasks				
Guerard, Michael		2/14/2020	5.75	195.00		1,121.25
		EE TWG meeting; mtgs on EE/SRP standards w Grid/OER; prep and follow-up; prep for mtg w Division/OER on Gas DR, Stds, Targets				
Guerard, Michael		2/17/2020	3.50	195.00		682.50
		Mtg @ Division w OER on policy issues, prep				
Guerard, Michael		2/19/2020	3.75	195.00		731.25
		Review LCP stds docs from PUC; coord w OER, Grid; geenral prep for EERMC mtg				
Guerard, Michael		2/20/2020	3.25	195.00		633.75
		EERMC mtg prep, materials development				
Guerard, Michael		2/21/2020	1.75	195.00		341.25
		EERMC mtg prep, materials development				
Guerard, Michael		2/24/2020	6.50	195.00		1,267.50
		EERMC mtg prep/docs; coord wi Grid, OER on potential study; updates w sector teams; review Gas bill impact RFP draft				
Guerard, Michael		2/25/2020	4.00	195.00		780.00
		OER/C-Team chk-in mtg, prep; multiple meetings w Dunnsky, MPS MT and internal team on Potential Study/Targets				
Guerard, Michael		2/26/2020	8.00	195.00		1,560.00
		PUC Tech sessions and Standards and Potential Study, prep and debrief with Dunsky				
Guerard, Michael		2/27/2020	7.25	195.00		1,413.75
		EERMC mtg, prep docs and pre-mtgs; debriefs				
Guerard, Michael		2/28/2020	4.50	195.00		877.50
		Debrief mtg w Dunsky and MPS MT; EERMC mtg debriefs with team; next steps planning for targets/stds				
Jacobs, Adam		2/4/2020	1.00	185.00		185.00
		-RI HP market assessment scope review and doodle poll -review of December 2019 C&I data report and distribution of materials for internal prep call for C&I sector meeting				
Jacobs, Adam		2/5/2020	2.00	185.00		370.00
		-C&I EM&V call -consultant team prep call and distribution of materials for C&I sector meeting				

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Project	7345	Rhode Island EERMC - 2020			Invoice	6966
Jacobs, Adam		2/6/2020	4.25	185.00	786.25	
		-C&I sector call + notes and follow-ups -intenal bi-weekly check-in call -call to coordinate scheduling of 1st C&I planning call for 3YP w/ Mona -follow-up w/ Eversource/Grid-MA on railroad heater projects -initial review of PY16 custom electric eval draft report				
Jacobs, Adam		2/7/2020	1.50	185.00	277.50	
		-follow-up w/ C-tream on C&I 2019 cost data analysis -C&I upstream lighting call				
Jacobs, Adam		2/10/2020	.50	185.00	92.50	
		-schedule 1st C&I 3YP meeting -review PY16 custom electric report				
Jacobs, Adam		2/11/2020	.75	185.00	138.75	
		-follow-up on strategic electrification SOW -review of strategic electrification ccASHP solar installer survey, ccASHP customer survey -schedule call w/ Craig on C&I data needs for initial 3YP meeting				
Jacobs, Adam		2/12/2020	2.75	185.00	508.75	
		-finish review of RI strategic electrification survey -draft notes/comments and send to Cadmus -call to discuss strategic electrification scenarios options w/ Cadmus				
Jacobs, Adam		2/13/2020	2.00	185.00	370.00	
		-check-in w/ Mark on workforce development report from MA, efforts in RI -RI C&I data analysis for 2019 year-end and check-in call w/ team to discuss major trends/plan for Feb 24 call w/ Grid				
Jacobs, Adam		2/14/2020	1.25	185.00	231.25	
		-submit comments on PY16 custom electric eval -HP market survey comment summary to rest of C-team -cross state coordination call (1/2 time) -C&I data prep review w/ Craig for 3YP meeting w/ Grid				
Jacobs, Adam		2/17/2020	.25	185.00	46.25	
		-C&I data for NGrid 3YP meeting				
Jacobs, Adam		2/18/2020	.50	185.00	92.50	
		-RI market characterization draft review -RI heating sector transformation workshop presentation review				
Jacobs, Adam		2/24/2020	.50	185.00	92.50	
		-C&I Q4 data updates check-in w/ Craig -cross state data coordination (1/2 call)				
Jacobs, Adam		2/26/2020	.50	185.00	92.50	
		-follow-up w/ Grid on rescheduling C&I planning meeting				
Johnson, Craig		2/4/2020	.50	150.00	75.00	
		Prep for meeting with energy storage expert Jeremy Twitchell with Mike and Sam.				
Johnson, Craig		2/6/2020	3.50	150.00	525.00	
		C-Team EERMC internal check-in meeting; Meeting with energy storage expert Jeremy Twitchell along with Carrie from OER. Review residential potential study results.				
Johnson, Craig		2/11/2020	1.00	150.00	150.00	
		Review Market Potential Study results, emails about the same.				
Johnson, Craig		2/14/2020	1.00	150.00	150.00	
		SRP Standads call.				

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Project	7345	Rhode Island EERMC - 2020			Invoice	6966
Kravatz, Mark		2/5/2020	.25	185.00		46.25
		Correspondence: John Richards re: Workforce Deep Dive;				
Kravatz, Mark		2/6/2020	1.50	185.00		277.50
		Mtg: Bi-weekly C-Team Strategic Planning; Correspondence: Mike and Sam re: "Butch Analysis"; Correspondence: Adam and Craig re: Sector Team Analysis;				
Kravatz, Mark		2/11/2020	2.25	185.00		416.25
		Mtg: OER and DPUC for EERMC check-in; Mtg: Mike to discuss RI Plans & Strategy;				
Kravatz, Mark		2/13/2020	3.50	185.00		647.50
		Mtg: Becca to discuss Deep dive meeting expectations and plans; Mtg: Heating Sector Transformation;				
Kravatz, Mark		2/14/2020	4.25	185.00		786.25
		Mtg: RI Technical Working Group; Task: Schedule MF deep dive with John Richards; Task: Res Sector Meeting Planning (Calendar, reporting, etc.)				
Kravatz, Mark		2/18/2020	.75	185.00		138.75
		Mtg: w/ John Richards to review/discuss MF deep dive slides; Schedule: Workforce deep dive;				
Kravatz, Mark		2/19/2020	2.00	185.00		370.00
		Mtg: MF Deep Dive;				
Kravatz, Mark		2/20/2020	4.50	185.00		832.50
		Task: Review/Edit memos and presentations for EERMC meeting; Task: REs Sector Call Planning				
Kravatz, Mark		2/21/2020	4.00	185.00		740.00
		Mtg: Quarterly RI IES Program Best Practices;				
Kravatz, Mark		2/25/2020	1.25	185.00		231.25
		Mtg: OER and DPUC for EERMC check-in;				
Kravatz, Mark		2/26/2020	1.00	185.00		185.00
		Mtg: w/ Grid, OER and C-team to discuss IES Program status;				
Kravatz, Mark		2/27/2020	4.50	185.00		832.50
		Check in on Grid's HVAC meeting (check-in with Laura); Mtg: EERMC;				
McDonald, Clifford		2/6/2020	3.50	185.00		647.50
		Look into AESC numbers/rate calculator avoided costs				
McDonald, Clifford		2/12/2020	3.75	185.00		693.75
		Potential study draft results review and comments				
McDonald, Clifford		2/13/2020	4.50	185.00		832.50
		Rate impact review and memo				
McDonald, Clifford		2/21/2020	2.00	185.00		370.00
		rate impact model review and discussion				
McDonald, Clifford		2/25/2020	1.75	185.00		323.75
		Rate impact memo and research				
McDonald, Clifford		2/26/2020	3.00	185.00		555.00
		Rate impact memo edits				
Mosenthal, Philip		2/26/2020	.50	195.00		97.50
		rate impacts rev.				
Ross, Samuel		2/4/2020	1.75	185.00		323.75
		storage expert meeting prep; rate and bill impacts model review planning				
Ross, Samuel		2/5/2020	2.00	185.00		370.00
		review of finance prgm jurisdictional comps memo, edits and next steps re: same				
Ross, Samuel		2/9/2020	3.00	185.00		555.00

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020		Invoice	6966
		Heating electrification research			
Ross, Samuel		2/10/2020	5.50	185.00	1,017.50
		potential study market data walk through; electrification research; rate and bill impacts; financing check in			
Ross, Samuel		2/11/2020	2.00	185.00	370.00
		C-Team check-in			
Ross, Samuel		2/12/2020	6.00	185.00	1,110.00
		RI Intern project initiation; DNV-GL data issue initial discussion; in depth MPS discussion, prep and follow up re: same			
Ross, Samuel		2/13/2020	4.75	185.00	878.75
		continued baseline data review, calls and follow up re: same; finalizing MPS feedback for Dunskey team			
		Totals	205.50		37,468.75
		Total Labor			37,468.75
				Total this Phase	\$44,050.00

Phase 002 Cyclical Planning & Reporting

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian		2/18/2020	2.50	130.00	325.00
		Grid Budget spreadsheet analysis, 2019 Plan vs. Actuals comparisons, 2020 Plan commitments data review			
Chant, Elizabeth		2/4/2020	.25	195.00	48.75
		info to Guerard on qualities and issues with different delivery models			
Guerard, Michael		2/4/2020	3.00	195.00	585.00
		Review/edit Term sheet draft; MPS updates			
Guerard, Michael		2/5/2020	1.25	195.00	243.75
		CI team prep call; team correspondence on MA move away from NEEP HP standard			
Guerard, Michael		2/6/2020	1.25	195.00	243.75
		Prep for DEEP Dive topics, BP research			
Guerard, Michael		2/10/2020	1.00	195.00	195.00
		Discussion w Grid/OER on rez financing, debriefs w SR			
Guerard, Michael		2/12/2020	1.00	195.00	195.00
		Set up C&I data / plan review tasks for team			
Guerard, Michael		2/17/2020	.50	195.00	97.50
		Review Grid submittal to PUC on fuel switching motion; r			
Guerard, Michael		2/18/2020	4.00	195.00	780.00
		Review MF PPT from Grid for Deep Dive mtg; Review files from Division on data schedules, coordinate with team on next steps; Review updated C&I data sent by Ben/Grid; chk-in on upcoming sector mtg agendas			
Guerard, Michael		2/19/2020	4.00	195.00	780.00
		MF Deep dive call, prep and debrief w team			
Guerard, Michael		2/20/2020	2.50	195.00	487.50
		Review draft of Financing Memo; coord w MK on IE BP mtg input; review follow-up MF Deep Dive materials from JR/Grid			

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020			Invoice	6966
Guerard, Michael		2/21/2020	3.75	195.00		731.25
		Review Grid's Q4 report, follow-up analysis w CJ; Review Grid PUC responses on EBF				
Guerard, Michael		2/25/2020	2.25	195.00		438.75
		Update on rez lighting w team; Review IES BP PPT; data review on IES w team				
Guerard, Michael		2/26/2020	1.75	195.00		341.25
		IE S call w Grid, CR, OER, prep and debrief w MK				
Guerard, Michael		2/27/2020	.75	195.00		146.25
		Mtg w Grid on IE; mtg w Tony and MK on IE issues				
Guerard, Michael		2/28/2020	.75	195.00		146.25
		Coordinate scheduling on rez/C&I/finance for early March				
Jacobs, Adam		2/19/2020	1.25	185.00		231.25
		-C&I sector planning call questions consolidation and distribution to meeting attendees				
Jacobs, Adam		2/21/2020	.25	185.00		46.25
		-workforce dev meeting scheduling				
Johnson, Craig		2/3/2020	.25	150.00		37.50
		Meet and greet with EERMC intern.				
Johnson, Craig		2/4/2020	3.00	150.00		450.00
		Sector Teams - re-view C&I year-end data and compile data report. Discuss year-end data with Adam.				
Johnson, Craig		2/5/2020	.75	150.00		112.50
		Sector Teams - Check-in call with internal C&I team.				
Johnson, Craig		2/6/2020	2.25	150.00		337.50
		Sector Teams - Year-end data review, emails about the same. C&I sector team meeting, including meeting prep and debrief.				
Johnson, Craig		2/10/2020	4.50	150.00		675.00
		Sector Teams - Year-end data review. Analysis - Establish historical trend of portfolio savings from lighting to help inform updates to the market potential study.				
Johnson, Craig		2/11/2020	1.00	150.00		150.00
		Sector Teams - Review year-end data				
Johnson, Craig		2/12/2020	5.50	150.00		825.00
		Sector Teams - Review year-end data. Develop updates and enhancements to data tracker. Review C&I commitment tracker task with Brian.				
Johnson, Craig		2/13/2020	6.75	150.00		1,012.50
		Sector Teams - Review year-end data. Develop updates and enhancements to data tracker. Discuss year-end data with Mike, Adam, and Jen.				
Johnson, Craig		2/14/2020	3.00	150.00		450.00
		Sector Teams - Review year-end data. Develop updates and enhancements to data tracker. Discuss year-end data with Adam.				
Johnson, Craig		2/18/2020	1.00	150.00		150.00
		Sector Teams - Review residential multifamily year-end data. Discussion with Mike about share of savings from lighting vs. non-lighting.				
Johnson, Craig		2/19/2020	3.00	150.00		450.00
		Multifamily Deep Dive Call. SRP TWG meeting, meeting prep and debrief.				
Johnson, Craig		2/20/2020	2.25	150.00		337.50

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Project	7345	Rhode Island EERMC - 2020		Invoice	6966
		Website - post meeting materials to website. Council Meeting Prep - develop summary of recent SRP meetings for memo to Council. Sector Teams - develop and distribute data sharing deadlines.			
Johnson, Craig	2/21/2020	.75	150.00		112.50
		Website - post meeting materials to website. Data - Review NGrid Q4 report and results.			
Johnson, Craig	2/24/2020	7.25	150.00		1,087.50
		Data - Review NGrid Q4 results. Update year-end data analysis and review with updated Q4 data. Additional analysis on C&I and multifamily specific concerns. Website - post meeting materials to website.			
Johnson, Craig	2/25/2020	4.50	150.00		675.00
		Website - post meeting materials to website. Data - review year-end data and compare year-end data with Q4 results. Flag questions. Sector teams - set up systems for data tracking in 2020.			
Johnson, Craig	2/26/2020	.25	150.00		37.50
		Website - post meeting materials to website.			
Johnson, Craig	2/27/2020	1.50	150.00		225.00
		Data - Review IES data, compare planned budget and spending vs. actuals. Discussion w/ Mark about the same. Website - post meeting materials.			
Kravatz, Mark	2/3/2020	3.50	185.00		647.50
		Task: Review/Comments on Three-Year Plan Structure;			
Kravatz, Mark	2/5/2020	.50	185.00		92.50
		Mtg: Preliminary discussion on potential study results;			
Ross, Samuel	2/3/2020	3.75	185.00		693.75
		prep for, MPS draft results presentation			
Ross, Samuel	2/5/2020	6.00	185.00		1,110.00
		MPS draft results review; call & follow up re: same			
Ross, Samuel	2/6/2020	9.00	185.00		1,665.00
		MPS review; calls and discussions re: same; finance research			
Ross, Samuel	2/7/2020	9.00	185.00		1,665.00
		MPS review, calls and discussions re: same; biweekly check in; Energy storage meeting and discussion			
Ross, Samuel	2/14/2020	4.50	185.00		832.50
		EE TWG meeting, prep, follow-up			
Ross, Samuel	2/21/2020	6.00	185.00		1,110.00
		Potential study presentations prep, feedback to Dunsky; rate and bill impacts work and call with Grid; finance research check-in and next steps planning			
Ross, Samuel	2/25/2020	4.00	185.00		740.00
		EERMC, PUC slide deck review, calls re: same, coordination re: other deliverables			
Ross, Samuel	2/26/2020	4.00	185.00		740.00
		PUC hearing, prep for council meeting			
Ross, Samuel	2/27/2020	10.25	185.00		1,896.25
		RI EERMC council meeting, prep for same, follow ups			

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Project	7345	Rhode Island EERMC - 2020			Invoice	6966
Ross, Samuel		2/28/2020	5.00	185.00	925.00	
		RI intern catch-up; potential study presentations debrief meeting, prep & follow-up re: same				
		Totals	145.00		25,305.00	
		Total Labor				25,305.00
				Total this Phase		\$28,167.50

Phase 003 EERMC Oversight - EMV

Optimal Staff

			Hours	Rate	Amount
Guerard, Michael	2/3/2020	Team coord and review comments on HP Assessment Study	1.25	195.00	243.75
Guerard, Michael	2/5/2020	Monthly CI EMV call, prep; follow-up discussions on performance of DNVGL	1.25	195.00	243.75
Guerard, Michael	2/7/2020	Review SEM EMV SOW; follow-up on DNVGL and data needs for MPS	1.00	195.00	195.00
Guerard, Michael	2/18/2020	Review C&I baseline report, follow-up with team on next steps	1.75	195.00	341.25
Guerard, Michael	2/24/2020	Update on custom elec EMV; review jobs study project statement	.50	195.00	97.50
Kravatz, Mark	2/4/2020	Correspondence: Ralph PrahI re: Heat Pump Market Study; Task: Update EM&V Studies Filing system;	1.75	185.00	323.75
Kravatz, Mark	2/5/2020	Task: Draft agenda for EM&V mtg; Mtg: C&I EM&V Monthly Meeting; Correspondence/Mtg. w/ Mike and Ralph re: policy for late studies;	1.75	185.00	323.75
Kravatz, Mark	2/6/2020	Correspondence: Ben Crosby re: protocol for C-team responses to the SEM demo study; Correspondance w/ Adam re: EM&V team protocols/expectations;	.50	185.00	92.50
Kravatz, Mark	2/10/2020	Task: Correspondence w/ Ralph re several EM&V studies; Comments: Custom Electric, SEM Demo, strategic electrification scenarios	.75	185.00	138.75
Kravatz, Mark	2/12/2020	Correspondence: Jake and Adam regarding strategic electrification;	.25	185.00	46.25
Kravatz, Mark	2/17/2020	Comments: RI PY2016 Custom Electri Site Reports;	.25	185.00	46.25
Kravatz, Mark	2/18/2020	Comments: Custom Electric study, Strategic electrificaion; HER Report Comments, Target Market Survey; Task: REveiw One Pagers;	1.00	185.00	185.00
Kravatz, Mark	2/21/2020	Mtg. W/ John Richards re: status of workforce study; Task: Final edits on EERMC MEmber Curriculum; Edits on one pagers;	1.75	185.00	323.75
Kravatz, Mark	2/26/2020	Mtg: Res EM&V Monthly Check-in;	1.25	185.00	231.25
		Totals	15.00		2,832.50
		Total Labor			2,832.50

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020		Invoice	6966
				Total this Phase	\$8,608.50
<hr style="border-top: 1px dashed black;"/>					
Phase	004	EERMC Oversight - Education/Stakeholders			
Optimal Staff					
			Hours	Rate	Amount
Guerard, Michael		2/5/2020	1.75	195.00	341.25
		EERMC Education call and prep review of materials			
Kravatz, Mark		2/5/2020	1.00	185.00	185.00
		Mtg: Monthly EERMC Education Working Group;			
Kravatz, Mark		2/14/2020	.25	185.00	46.25
		Task: REview EERMC Member Curriculum;			
Kravatz, Mark		2/18/2020	1.50	185.00	277.50
		Task: REview/edit EERMC Onboarding curriculum			
Kravatz, Mark		2/26/2020	1.25	185.00	231.25
		Correspondence: Hubbard re: IES Program results; Correspondence with Becca re: IES program; Mtg:Mike re: IES Program;			
Kravatz, Mark		2/27/2020	.50	185.00	92.50
		Mtg: EERMC Hubbard to discuss IES end of year results and next steps;			
		Totals	6.25		1,173.75
		Total Labor			1,173.75
				Total this Phase	\$1,173.75
				Total this Project	\$81,999.75
				Total this Report	\$81,999.75

George Lawrence, Caerbannog Consulting
3540 Mountain Rd
Addison VT 05491

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 7
Invoice Date: February 29, 2020
OEI Project #: 7345

Work Performed for National Grid USA Service Company

Description of Services	Hours	Hourly Rate	Amount
Services Performed 02/01/20 through 02/29/20			
LABOR - Regular Hours	2.50	\$185.00	\$462.50
LABOR - Travel Hours	0.00	\$92.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$62.50</u>

George Lawrence, Caerbannog Consulting
Services Performed 02/01/20 through 02/24/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
2/4/20	Review MA EEAC DR presentation from Nov			0.25			0.25	0.00	0.25
2/12/2020	Follow up on permission to use NEEA marketing materials			0.25			0.25	0.00	0.25
2/14/2020	SEM regional call and follow up			0.50			0.50	0.00	0.50
2/24/2020	Review 2019 data, analysis to look at process savings, review 2019 Q4 report, call into shortened planning call with National grid and OER			1.50			1.50	0.00	1.50
							0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	2.50	0.00	0.00	2.50	0.00	2.50
	Total Amount	\$0.00	\$0.00	\$62.50	\$0.00	\$0.00	\$62.50	0.00	\$62.50

Cx Associates LLC
110 Main Street, Studio 1B, Burlington, VT 05401

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 1353.14
Invoice Date: February 29, 2020
OEI Project # 7345

Work Performed for National Grid USA Service Company

Description of Services	Amount		
Services Performed 1/1/2020 - 2/29/2020			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours (Chiodo)	11.50	\$195.00	\$2,242.50
LABOR - Regular Hours (Admin)	0.00	\$92.00	\$0.00
LABOR - Travel Hours	0.00	\$97.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$2,242.50</u>

Cx Associates LLC

Services Performed 1/1/2020 - 2/29/2020

Date	Description of Services	001 - Policy & Strategy	002- Cyclical Planning & Reporting Activities	003 - EERMC Oversight	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hours
1/8/20	Review N Grid 2020 plan and provide input			1.00		1.00	0.00	1.00
1/31/2020	Jan rpt rvw and comment			0.50		0.50	0.00	0.50
2/5/2020	RI data review and meeting prep			2.00		2.00	0.00	2.00
2/6/2020	RI meeting and 2019 data analysis			3.00		3.00	0.00	3.00
2/7/2020	2019 data rvw			0.25		0.25	0.00	0.25
2/13/2020	RI 2019 large retrofit results analysis and discussion			2.25		2.25	0.00	2.25
2/19/2020	Analysis and questions on 2019 large CI retrofit			1.00		1.00	0.00	1.00
2/26/2020	2019 data review and questions			1.50		1.50	0.00	1.50
						0.00	0.00	0.00
	Total Hours	0.00	0.00	11.50	0.00	11.50	0.00	11.50
	Total Amount	\$0.00	\$0.00	\$2,242.50	\$0.00	\$2,242.50	0.00	\$2,242.50

Energy Futures Group, Inc.

PO Box 587
 Hinesburg, VT 05461
 Phone: (802) 482-5001
 Fax: (802) 329-2143



Invoice

TO: Optimal Energy Inc.
 April Clodgo
 10600 Route 116, Suite 3
 Hinesburg, VT 05461
 clodgo@optenergy.com

Invoice #:3894
 Invoice Date: 3/5/2020
 Invoice Period: 2/1/2020-2/28/2020
 Job Name: RI EERMC
 Terms: Net 30 Days
 PO # 3200362251

Consultant Labor	Job-Phase-Project	Project Description	Rate	Hours	Amount
Dan Mellinger	4104-00-02	Cyclical Planning & Reporting Activities	\$185.00	6.25	\$1,156.25
Glenn Reed	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	3.75	\$731.25
Richard Faesy	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	5.00	\$975.00
EFG Labor Subtotal:				15.00	\$2,862.50

TOTAL DUE THIS INVOICE: \$2,862.50 USD

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:3894
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 2/1/2020-2/28/2020
Consultant: Dan Mellinger

Date	Phase-Project	Project Description	Hours	Task Description
2/5/2020	00-02	Cyclical Planning & Reporting Activities	0.75	C-team planning call for C&I sector meeting
2/6/2020	00-02	Cyclical Planning & Reporting Activities	3.50	Review materials for C&I sector meeting; attend C&I sector meeting; prep for lighting meeting; upstream data analysis
2/7/2020	00-02	Cyclical Planning & Reporting Activities	1.25	RI lighting committee call
2/9/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Follow-ups with Adam re: DLC
2/11/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Clean up lighting notes and data and send to team
TOTAL:			6.25	

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:3894
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 2/1/2020-2/28/2020
Consultant: Glenn Reed

Date	Phase-Project	Project Description	Hours Task Description
2/6/2020	00-02	Cyclical Planning & Reporting Activities	0.75 RI LED call
2/8/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Follow up on discussions w/S. Ross re: the future of Res. Lighting in RI
2/12/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Electrification strategy scenario call, prep
2/26/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Participate in monthly EM&V call
TOTAL:			3.75

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:3894
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 2/1/2020-2/28/2020
Consultant: Richard Faesy

Date	Phase-Project	Project Description	Hours Task Description
2/4/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Review Mark's survey and provide comments
2/5/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Heat pump emails
2/12/2020	00-02	Cyclical Planning & Reporting Activities	1.00 RI heat pumps call
2/17/2020	00-02	Cyclical Planning & Reporting Activities	2.50 Review four heat pump eval surveys and provide edits and comments
2/18/2020	00-02	Cyclical Planning & Reporting Activities	0.75 NEEP Cold Climate Heat Pump Standards Committee meeting (split with CT)
TOTAL:			5.00

Ralph Prahl
7613 Whitebridge Glen, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 13.1
Invoice Date: February 29, 2020
OEI Project #: 7345

Work Performed for National Grid USA Service Company

Description of Services	Amount		
Services Performed 1/01/20 through 2/29/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	33.75	\$195.00	\$6,581.25
LABOR - Travel Hours	0.00	\$97.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$6,581.25</u>

Ralph Prael
Services from February 01, 2020 to February 29, 2020

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hrs.
1/2/20	leg study billing analysis report comments; custom gas impact eval	0.50					0.50	0.00	0.50
1/5/2020	leg study billing analysis	0.25					0.25	0.00	0.25
1/8/2020	NGRID comments on leg study billing analysis report; res retro impact eval RFP rev;	0.50					0.50	0.00	0.50
1/9/2020	leg study BA	1.25					1.25	0.00	1.25
1/10/2020	Sense study - instr	0.25					0.25	0.00	0.25
1/11/2020	piggybacking report rev; Sense instr	1.25					1.25	0.00	1.25
1/12/2020	Sense study; piggybacking report rev	1.00					1.00	0.00	1.00
1/13/2020	Sense study; piggybacking report rev	0.50					0.50	0.00	0.50
1/14/2020	piggybacking report rev	0.50					0.50	0.00	0.50
1/15/2020	piggybacking report	0.25					0.25	0.00	0.25
1/16/2020	piggybacking study, Sense study	0.25					0.25	0.00	0.25
1/19/2020	leg study, heat pump study	0.25					0.25	0.00	0.25
1/20/2020	hp scenarios	1.25					1.25	0.00	1.25
1/21/2020	heat pump study	0.75					0.75	0.00	0.75
1/22/2020	hp study scenarios; check-in call	3.00					3.00	0.00	3.00
1/23/2020	hp study; prep for deep dive mtg; leg study	0.75					0.75	0.00	0.75
1/24/2020	leg study (call w/Carrie); EM&V deep dive mtg; e-mail mgmt	1.50					1.50	0.00	1.50
1/29/2020	leg study - participant intvw instr	0.25					0.25	0.00	0.25
1/31/2020	leg study participant instr	0.50					0.50	0.00	0.50
2/2/2020	heat pump study	0.50					0.50	0.00	0.50
2/3/2020	HP scenarios	0.50					0.50	0.00	0.50
2/4/2020	HP scenarios	0.25					0.25	0.00	0.25
2/5/2020	C&I studies check-in call; C&I on-site report	1.25					1.25	0.00	1.25
2/6/2020	ltg savings issue	0.25					0.25	0.00	0.25
2/7/2020	SEM study, C&I custom electric report	0.25					0.25	0.00	0.25
2/8/2020	HP study, ltg issue from Glenn, SEM study	0.75					0.75	0.00	0.75
2/9/2020	cust elec report	0.50					0.50	0.00	0.50
2/10/2020	SEM workplan; C&I custom electric impact eval report; heat pump study	1.50					1.50	0.00	1.50
2/11/2020	HP study - instrs	0.50					0.50	0.00	0.50
2/12/2020	HP study (conf call); C&I on-site report;	1.75					1.75	0.00	1.75
2/13/2020	C&I on-site study; HP study	1.00					1.00	0.00	1.00
2/14/2020	heat pump instrs; leg study	2.25					2.25	0.00	2.25
2/15/2020	heat pump study	1.75					1.75	0.00	1.75
2/18/2020	C&I on-site report	2.00					2.00	0.00	2.00
2/21/2020	C&I custom impact report; C&I on-site report; heat pump study	0.50					0.50	0.00	0.50
2/22/2020	custom impact evals; heat pump study	0.25					0.25	0.00	0.25
2/23/2020	custom impact report	0.25					0.25	0.00	0.25
2/24/2020	C&I custom electric impact eval (conf call)	0.75					0.75	0.00	0.75
2/26/2020	res studies check-in call	1.25					1.25	0.00	1.25
2/27/2020	res ltg shelf stocking study; codes studies; e-mail mgmt	0.50					0.50	0.00	0.50
2/28/2020	workforce study SOW; shelf stocking study	0.50					0.50	0.00	0.50
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hrs	33.75	0.00	0.00	0.00	0.00	33.75	0.00	33.75
	Total Amount	\$6,511.25	\$0.00	\$0.00	\$0.00	\$0.00	\$6,511.25	0.00	\$6,511.25

Rachel Sholly
48 Hudson Street
Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 26
Invoice Date: February 29, 2020
OEI Project #: 7345

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 2/01/20 through 2/29/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	20.75	\$148.00	\$3,071.00
LABOR - Travel Hours	0.00	\$74.00	\$0.00
			\$0.00
TOTAL DUE			<u>\$3,071.00</u>

Racel Solly
Services Performed 20120 through 22020

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	00 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
2/3/2020	Draft MPS results presentation call; MPS scheduling; Sent education agenda & materials; Emails w/aren			4.00			4.00		4.00
2/4/2020	Updated Annual Report word doc & sent to Grid; MPS scheduling & emails			1.50			1.50		1.50
2/5/2020	MPS scheduling; Prep & education call; MPS scheduling, prelim call on draft results, follow-up			1.75			1.75		1.75
2/6/2020	MPS prep, call & follow-up			2.50			2.50		2.50
2/10/2020	MPS market data walk-through call			1.00			1.00		1.00
2/12/2020	MPS draft results in-depth discussion			1.50			1.50		1.50
2/14/2020	TWG meeting for MPS/targets discussion; Drafted consolidated curriculum outline & sent to Mark; Finalized & sent education notes; Sent narrative & final ToC/timeline to writers			2.75			2.75		2.75
2/25/2020	MPS meeting prep call w/Dunsky; MPS Dunsky PUC presentation			3.75			3.75		3.75
2/27/2020	MPS in-person mtg w/Dunsky & call scheduling			2.00			2.00		2.00
	Total hours	0.00	0.00	20.75	0.00	0.00	20.75	0.00	20.75
	Total Amount	\$0.00	\$0.00	\$3,071.00	\$0.00	\$0.00	\$3,071.00	\$0.00	\$3,071.00



Invoice

Bill To:

National Grid
Attn: Matthew Ray, Customer Energy Management, RI
280 Melrose Street
Providence, RI 02907

Date	Invoice No.
2/11/2020	MPS-2

Item	Description	Quantity	Rate	Amount
	Market Potential Study Vendor Compensation	1	\$	\$164,196.20

Total	\$164,196.20
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Backup Documentation Attached to this Invoice:

Please make all checks payable in U.S.funds to:
State of Rhode Island
Energy Efficiency and Resource Management Council

Please mail all payments and contracts to:
Desautel Law
Attn: Marisa Desautel
38 Bellevue Avenue, Unit H
Newport, RI 02840



Invoice

Bill To:
National Grid
Attn: Matthew Ray, Customer Energy Management, RI
280 Melrose Street
Providence, RI 02907

Date	Invoice No.
2/11/2020	FPS-1

Item	Description	Quantity	Rate	Amount
	Future Market Potential Study Allocation	1	\$	\$40,000.00

Total	\$40,000.00
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Backup Documentation Attached to this Invoice:

Please make all checks payable in U.S.funds to:
State of Rhode Island
Energy Efficiency and Resource Management Council

Please mail all payments and contracts to:
Desautel Law
Attn: Marisa Desautel
38 Bellevue Avenue, Unit H
Newport, RI 02840

Invoice



March 31, 2020
Project No: 7345
Invoice No: 6987

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2020
PO #:

Professional Services from March 1, 2020 to March 31, 2020

Phase 001 Policy & Strategy

Optimal Staff

	Hours	Rate	Amount
Belliveau, Eric	4.25	195.00	828.75
Caesar, Adrian	13.25	130.00	1,722.50
Calcagni, Gretchen	.50	185.00	92.50
Guerard, Michael	71.00	195.00	13,845.00
Jacobs, Adam	15.25	185.00	2,821.25
Johnson, Craig	8.00	150.00	1,200.00
Kravatz, Mark	50.25	185.00	9,296.25
Ross, Samuel	55.50	185.00	10,267.50
Totals	218.00		40,073.75
Total Labor			40,073.75
		Total this Phase	\$40,073.75

Phase 002 Cyclical Planning & Reporting

Optimal Staff

	Hours	Rate	Amount
Chant, Elizabeth	5.75	195.00	1,121.25
Guerard, Michael	29.75	195.00	5,801.25
Jacobs, Adam	8.75	185.00	1,618.75
Johnson, Craig	55.50	150.00	8,325.00

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Project	7345	Rhode Island EERMC - 2020		Invoice	6987
	McDonald, Clifford	5.75	185.00	1,063.75	
	Ross, Samuel	33.50	185.00	6,197.50	
	Totals	139.00		24,127.50	
	Total Labor				24,127.50

Subcontractors

	Energy Futures Group, Inc.			5,760.00	
	Total Subcontractors			5,760.00	5,760.00

Total this Phase \$29,887.50

Phase 003 EERMC Oversight - EMV

Optimal Staff

	Hours	Rate	Amount	
Guerard, Michael	5.25	195.00	1,023.75	
Kravatz, Mark	10.00	185.00	1,850.00	
Ross, Samuel	2.75	185.00	508.75	
Totals	18.00		3,382.50	
Total Labor				3,382.50

Subcontractors

	Rachel Sholly			3,922.00	
	Caerbannog Consulting, LLC			1,433.75	
	Cx Associates LLC			1,072.50	
	Total Subcontractors			6,428.25	6,428.25

Total this Phase \$9,810.75

Phase 004 EERMC Oversight - Education/Stakeholders

Optimal Staff

	Hours	Rate	Amount	
Guerard, Michael	1.50	195.00	292.50	
Kravatz, Mark	13.75	185.00	2,543.75	
Totals	15.25		2,836.25	
Total Labor				2,836.25

Total this Phase \$2,836.25

Phase 005 Intern

Fixed Fees

	Monthly Intern Fee (March 2020)			2,272.73	
	Total Fixed Fees			2,272.73	2,272.73

Total this Phase \$2,272.73

Project	7345	Rhode Island EERMC - 2020		Invoice	6987
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Billing Limits	Current	Prior	To-Date	
Total Billings	84,880.98	145,587.73	230,468.71	
Limit			945,000.00	
Remaining			714,531.29	
		Total this Invoice		\$84,880.98

Billings to Date

	Current	Prior	Total
Labor	70,420.00	115,302.50	185,722.50
Subcontractor	12,188.25	25,412.50	37,600.75
Expense	0.00	2,600.00	2,600.00
Add-on	2,272.73	2,272.73	4,545.46
Totals	84,880.98	145,587.73	230,468.71

Project 7345 Rhode Island EERMC - 2020 Invoice 6987

Billing Backup

Monday, April 13, 2020

Optimal Energy Inc.

Invoice 6987 Dated 3/31/2020

2:56:25 PM

Phase 001 Policy & Strategy

Optimal Staff

			Hours	Rate	Amount
Belliveau, Eric	3/6/2020		.75	195.00	146.25
	check in call on target setting strategy, prep				
Belliveau, Eric	3/16/2020		1.00	195.00	195.00
	call on virus strategy, disc with MG, planning for big changes.				
Belliveau, Eric	3/19/2020		.50	195.00	97.50
	calls with MG on strategies				
Belliveau, Eric	3/25/2020		1.00	195.00	195.00
	various discussion with MG on covid, targets, cahnges in programs, vistual auditing				
Belliveau, Eric	3/26/2020		1.00	195.00	195.00
	covered a variety of issues including covid planning, new ideas, target setting, IE considerations.1				
Caesar, Adrian	3/2/2020		1.00	130.00	130.00
	Cross-jurisdictional financing program comparisons				
Caesar, Adrian	3/3/2020		1.00	130.00	130.00
	Cross-jurisdictional financing research				
Caesar, Adrian	3/4/2020		2.75	130.00	357.50
	RI Financing comps memo drafting				
Caesar, Adrian	3/5/2020		2.25	130.00	292.50
	Cross-jurisdictional financing comps memo draft finalization,				
Caesar, Adrian	3/9/2020		1.00	130.00	130.00
	RI Financing Program gaps analysis				
Caesar, Adrian	3/24/2020		1.00	130.00	130.00
	Financing Program Gaps Analysis				
Caesar, Adrian	3/25/2020		1.50	130.00	195.00
	Financing gaps analysis and comps to Dunsky financing program evaluation				
Caesar, Adrian	3/30/2020		1.50	130.00	195.00
	RI Financing memo feedback review from OER and Sector Team, second draft edits				
Caesar, Adrian	3/31/2020		1.25	130.00	162.50
	Gaps analysis, review of Grid memo feedback and financing dataset for C&I/Muni financing				
Calcagni, Gretchen	3/10/2020		.50	185.00	92.50
	Pulled together data on National Grid's cost to achieve in MA in recent years				
Guerard, Michael	3/4/2020		2.50	195.00	487.50
	Call w Grid/OER on Targets, prep and debriefs w SR				
Guerard, Michael	3/5/2020		2.25	195.00	438.75
	Call w BT/OER and Marisa on legal items, prep; MPS tasks; prep for CAP ED mtg				

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Page 4

Project	7345	Rhode Island EERMC - 2020		Invoice	6987
Guerard, Michael		3/6/2020	2.75	195.00	536.25
		Mtg w Laura/Matt-Grid on upcoming tasks, objectives; MPS/Targets tasks			
Guerard, Michael		3/9/2020	5.25	195.00	1,023.75
		1-1 council mtgs w Bob, Bill; Stds updatesw Marisa; debrief on SRP w CJ; EERMC mtg prep w team			
Guerard, Michael		3/10/2020	7.25	195.00	1,413.75
		Standards ConCall w OER/Grid; 1-1 mtg w Roberta; targets memo; follow-up tasks w Marisa on Stds			
Guerard, Michael		3/11/2020	3.00	195.00	585.00
		1-1 council mtg w Butch; Targets ConCall w OER/Grid; EERMC mtg prep			
Guerard, Michael		3/12/2020	2.25	195.00	438.75
		Call w Marisa on filings; develop language on Equity for Stds per OER request; debrief on 1-1 w Karen			
Guerard, Michael		3/13/2020	8.00	195.00	1,560.00
		EE TWG meeting; PUC LCP standards mtg			
Guerard, Michael		3/16/2020	2.25	195.00	438.75
		Finalize and submit equity language to PUC for Stds; coordinate providing GoTo function for EERMC mtg; rate/bill impact memo review			
Guerard, Michael		3/17/2020	5.25	195.00	1,023.75
		EERMC mtg prep			
Guerard, Michael		3/18/2020	8.00	195.00	1,560.00
		1-1 council member mtgs - Garlick, Case, Teichert; PUC livestream on HP motion; EERMC mtg prep			
Guerard, Michael		3/19/2020	8.00	195.00	1,560.00
		EERMC mtg, prep and debriefs			
Guerard, Michael		3/20/2020	2.75	195.00	536.25
		EERMC mtg follow-up tasks			
Guerard, Michael		3/23/2020	5.00	195.00	975.00
		Respond to P.Case query on Grid data; send ExComm approved changes to Targets memo to Marisa			
Guerard, Michael		3/24/2020	2.75	195.00	536.25
		COVID mitigation conf call w Grid and stakeholders; regional mitigation strategy review			
Guerard, Michael		3/25/2020	1.00	195.00	195.00
		Call w OER/RISE on workforce issues/COVID			
Guerard, Michael		3/27/2020	2.25	195.00	438.75
		Bi-weekly Chk-in with OER; update w Ron/Division on reporting schedules			
Guerard, Michael		3/30/2020	.50	195.00	97.50
		Respond to BT/OER query on mitigation strategies			
Jacobs, Adam		3/2/2020	1.25	185.00	231.25
		-review and comment on factors used for C&I lighting in potential study -share final Mass Save workforce dev report w/ OER -check in w/ Grid on plan for Thursday C&I sector call			
Jacobs, Adam		3/6/2020	1.00	185.00	185.00
		-upstream lighting call			
Jacobs, Adam		3/9/2020	.50	185.00	92.50
		-review updated/final surveys for heat pump study, share comments w/ rest of C-team			
Jacobs, Adam		3/10/2020	.75	185.00	138.75

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Project	7345	Rhode Island EERMC - 2020			Invoice	6987
		-schedule internal C&I sector prep call -follow-ups on workforce dev agenda -follow-ups on heat pump survey drafts				
Jacobs, Adam		3/11/2020	1.75	185.00		323.75
		-RI strat. elec survey comment assessment -review Dunsky responses to C&I lighting questions; check-in w/ Sam on early replacement measures				
Jacobs, Adam		3/12/2020	1.50	185.00		277.50
		-workforce development call				
Jacobs, Adam		3/13/2020	1.50	185.00		277.50
		-review and comment on latest Dunsky slide deck				
Jacobs, Adam		3/18/2020	.25	185.00		46.25
		-New England contractor training brainstorm				
Jacobs, Adam		3/19/2020	.50	185.00		92.50
		-follow-up w/ Nathan regarding ZNE/City of Providence				
Jacobs, Adam		3/20/2020	1.00	185.00		185.00
		-follow-ups on ZNE w/ Nathan -NGrid RI COVID-19 response notice -1/2 multi state check-in call				
Jacobs, Adam		3/24/2020	.25	185.00		46.25
		-Feb 2020 C&I data report review				
Jacobs, Adam		3/25/2020	.75	185.00		138.75
		-C&I sector prep call and mitigation discussion -1/2 call regarding possible workforce training efforts				
Jacobs, Adam		3/26/2020	1.00	185.00		185.00
		-bi-weekly RI EERMC internal check-in -email Mona RE: next week's C&I sector call				
Jacobs, Adam		3/27/2020	2.00	185.00		370.00
		-review NGrid C&I updates for March -follow-up w/ Mona on April C&I sector call -intro emails RE: industrial efforts w/ NGrid and Leidos -review/comment on C-team financing memo -supply chain interview guide for strategic electrification survey -1/2 multi state check-in				
Jacobs, Adam		3/30/2020	.75	185.00		138.75
		-review CHP stakeholder meeting docs -C&I sector agenda and meeting materials distribution				
Jacobs, Adam		3/31/2020	.50	185.00		92.50
		-1/2 regional EE programs check-in call				
Johnson, Craig		3/5/2020	.50	150.00		75.00
		Internal C-Team check-in.				
Johnson, Craig		3/9/2020	.75	150.00		112.50
		SRP Standards call.				
Johnson, Craig		3/10/2020	.50	150.00		75.00
		Potential Study and Target Setting - strategy discussions with internal team.				
Johnson, Craig		3/11/2020	1.00	150.00		150.00
		Potential Study and Target Setting - strategy discussions with internal team.				
Johnson, Craig		3/12/2020	1.00	150.00		150.00
		Check-in w/ Mike on TWG, PUC sessions, and EERMC meetings. Targets - work on graphics for targets memo.				

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Project	7345	Rhode Island EERMC - 2020			Invoice	6987
Johnson, Craig		3/18/2020	2.75	150.00		412.50
		SRP Meeting and associated meeting prep.				
Johnson, Craig		3/26/2020	1.00	150.00		150.00
		EERMC C-Team internal check-in call.				
Johnson, Craig		3/31/2020	.50	150.00		75.00
		Discuss impacts of Covid19 on programs w/ Mike.				
Kravatz, Mark		3/2/2020	2.50	185.00		462.50
		Task: Scheduling Res sector meetings with Grid team; Correspondence: w/ Becca T. regarding RI workforce opportunities; Task: Res Sector qualitative reporting document and calendar;				
Kravatz, Mark		3/3/2020	5.75	185.00		1,063.75
		Task: Draft Res Sector Qualitative Reporting Template; Task: schedule Res sector prep mtg; Task: Prep for IES Program CAP Exec. Dir. Mtg; Mtg: w/ Laura Rodormer to prep agenda for Res Sector meeting; Correspondence: Rachel Sholly re: EERMC handbook; Correspondence w/ Craig J. Re: res sector monthly reporting;				
Kravatz, Mark		3/4/2020	3.50	185.00		647.50
		Task: Schedule EERMC Member one on ones; Mtg: Monthly EERMC Education call; Mtg: w/ C-Team to prep for Res sector mtg.; Mtg: Craig and Mike to analyze IES Program data; Task: Prep and send Res sector agenda;				
Kravatz, Mark		3/5/2020	4.75	185.00		878.75
		Task: Update Res Sector Calendar; Task: Prep and send Res Sector Mtg Agenda; Mtg: Res Sector; Task: follow up on Res Sector mtg tasks; MTg: C-Team internal strategy meeting to discuss current/pressing EERMC-related topics and issues; Task: Send comments to Grid re: slides from EERMC meeting; Task: review comments on res sector qualitative reporting tool;				
Kravatz, Mark		3/6/2020	4.75	185.00		878.75
		Task: Prep data for CAP meeting; Mtg: Community Action Agency Executive Directors and Grid re: IES Program; Correspondence: Jonathan Rascoe (DHHS) re: items from the CAP meeting;				
Kravatz, Mark		3/9/2020	.75	185.00		138.75
		Correspondence: Re: schedule EERMC member one on ones; Correspondence: Jonathan Rascoe re: CAP employment data;				
Kravatz, Mark		3/10/2020	1.25	185.00		231.25
		Mtg: John Richards to discuss/plan for workforce development deep dive and general strategy; Correspondance w/ OER and C-team re: Workforce development updates;				
Kravatz, Mark		3/12/2020	4.25	185.00		786.25
		Task: REview Workforce Deep Dive Slides; Mtg: Workforce Deep Dive; Task: Provide Sam edits on Target-Setting Memo; Task: Draft EMV slides for EERMC MEeting				
Kravatz, Mark		3/13/2020	3.50	185.00		647.50
		Mtg: RI Technical Working Group; Mtg: RI C-team check-in; Correspondence: Elizabeth Chant re: Equity Standards language.				
Kravatz, Mark		3/16/2020	3.75	185.00		693.75
		Task: Update EERMC MEMber one on one meetings; Correspondence: Elizabeth Chant re: equity standard language; Task: Call RI contractors to get their take on impacts of Covid 19; Call Larry Zarker from BPI re: Covid 19 time training efforts; Task; Draft email to C-team regarding conversations with contractors;				
Kravatz, Mark		3/18/2020	1.50	185.00		277.50
		Mtg: Covid19 Contractor Training Strategy meeting with regional consultants; Correspondence: Consultants re: Training efforts during covid19 crisis;				

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Project	7345	Rhode Island EERMC - 2020			Invoice	6987
Kravatz, Mark		3/19/2020	3.50	185.00		647.50
		Mtg: EERMC; Mtg: Post-EERMC Debrief				
Kravatz, Mark		3/23/2020	1.75	185.00		323.75
		Mtg: Re: Equity in the Standards update;				
Kravatz, Mark		3/24/2020	.50	185.00		92.50
		Mtg: RI Scrum;				
Kravatz, Mark		3/25/2020	.75	185.00		138.75
		Mtg: Res Sector Prep with C-Team; Mtg:				
Kravatz, Mark		3/26/2020	2.00	185.00		370.00
		Mtg: Regional Covid19 Planning Consultants Mtg; MTg: C-team bi-weekly check-in;				
Kravatz, Mark		3/30/2020	3.00	185.00		555.00
		Mtg: Res Sector planning with Laura Rodormer and Mike G.; MTg: RI C-team check-in; Mtg: re: Equity in Standards update; Task": Prep list of potential questions for contractor status inquiry;				
Kravatz, Mark		3/31/2020	2.50	185.00		462.50
		Mtg: RI Team Check-in; Mtg: REgional Consultant Covid19 Response Strategy/Planning; Mtg: Mike G re: RI Strategy; Mtg: Criag and Mike res sector data planning strategy;				
Ross, Samuel		3/2/2020	2.75	185.00		508.75
		Finanancing jurisdictional comps next steps/mtg planning; review of draft results lifetime Q from John T; review of Dunsky invoice				
Ross, Samuel		3/3/2020	6.25	185.00		1,156.25
		review and distribute jurisdictional comps memo; clean up rate and bill impacts memo draft 1				
Ross, Samuel		3/4/2020	6.50	185.00		1,202.50
		continued expansion of rate and bill impacts memo; targets memo initial prep; res sector call; targets call.				
Ross, Samuel		3/5/2020	6.75	185.00		1,248.75
		sector team calls; internal check-in; finance jurisdictional comps; finalizing jurisdictional comps memo + rate and bill draft 1				
Ross, Samuel		3/6/2020	5.50	185.00		1,017.50
		targets discussion & memo drafting; disc. w/internal team re: lighting in MPS; outreach to dunsky for check-ins				
Ross, Samuel		3/16/2020	.75	185.00		138.75
		Rate and bill impacts memo call; prep for same				
Ross, Samuel		3/17/2020	4.50	185.00		832.50
		finalize memo for council meeting; initial discussion + test of GoToMeeting for Council meeting; informational interview for URI Energy Fellows program				
Ross, Samuel		3/18/2020	3.25	185.00		601.25
		DG study review call, prep, follow up; council meeting prep; high-level review of DR and other MPS deliverables				
Ross, Samuel		3/19/2020	8.50	185.00		1,572.50
		Council meeting; prep (incl IT); follow up				
Ross, Samuel		3/20/2020	2.25	185.00		416.25
		external call w/Slipstream re: financing marketplace, prep & followup re: same; council meeting follow ups				
Ross, Samuel		3/24/2020	1.00	185.00		185.00
		review MA lighting phase out planning dox; email re: feedback on financing memo;				

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Project	7345	Rhode Island EERMC - 2020			Invoice	6987
Ross, Samuel		3/25/2020	6.75	185.00		1,248.75
		call re: coordinating lighting btwn MA and RI; smart strip research and data validation re: Grid slide deck, email re: same; planning, correspondence re: financing research				
Ross, Samuel		3/26/2020	.75	185.00		138.75
		team check-in re: MPS next steps, financing next steps, etc.				
		Totals	218.00			40,073.75
		Total Labor				40,073.75
					Total this Phase	\$40,073.75

Phase 002 Cyclical Planning & Reporting

Optimal Staff

			Hours	Rate	Amount
Chant, Elizabeth		3/16/2020	1.00	195.00	195.00
		draft language on ethics; PDF packaging of Council materials			
Chant, Elizabeth		3/19/2020	.25	195.00	48.75
		email and scheduling			
Chant, Elizabeth		3/20/2020	.50	195.00	97.50
		internal check in			
Chant, Elizabeth		3/23/2020	1.50	195.00	292.50
		email; meeting with OER staff and company rep's on definition of equity; debrief and next steps with Guerard and Kravatz			
Chant, Elizabeth		3/27/2020	.50	195.00	97.50
		check in with internal team on multiple issues			
Chant, Elizabeth		3/30/2020	1.50	195.00	292.50
		review email and materials in advance of meeting; follow-up meeting with OER and stakeholders on definitions for social responsibility and equity			
Chant, Elizabeth		3/31/2020	.50	195.00	97.50
		review emails and documents on revisions to equity / social responsibility definition			
Guerard, Michael		3/2/2020	1.25	195.00	243.75
		Call on CPACE opps w OER, Frank Owens, prep and follow-up tasks			
Guerard, Michael		3/3/2020	3.25	195.00	633.75
		Prep call for mtg w CAPS; IE data review; review workforce dev materials			
Guerard, Michael		3/4/2020	4.50	195.00	877.50
		Prep for Rez sector mtg w team; prep for CI mtg w team; IES data review w MK, CJ; MPS review w AJ to apply to C&I planning			
Guerard, Michael		3/5/2020	5.75	195.00	1,121.25
		Monthly rez strategy mtg w Grid, debriefs; monthly C&I strategy mtg w Grid, debriefs; update on Financing comps memo w Grid, OER; review financing memo draft			
Guerard, Michael		3/6/2020	3.25	195.00	633.75
		CAP ex Dir mtg, prep and debriefs			
Guerard, Michael		3/10/2020	.25	195.00	48.75
		Follow-up on CAP mtg w Grid			
Guerard, Michael		3/12/2020	.75	195.00	146.25
		Work on targets memo with team			

Project	7345	Rhode Island EERMC - 2020			Invoice	6987
Guerard, Michael		3/13/2020	5.50	195.00		1,072.50
		Finalize and send Targets memo and related docs				
Guerard, Michael		3/14/2020	.50	195.00		97.50
		Send follow-up targets materials to BT/OER				
Guerard, Michael		3/20/2020	.75	195.00		146.25
		Review lighting issues - A-line and reflector timelines				
Guerard, Michael		3/25/2020	2.00	195.00		390.00
		CI sector mtg prep call w team; Rez sector mtg prep call w team				
Guerard, Michael		3/26/2020	1.25	195.00		243.75
		Draft 3-year planning strategies, approaches				
Guerard, Michael		3/31/2020	.75	195.00		146.25
		Planning call w MK, CJ - application of MPS; develop 3-year planning approaches				
Jacobs, Adam		3/3/2020	2.75	185.00		508.75
		-follow-ups w/ Grid on 3YP meeting				
		-check-in w/ Mike on overall planning process				
		-call w/ Mona to confirm agenda/schedule for Thursday call				
		-distribute agenda/schedule for Thursday call				
		-schedule internal check-in/prep call for Thursday C&I sector call				
Jacobs, Adam		3/4/2020	2.50	185.00		462.50
		-C&I EM&V call				
		-preview of how potential study will inform C&I planning w/ Sam and Mike				
		-C&I sector call interall prep meeting				
Jacobs, Adam		3/5/2020	3.00	185.00		555.00
		-C&I sector call/planning call + notes and prep				
		-RI C-team bi-weekly check-in				
Jacobs, Adam		3/6/2020	.50	185.00		92.50
		-follow-ups from C&I sector call/planning kick-off				
Johnson, Craig		3/2/2020	2.00	150.00		300.00
		Sector Teams - Compile year-end data review w/ updated data. Emails and calls about the same.				
Johnson, Craig		3/3/2020	6.75	150.00		1,012.50
		Sector Teams - Compile residential data report for January. Compile year-end data review w/ updated data. Emails and calls about the same.				
Johnson, Craig		3/4/2020	2.50	150.00		375.00
		Sector Teams - Compile residential data report for January. Compile year-end data review w/ updated data. Review qualitative update template for Residential team. Internal check-in w/ Residential and C&I teams to prep for sector team meetings. Emails and calls about the same.				
		Income Eligible Data Review - discuss w/ Mike and Mark.				
Johnson, Craig		3/5/2020	3.75	150.00		562.50
		Sector Teams - Residential and C&I sector team calls.				
Johnson, Craig		3/9/2020	3.50	150.00		525.00
		Work on updates for EERMC annual report.				
Johnson, Craig		3/10/2020	4.00	150.00		600.00
		Sector Teams - Develop updates for 2020 Res and C&I team data oversight. EERMC Annual Report - work on data and graphics.				
Johnson, Craig		3/11/2020	2.00	150.00		300.00
		EERMC Annual Report - work on data and graphics.				
Johnson, Craig		3/12/2020	7.25	150.00		1,087.50

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020			Invoice	6987
		EERMC Annual Report - work on data and graphics. Develop reporting infrastructure for sector teams. Targets - work on graphics for targets memo.				
Johnson, Craig		3/13/2020	3.25	150.00		487.50
		Targets - work on graphics and content for targets memo. Review memo and provide feedback.				
Johnson, Craig		3/16/2020	.50	150.00		75.00
		Post meeting materials to Council website.				
Johnson, Craig		3/19/2020	3.75	150.00		562.50
		Council Meeting - prep for meeting with Mike and Sam, attend Council meeting. Website - post meeting materials.				
Johnson, Craig		3/23/2020	4.75	150.00		712.50
		Sector Teams - Compile residential data report for February. Emails and calls about the same.				
Johnson, Craig		3/24/2020	5.00	150.00		750.00
		Sector Teams - Compile C&I data report for February. Emails and calls about the same.				
Johnson, Craig		3/25/2020	2.75	150.00		412.50
		Sector Teams - internal check-in and prep for residential and C&I team meetings. Review C&I commitments tracker development w/ Brian and Mike. Review 2020 BC Model w/ Sam to investigate smart strips comparison between Plan and Dunsky Potential study.				
Johnson, Craig		3/30/2020	1.75	150.00		262.50
		Sector teams - review residential and C&I questions from internal team. Prepare data to send out to full team. Emails about the same.				
Johnson, Craig		3/31/2020	2.00	150.00		300.00
		Sector team meetings - prep for residential and C&I team meetings. Planning prep - discuss plan to build out comparisons between BC model and potential study results w/ Mike and Mark.				
McDonald, Clifford		3/3/2020	2.50	185.00		462.50
		Rate/bill impact				
McDonald, Clifford		3/16/2020	3.25	185.00		601.25
		Rate and Bill impacts memo				
Ross, Samuel		3/9/2020	2.75	185.00		508.75
		Initial lighting Qs to dunsky; brief review of adoption curve studies				
Ross, Samuel		3/10/2020	.75	185.00		138.75
		Stds discussion; Resolving MPS Qs from Kenji				
Ross, Samuel		3/11/2020	7.50	185.00		1,387.50
		butch 1-on-1; review of lighting comments/concerns with Dunsky; review GRID numbers, discussion thereof; contract file sharing resolution				
Ross, Samuel		3/12/2020	8.00	185.00		1,480.00
		Target setting memo, metrics memo updates, discussions, revisions, etc.				
Ross, Samuel		3/13/2020	13.00	185.00		2,405.00
		PUC hearing, prep, followup re: same; finalizing memo for Council; review and correspondence with Dunsky re: final results slide deck				
Ross, Samuel		3/23/2020	1.25	185.00		231.25
		uploading council meeting recording; preparing final files for PUC submission				

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Project	7345	Rhode Island EERMC - 2020			Invoice	6987
Ross, Samuel		3/30/2020	.25	185.00	46.25	
	Mod Inc. catch-up					
	Totals		139.00		24,127.50	
	Total Labor					24,127.50
Total this Phase						\$29,887.50

Phase	003	EERMC Oversight - EMV				
Optimal Staff						
			Hours	Rate	Amount	
Guerard, Michael		3/4/2020	1.00	195.00	195.00	
	C&I monthly EMV chk in					
Guerard, Michael		3/25/2020	1.00	195.00	195.00	
	Chk in on EMV status					
Guerard, Michael		3/30/2020	3.25	195.00	633.75	
	Call w LR/Grid on sector mtgs; review MPS underlying data					
Kravatz, Mark		3/4/2020	1.75	185.00	323.75	
	Task: Review EMV tracker; Task: Send agenda to EMV team; Mtg: C&I EMV monthly meeting; Task: Scheudle Codes meeting with Kevin Rose;					
Kravatz, Mark		3/9/2020	.25	185.00	46.25	
	Task: Scheduling Codes meeting; Correspondence: Ralph;					
Kravatz, Mark		3/10/2020	1.75	185.00	323.75	
	Task: Review MA MMBTU study; Correspondence: C-team re: electrification study; Task: Review draft MA Workforce stuyd;					
Kravatz, Mark		3/18/2020	1.50	185.00	277.50	
	Mtg; Res Retrofit & Behavior Evaluation Kick-off;					
Kravatz, Mark		3/19/2020	1.00	185.00	185.00	
	MTg: Codes Policy discussion with Grid and OER;					
Kravatz, Mark		3/25/2020	1.75	185.00	323.75	
	Task: review tracker and draft/send Res EM&V Montly agenda; Mtg: RI Res EM&V Monthly;					
Kravatz, Mark		3/27/2020	.50	185.00	92.50	
	Correspondence: Romilee and Tony Larson re: electrification market study; Correspondence: w/ Jake ERickson re: electrification market study;					
Kravatz, Mark		3/30/2020	.50	185.00	92.50	
	Correspondence: C-team re: retrofit evaluation; Correspondence: Carrie and Ralph re: Workforce Study; Correspondence: samd na Ralph re: baseline study; Correspondence: Jake Erickson re: electrification study;					
Kravatz, Mark		3/31/2020	1.00	185.00	185.00	
	Mtg: Romilee and Tony to discuss heat pump process eval and EERMC EMV presentation; Mtg: Sam and Ralph to discuss revising RI baseline study;					
Ross, Samuel		3/31/2020	2.75	185.00	508.75	
	C&I Baseline study review					
	Totals		18.00		3,382.50	
	Total Labor					3,382.50
Total this Phase						\$9,810.75

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020	Invoice	6987
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Phase	004	EERMC Oversight - Education/Stakeholders
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Optimal Staff

		Hours	Rate	Amount	
Guerard, Michael	3/4/2020	.50	195.00	97.50	
	Debrief on education call w RS				
Guerard, Michael	3/30/2020	1.00	195.00	195.00	
	Update w Rachel S on CHP public forum, Education mtg				
Kravatz, Mark	3/2/2020	1.00	185.00	185.00	
	Task: Organize schedules for EERMC member one on one meetings; Task: Draft and send EERMC member one on one invites;				
Kravatz, Mark	3/3/2020	.75	185.00	138.75	
	Task: Schedule EERMC Member one on ones;				
Kravatz, Mark	3/9/2020	3.00	185.00	555.00	
	Mtg: EERMC member Bob White one on one; Mtg: ERM C member Bill Riccio one on one;				
Kravatz, Mark	3/10/2020	1.50	185.00	277.50	
	Mtg: ERM C member Roberta Fagan one on one;				
Kravatz, Mark	3/12/2020	1.50	185.00	277.50	
	Mtg: ERM C member Karen Verrengia one on one;				
Kravatz, Mark	3/17/2020	1.50	185.00	277.50	
	Mtg: ERM C member Tony Hubbard one on one;				
Kravatz, Mark	3/18/2020	4.50	185.00	832.50	
	Mtg: ERM C member Joe Garlick one on one; Mtg: ERM C member Peter Gill Case one on one; Mtg: ERM C member Kurt Teichurt one on one;				
	Totals	15.25		2,836.25	
	Total Labor				2,836.25
			Total this Phase		\$2,836.25
			Total this Project		\$82,608.25
			Total this Report		\$82,608.25

Caerbannog Consulting
George Lawrence
3540 Mountain Rd
Addison VT 05491

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 11
Invoice Date: March 31, 2020
OEI Project #: 7345

Work Performed for Rhode Island EERMC

Description of Services	Amount		
Services Performed 03/01/20 through 03/31/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	7.75	\$185.00	\$1,433.75
LABOR - Travel Hours	0.00	\$0.00	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$1,433.75</u>

Caerbannog Consulting

George LaFrance

Services Performed 03/01/20 through 03/31/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
3/3/2020	.5 hr Review 2019 data to prep for Call on Thursday call with Grid, .75 hr review Dunskey potential study			1.25			1.25	0.00	1.25
3/4/2020	1 hr EM&V Call, .5 hr C-Team prep call for call with Grid, .5 hr review materials to prep for call with Grid			2.00			2.00	0.00	2.00
3/5/2020	Check in call with National Grid			2.00			2.00	0.00	2.00
3/6/2020	1 hr Lighting Call with National Grid			1.00			1.00	0.00	1.00
3/11/2020	emails about the assumptions/methodology used by Dunskey potential study			0.25			0.25	0.00	0.25
3/17/2020	.5 hr review of Targets memo			0.50			0.50	0.00	0.50
3/24/2020	Review Feb savings, spending, participation			0.25			0.25	0.00	0.25
3/25/2020	Consultant team prep call			0.50			0.50	0.00	0.50
	Total hours	0.00	0.00	7.75	0.00	0.00	7.75	0.00	7.75
	Total Amount	\$0.00	\$0.00	\$1,333.75	\$0.00	\$0.00	\$1,333.75	0.00	\$1,333.75

Cx Associates LLC
110 Main Street, Studio 1B, Burlington, VT 05401

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 1353.15
Invoice Date: March 31, 2019
OEI Project #: 7345

Work Performed for National Grid USA Service Company

Description of Services	Amount		
Services Performed 3/1/2020 - 3/31/2020			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	5.50	\$195.00	\$1,072.50
LABOR - Travel Hours	0.00	\$97.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$1,072.50</u>

C Associates LLC

Services Performed 3/1/2020 - 3/31/2020

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
3/4/20	Review documents, prep for monthly meeting			0.75			0.75	0.00	0.75
3/5/2020	RI monthly meeting - prep and mtg.			2.75			2.75	0.00	2.75
3/11/2020	Potential study review			0.25			0.25	0.00	0.25
3/25/2020	Review 2020 Data and team meeting. Follow up emails			1.25			1.25	0.00	1.25
3/30/2020	Review materials for Thursday call			0.50			0.50	0.00	0.50
							0.00	0.00	0.00
	Total hours	0.00	0.00	5.50	0.00	0.00	5.50	0.00	5.50
	Total Amount	\$0.00	\$0.00	\$1,072.50	\$0.00	\$0.00	\$1,072.50	0.00	\$1,072.50

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Invoice

TO: Optimal Energy Inc.
April Clodgo
10600 Route 116, Suite 3
Hinesburg, VT 05461
clodgo@optenergy.com

Invoice #:3938
Invoice Date: 4/6/2020
Invoice Period: 3/1/2020-3/31/2020
Job Name: RI EERMC
Terms: Net 30 Days
PO # 3200362251

Consultant Labor	Job-Phase-Project	Project Description	Rate	Hours	Amount
Dan Mellinger	4104-00-02	Cyclical Planning & Reporting Activities	\$185.00	9.00	\$1,665.00
Glenn Reed	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	10.25	\$1,998.75
Richard Faesy	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	10.75	\$2,096.25
EFG Labor Subtotal:				30.00	\$5,760.00

TOTAL DUE THIS INVOICE: \$5,760.00 USD

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:3938
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 3/1/2020-3/31/2020
Consultant: Dan Mellinger

Date	Phase-Project	Project Description	Hours Task Description
3/3/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review RI potential study
3/4/2020	00-02	Cyclical Planning & Reporting Activities	1.75 Review RI data and potential study slide; planning call for C&I sector meeting
3/5/2020	00-02	Cyclical Planning & Reporting Activities	2.00 C&I sector call
3/6/2020	00-02	Cyclical Planning & Reporting Activities	2.25 Prep agenda for lighting call; lead meeting and send notes and follow-up items; MPS email follow-up
3/9/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review and respond to Travis' draft for LLLC market transformation incentives
3/11/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Respond to questions re: MPS assumptions
3/16/2020	00-02	Cyclical Planning & Reporting Activities	0.25 C-team communications re: COVID
3/18/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Contractor training brainstorming re: COVID
3/19/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Contractor training brainstorming re: COVID
3/25/2020	00-02	Cyclical Planning & Reporting Activities	1.00 C&I sector prep call; review data from Craig; review mitigation ideas from Adam
TOTAL:			9.00

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:3938
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 3/1/2020-3/31/2020
Consultant: Glenn Reed

Date	Phase-Project	Project Description	Hours Task Description
3/2/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Res. Lighting evaluation feedback on AMLs
3/3/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review Lighting market assessment to inform AMLs
3/4/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Res. Sector CT prep call
3/5/2020	00-02	Cyclical Planning & Reporting Activities	2.50 Monthly Res. Sector Team call; prep: review and comment on Council slide decl
3/16/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Initial review of Three-year targets, call w/M. Guerard re: Covid-19 impacts, sharing of CT and MA Covid-19 responses
3/18/2020	00-02	Cyclical Planning & Reporting Activities	1.75 Res. Retrofit and Behavior Eval K-O call
3/24/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review of NEMA A-line shipment data
3/25/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Call w/S. Ross re: lighting in RI and Potential study
3/25/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Review February data, calculate energy to demand ratios, prep call
3/30/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Planned evaluation activities
3/31/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Review and comment on retrofit draft work plan; review Ralph Prah!l's comments
TOTAL:			10.25

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:3938
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 3/1/2020-3/31/2020
Consultant: Richard Faesy

Date	Phase-Project	Project Description	Hours	Task Description
3/4/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Consulting team prep call
3/5/2020	00-02	Cyclical Planning & Reporting Activities	2.50	Review then monthly res meeting with Ngrid and Cteam
3/9/2020	00-02	Cyclical Planning & Reporting Activities	1.00	NEEP codes call (split with CT), heat pump evaluation emails
3/10/2020	00-02	Cyclical Planning & Reporting Activities	0.75	Review survey and responses
3/16/2020	00-02	Cyclical Planning & Reporting Activities	0.75	Covid-19 email and followup, planning
3/19/2020	00-02	Cyclical Planning & Reporting Activities	2.00	Fujitsu products presentation on heat pump product line, Codes evaluation call.
3/20/2020	00-02	Cyclical Planning & Reporting Activities	0.75	OEI check in on covid mitigation plans
3/25/2020	00-02	Cyclical Planning & Reporting Activities	1.50	Res consulting team prep call, Freddie Mac financing products update call.
3/26/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Mitsu heat pump demo
3/30/2020	00-02	Cyclical Planning & Reporting Activities	0.50	NEEP VFD meeting split with CT
TOTAL:			10.75	

Invoice



April 30, 2020
Project No: 7345
Invoice No: 7003

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2020
PO #:

Professional Services from April 1, 2020 to April 30, 2020

Phase	001	Policy & Strategy	<hr style="border-top: 1px dashed black;"/>		
Optimal Staff					
			Hours	Rate	Amount
		Belliveau, Eric	8.75	195.00	1,706.25
		Caesar, Adrian	18.50	130.00	2,405.00
		Guerard, Michael	64.25	195.00	12,528.75
		Jacobs, Adam	24.50	185.00	4,532.50
		Kravatz, Mark	35.25	185.00	6,521.25
		Mosenthal, Philip	.25	195.00	48.75
		Socks, Matthew	2.25	185.00	416.25
		Totals	153.75		28,158.75
		Total Labor			28,158.75
Subcontractors					
		JLC Consulting, LLC			292.50
		Ralph Prah			6,678.75
		Total Subcontractors			6,971.25
					6,971.25
				Total this Phase	\$35,130.00

Phase	002	Cyclical Planning & Reporting	<hr style="border-top: 1px dashed black;"/>		
Optimal Staff					
			Hours	Rate	Amount
		Chant, Elizabeth	2.25	195.00	438.75

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Project	7345	Rhode Island EERMC - 2020			Invoice	7003
	Guerard, Michael	34.25	195.00	6,678.75		
	Jacobs, Adam	4.75	185.00	878.75		
	Johnson, Craig	72.25	150.00	10,837.50		
	Ross, Samuel	79.75	185.00	14,753.75		
	Totals	193.25		33,587.50		
	Total Labor					33,587.50

Subcontractors

JLC Consulting, LLC	487.50	
Energy Futures Group, Inc.	8,082.50	
Total Subcontractors	8,570.00	8,570.00

Total this Phase \$42,157.50

Phase 003 EERMC Oversight - EMV

Optimal Staff

	Hours	Rate	Amount	
Guerard, Michael	4.00	195.00	780.00	
Jacobs, Adam	1.50	185.00	277.50	
Kravatz, Mark	17.75	185.00	3,283.75	
Mosenthal, Philip	3.50	195.00	682.50	
Totals	26.75		5,023.75	
Total Labor				5,023.75

Subcontractors

Rachel Sholly	5,661.00	
George Lawrence	925.00	
JLC Consulting, LLC	195.00	
Total Subcontractors	6,781.00	6,781.00

Total this Phase \$11,804.75

Phase 005 Intern

Fixed Fees

Monthly Intern Fee (April 2020)	2,272.73	
Total Fixed Fees	2,272.73	2,272.73

Total this Phase \$2,272.73

Billing Limits

	Current	Prior	To-Date
Total Billings	91,364.98	230,468.71	321,833.69
Limit			945,000.00
Remaining			623,166.31

Total this Invoice \$91,364.98

Project	7345	Rhode Island EERMC - 2020	Invoice	7003
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Billings to Date

	Current	Prior	Total
Labor	66,770.00	185,722.50	252,492.50
Subcontractor	22,322.25	37,600.75	59,923.00
Expense	0.00	2,600.00	2,600.00
Add-on	2,272.73	4,545.46	6,818.19
Totals	91,364.98	230,468.71	321,833.69

Project 7345 Rhode Island EERMC - 2020 Invoice 7003

Billing Backup

Thursday, May 14, 2020

Optimal Energy Inc.

Invoice 7003 Dated 4/30/2020

3:13:30 PM

Phase 001 Policy & Strategy

Optimal Staff

			Hours	Rate	Amount
Belliveau, Eric	4/3/2020		1.25	195.00	243.75
	call on Covid with NG and OER, review Grid offering in RI with MG				
Belliveau, Eric	4/10/2020		1.25	195.00	243.75
	disc with MG on regional covid response, training, remote audits and funding streams details on RISE				
Belliveau, Eric	4/15/2020		1.00	195.00	195.00
	read information forwarded by MG on Grid response to target setting				
Belliveau, Eric	4/16/2020		1.00	195.00	195.00
	targets setting prep call with MG, prep				
Belliveau, Eric	4/21/2020		1.00	195.00	195.00
	PIMs data review from MG				
Belliveau, Eric	4/22/2020		1.50	195.00	292.50
	PIMS meeting prep with MG, additional prep post meeting				
Belliveau, Eric	4/23/2020		1.75	195.00	341.25
	PIMS call, prep with MG, additional scheduling and debrief				
Caesar, Adrian	4/6/2020		1.25	130.00	162.50
	Res financing gaps analysis first iteration completion				
Caesar, Adrian	4/9/2020		1.50	130.00	195.00
	Res non EE financing tools research, expanded Res Gaps analysis				
Caesar, Adrian	4/14/2020		.75	130.00	97.50
	Additional Non EE Res financing research, expanded Res gaps analysis				
Caesar, Adrian	4/15/2020		2.50	130.00	325.00
	Financing project check in meeting, financing program research re: ratepayer contributions and capital sources				
Caesar, Adrian	4/22/2020		1.00	130.00	130.00
	C&I/Muni non EE financing research and expanded gaps analysis				
Caesar, Adrian	4/28/2020		3.00	130.00	390.00
	EERMC website updates, Expanded Res and C&I/Muni financing gaps analysis and memo drafting				
Caesar, Adrian	4/29/2020		4.50	130.00	585.00
	EERMC website updates, expanded Res and C&I/muni gaps analysis				
Caesar, Adrian	4/30/2020		4.00	130.00	520.00
	EERMC website updates, Expanded Res/C&I/Muni financing gaps analysis next draft finalization and Memo distribution to C-Team				
Guerard, Michael	4/1/2020		.25	195.00	48.75
	COVID mitigation tasks, coord with M.Ray/Grid; review and coord C-Team responses to Gas DR proposal SOW from Dunsky				
Guerard, Michael	4/2/2020		2.00	195.00	390.00
	Chk-in w M.Ray/Grid; Team chk-ins on monthly tasks; review OER to customer issue on HP incentive				

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Page 4

Project	7345	Rhode Island EERMC - 2020			Invoice	7003
Guerard, Michael		4/3/2020	1.25	195.00		243.75
		PUC process call on Targets, follow-up w BT, Marisa				
Guerard, Michael		4/3/2020	1.50	195.00		292.50
		Tech session prep, STds review; team coord discussions				
Guerard, Michael		4/6/2020	1.50	195.00		292.50
		OER/C-Team chk-in, follow-up tasks; Gas DR rfp review				
Guerard, Michael		4/7/2020	.50	195.00		97.50
		Stds tech session prep, coord w Marisa				
Guerard, Michael		4/8/2020	6.00	195.00		1,170.00
		Prep for Stds tech session,; prep for TWG mtg; COVID regional research				
Guerard, Michael		4/9/2020	5.00	195.00		975.00
		PUC Tech Session on Stds, prep and debriefs				
Guerard, Michael		4/10/2020	3.50	195.00		682.50
		EE TWG mtg, prep and debriefs w team; LCP standards review; annual report updates				
Guerard, Michael		4/13/2020	1.00	195.00		195.00
		Annual report review				
Guerard, Michael		4/14/2020	1.50	195.00		292.50
		PUC tech session prep w SR				
Guerard, Michael		4/15/2020	2.00	195.00		390.00
		PUC tech session prep w SR; PIMs prep				
Guerard, Michael		4/16/2020	5.75	195.00		1,121.25
		PUC Targets Tech Session prep; MPS updates; team coord.				
Guerard, Michael		4/17/2020	7.25	195.00		1,413.75
		PUC tech session on Targets, prep and debriefs				
Guerard, Michael		4/22/2020	4.00	195.00		780.00
		Call w Grid/OER on 3YP outline; AESC coordination call w OER/M.Socks, prep and debriefs; PIMs mtg prep				
Guerard, Michael		4/23/2020	2.25	195.00		438.75
		PIMs call w OER/Grid/Division, prep and debrief w EB				
Guerard, Michael		4/24/2020	6.00	195.00		1,170.00
		OER/C-team chk-in call; Update w B.Trietch on codes and other EERMC items; Review regional COVID planning that impacts RI; prep for MPS final report call				
Guerard, Michael		4/27/2020	3.75	195.00		731.25
		Call to review MPS draft final report; EERMC mtg prep, team task coord				
Guerard, Michael		4/28/2020	2.75	195.00		536.25
		EERMC mtg prep; PIMs research				
Guerard, Michael		4/30/2020	6.50	195.00		1,267.50
		EEERMC mtg, prep and debriefs; Targets PUC DR review and dev.				
Jacobs, Adam		4/1/2020	2.50	185.00		462.50
		-C&I EMV call				
		-1/2 industrial check-in call w NGrid				
		-heat pump study survey instruments call				
Jacobs, Adam		4/2/2020	3.50	185.00		647.50
		-EM&V follow-ups				
		-C&I sector call + prep, notes and follow-ups				
		-follow-ups on RI heat pump market assessment				
		-review of mitigation strategy recommendations and check-in w/ Mark on sector team call strategy/outcomes				
		-RI Measure Mapping - BC Model and MPS check-in				

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Project	7345	Rhode Island EERMC - 2020			Invoice	7003
Jacobs, Adam		4/3/2020	1.50	185.00	277.50	
		-RI/NEEP cold climate HP spec -RI C&I lighting call -1/2 multi-state check-in				
Jacobs, Adam		4/6/2020	.50	185.00	92.50	
		-share notes from C&I lighting call (\$2 increase to TLED incentive) -review RI NGrid Custom Electric 2016 report an 1-page summary				
Jacobs, Adam		4/7/2020	.25	185.00	46.25	
		-1/4 Northeast EE consultants check-in call				
Jacobs, Adam		4/8/2020	2.50	185.00	462.50	
		-1/2 Northeast BOC updates call -review and comment on Navigant RI Workforce Dev report -Potential study/BC model C&I mapping (specific measures) -1/2 TLED call				
Jacobs, Adam		4/9/2020	2.75	185.00	508.75	
		-RI lighting workforce development call w/ Grid -follow-up w/ Mark and BW Research regarding inclusion of customer FTEs in EE workforce report -RI HVAC workforce development call w/ Grid				
Jacobs, Adam		4/10/2020	.50	185.00	92.50	
		-follow-up on lighting workforce resources -1/3 cross-state call				
Jacobs, Adam		4/14/2020	1.25	185.00	231.25	
		-review CHP meeting invite/survey draft + follow-up on external presenters -final workforce report team comment review -1/4 NE EE coordinating call				
Jacobs, Adam		4/15/2020	1.00	185.00	185.00	
		-Rhode Island C&I NTG Study call -1/2 BOC fundamentals intro class call				
Jacobs, Adam		4/16/2020	.75	185.00	138.75	
		-outreach to firms that offer VEA/REA tools -review final survey instruments for HP market assessment				
Jacobs, Adam		4/20/2020	1.50	185.00	277.50	
		-review supply chain interview guide updates -follow-up w/ NGrid on ESCOs interactions w/ PA staff -BC + MPS mapping check-in -Grid note on Rhode Island Heat Pump Surveys and process eval question				
Jacobs, Adam		4/21/2020	.75	185.00	138.75	
		-1/4 NE EE consultant check-in call (EMV topics) -May C&I sector call planning				
Jacobs, Adam		4/22/2020	1.00	185.00	185.00	
		-new invites for C&I sector call -check-in w/ Grid on agenda topics for May C&I sector call -follow-ups with virtual/remote auditing firms				
Jacobs, Adam		4/23/2020	.25	185.00	46.25	
		-scheduling of EMV COVID call w/ DNV -CHP stakeholder meeting planning				
Jacobs, Adam		4/24/2020	1.50	185.00	277.50	
		-CHP meeting brainstorm -BC + MPS mapping for gas measures -1/2 multi-state check-in				
Jacobs, Adam		4/28/2020	1.75	185.00	323.75	

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Project	7345	Rhode Island EERMC - 2020			Invoice	7003
		-1/2 workforce check-in call w/ BOC -follow-up w/ Mona RE C&I sector call -1/4 NE consultants coordinating call -MPS & BC Model Mapping, 3yr Planning Discussion				
Jacobs, Adam		4/29/2020	.75	185.00		138.75
		-C&I sector prep call -CHP meeting planning follow-ups				
Kravatz, Mark		4/2/2020	4.00	185.00		740.00
		Task: prep resources for Res sector meeting such as mitigation strategies from around the region; Mtg: NEEP Webinar on Virtual Energy Auditing Software; Mtg: Monthly residential sector team meeting; Correspond: w/ glenn re: old climate HP spec;				
Kravatz, Mark		4/6/2020	2.00	185.00		370.00
		Mtg: OER, DOER and C-Team-Bi-Weekly check-in/strategy; Task: review draft equity standards doc; Correspond: john richards re: workforce development plans;				
Kravatz, Mark		4/9/2020	4.25	185.00		786.25
		Mtg: PUC Standards Technical Session; Mtg: strategy check-in with Mike; Correspond: Matt Ray re: Deep Dives; Task: Review edits from Richard re: HEA categories; Task: Research and send information re: workforce to Kevin Rose and John Richardson; Task: Review/edit moderate income memo; Tak: Review MassSave customer survey tool;				
Kravatz, Mark		4/10/2020	5.75	185.00		1,063.75
		Mtg: Mike and eric to discuss/review Virtual/Remote Energy Comparison Table Development; Mtg: EE Technical Working Group; Mtg: National Grid re: workforce Development strategy/opportunities; Mtg Re: Heat Pump Process Evaluation; Mtg w/ Richard Continued re: Virtua/Remote EAs; Task: Review/make edits on moderate income memo from OER;				
Kravatz, Mark		4/15/2020	3.25	185.00		601.25
		Task: Outreach to vendors to participate in VEA/REA survey; Correspond: Mike re: Moderate income memo;				
Kravatz, Mark		4/16/2020	1.00	185.00		185.00
		Task: followup on VEA/REA survey items;				
Kravatz, Mark		4/21/2020	2.00	185.00		370.00
		Mtg: NE EE Consultants Covid Mitigation strategy meeting; MPS & BC Model Mapping Discussion with C-team;				
Kravatz, Mark		4/23/2020	2.75	185.00		508.75
		Task: EMV Memo for EERMC; Correspond: Julie Cap re: WAP Annual Plan; Correspond: EFG re: Survey;				
Kravatz, Mark		4/24/2020	4.75	185.00		878.75
		Task: EMV Memo for EERMC; Task: EE TRM Memo; Task: Draft structure for planning Res three-year plan; Correspond: Carrie re: EM&V changes;				
Kravatz, Mark		4/27/2020	.50	185.00		92.50
		Mtg: Ellen Tohn re: HH and Remote audits in RI;				
Kravatz, Mark		4/28/2020	5.00	185.00		925.00
		Mtg: Virtual/remote EA survey with EFG and Guerard; Mtg: RI Team check-in; Mtg: WAP Annual plan public hearing; Mtg: follow up with Julie C.; Mtg: Check-in/strategy with Guerard; Task: Complete table for Res sector planning; Mtg: Mike G. RI Strategy				
Mosenthal, Philip		4/8/2020	.25	195.00		48.75
		emails re Gas DR				
Socks, Matthew		4/6/2020	1.00	185.00		185.00

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		Review draft gas demand response potential study scope			
Socks, Matthew		4/22/2020	.50	185.00	92.50
		Discuss AESC study coordination with RI			
Socks, Matthew		4/27/2020	.75	185.00	138.75
		Review Becca's comments on draft AESC RFP			
		Totals	153.75		28,158.75
		Total Labor			28,158.75
				Total this Phase	\$35,130.00

Phase 002 Cyclical Planning & Reporting

Optimal Staff

			Hours	Rate	Amount
Chant, Elizabeth	4/9/2020		1.00	195.00	195.00
		review and comment on OER moderate income data request to Grid; emails about PUC hearing agenda and coverage			
Chant, Elizabeth	4/10/2020		1.00	195.00	195.00
		email re PUC discussion of social responsibility language; meet on COVID response / virtual audit			
Chant, Elizabeth	4/15/2020		.25	195.00	48.75
		emails on OER moderate income memo to Grid			
Guerard, Michael	4/2/2020		2.25	195.00	438.75
		Rez Sector mtg, prep and debriefs; coord. w Division on reporting schedules; CHP annual mtg coord			
Guerard, Michael	4/3/2020		1.50	195.00	292.50
		COVID call w Grid, stakeholders, prep			
Guerard, Michael	4/6/2020		1.25	195.00	243.75
		Follow-up discussion on C&I lighting w team; Group communications on Equity language for standards, program planning			
Guerard, Michael	4/9/2020		2.00	195.00	390.00
		Virtual/remote audit research, discussion w/ EnergyX; 3YP planning prep			
Guerard, Michael	4/13/2020		1.50	195.00	292.50
		Remote audit task, coord w team			
Guerard, Michael	4/14/2020		2.25	195.00	438.75
		Call w OER/Grid on virtual audits; Remote audit survey work			
Guerard, Michael	4/15/2020		2.00	195.00	390.00
		SRP TWG mtg, prep and debrief w CJ			
Guerard, Michael	4/20/2020		4.00	195.00	780.00
		3YP planning process development; Remote audit survey work			
Guerard, Michael	4/21/2020		3.25	195.00	633.75
		MPS review; team discussion on mapping MPS to BC Model			
Guerard, Michael	4/23/2020		4.75	195.00	926.25
		3YP plan process and timeline review w team; MPS review; EERMC mtg prep			
Guerard, Michael	4/27/2020		1.00	195.00	195.00
		Remote audit reasearch follow-up w team			
Guerard, Michael	4/28/2020		3.25	195.00	633.75
		Debrief w MK on WAP call; 3YP plan process development; team coord			

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Project	7345	Rhode Island EERMC - 2020			Invoice	7003
Guerard, Michael		4/29/2020	5.25	195.00		1,023.75
		Call w team and B.Trietch/OER on proposed 3YP plan processes; C&I team mtg to prep for monthly strategy call; work on remote audit report/survey; additional 3YP process development and mtg coord w Grid.				
Jacobs, Adam		4/7/2020	3.75	185.00		693.75
		-C&I Potential Study/BC model end use mapping -CHP call & feedback and survey				
Jacobs, Adam		4/21/2020	1.00	185.00		185.00
		-MPS and BC model mapping C-team review				
Johnson, Craig		4/1/2020	1.00	150.00		150.00
		SRP - Check-in w/ SRP TWG team on NGrid's methods for capturing transmission benefits from NWA projects.				
Johnson, Craig		4/2/2020	4.00	150.00		600.00
		Sector Teams - Monthly residential and C&I sector team calls. Associated meeting prep. Planning - Discuss mapping of measure from NGrid's BC models to measure from the Market Potential Study w/ Sam and Adam. Website - Update Councilors page.				
Johnson, Craig		4/7/2020	1.00	150.00		150.00
		Planning - Begin work on mapping of residential measures from NGrid's BC models to measure from the Market Potential Study. Check-in call w/ Sam and Adam about the same.				
Johnson, Craig		4/8/2020	.25	150.00		37.50
		Council Meeting - Discuss agenda items and work products needed for April meeting w/ Mike.				
Johnson, Craig		4/9/2020	6.00	150.00		900.00
		Sector Teams - Develop new data and visuals for monthly reporting workbooks for residential and C&I teams.				
Johnson, Craig		4/13/2020	6.50	150.00		975.00
		Sector Teams - Develop new data and visuals for monthly reporting workbooks for residential and C&I teams.				
Johnson, Craig		4/14/2020	2.50	150.00		375.00
		EERMC Annual Report - Develop new and update existing graphics.				
Johnson, Craig		4/15/2020	5.25	150.00		787.50
		EERMC Annual Report - Develop new and update existing graphics. SRP - SRP TWG Meeting.				
Johnson, Craig		4/16/2020	.50	150.00		75.00
		EERMC Annual Report - Develop new and update existing graphics.				
Johnson, Craig		4/17/2020	2.25	150.00		337.50
		EERMC Annual Report - Develop new and update existing graphics. Emails about the same. Sector Teams - Prepare monthly reporting workbooks for Q1 data.				
Johnson, Craig		4/20/2020	6.50	150.00		975.00
		Planning - Work on mapping residential measures between BC model and potential study. Check-in w/ Adam and Sam about the same.				
Johnson, Craig		4/21/2020	4.75	150.00		712.50
		SRP - Coordinate w/ Matt Chase on presentation for April EERMC meeting. Planning - Work on mapping residential measures between BC model and potential study. Check-in w/ Adam and Sam about the same.				
Johnson, Craig		4/23/2020	1.00	150.00		150.00

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Project	7345	Rhode Island EERMC - 2020			Invoice	7003
		Planning - Discuss 3YR Planning process, timeline, and deliverables with internal team.				
Johnson, Craig		4/24/2020	7.00	150.00		1,050.00
		EERMC Annual Report - Updates and enhancements to graphics. Updates to narrative. Emails about the same. Council Meeting - Prepare SRP TWG update for memo to Council. Discussion w/ Mike about the same.				
Johnson, Craig		4/27/2020	2.50	150.00		375.00
		Sector Teams - Review Q1 Res and C&I data. Assemble Q1 data reports and prepare for distribution to internal team for review.				
Johnson, Craig		4/28/2020	7.50	150.00		1,125.00
		Sector Teams - Review Q1 Res and C&I data. Assemble Q1 data reports and prepare for distribution to internal team for review. Distribute reports and question trackers to internal team for review. Website - Coordinate posting of meeting materials w/ Becca and Adrian. Planning - Internal 3YR planning meeting w/ internal team. Work on mapping of residential measures between BC model and potential study.				
Johnson, Craig		4/29/2020	8.00	150.00		1,200.00
		Council Meeting - review SRP presentation for Council meeting and provide comments to Matt Chase. Sector Teams - C&I Sector team internal call to prep for monthly strategy meeting. Planning - Residential measure mapping between BC model and potential study. Targets - Respond to PUC IR, coordination w/ Sam about the same.				
Johnson, Craig		4/30/2020	5.75	150.00		862.50
		Targets - Respond to PUC IR, coordination w/ Sam about the same. Council Meeting - Meeting and associated meeting prep.				
Ross, Samuel		4/1/2020	2.25	185.00		416.25
		CHP Annual Meeting Planning, Annual Report Check-in; MPS clarifying question responses, aggregation and sharing with Dunsky				
Ross, Samuel		4/2/2020	3.75	185.00		693.75
		initial listing of prudence and reliability factors; finance research check-in; BC-MPS mapping				
Ross, Samuel		4/3/2020	2.75	185.00		508.75
		helping out division consultant with MPS data; Targets procedural call + follow up				
Ross, Samuel		4/7/2020	3.25	185.00		601.25
		begin review of financing memo; mps bc model mapping and guidance; CHP annual meeting planning call; closing the loop on C&I baseline study				
Ross, Samuel		4/8/2020	1.25	185.00		231.25
		finish financing memo review & feedback; setting up Marley with dox to build MPS-BC comparison tool				
Ross, Samuel		4/9/2020	1.75	185.00		323.75
		begin review of gas DR proposal; gas data work + check-in with Marley				
Ross, Samuel		4/10/2020	4.25	185.00		786.25
		financing gaps analysis (not memo updates), prep re: same; finalizing gas dr comments; mod income review and comments; CHP annual meeting MPS text drafting; technical WG				
Ross, Samuel		4/14/2020	1.50	185.00		277.50
		Dunsky Feb Invoice review, QA; begin preparation for PUC hearing				
Ross, Samuel		4/15/2020	3.75	185.00		693.75
		PUC Prep call, planning w/mike, review of other filings				

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Project	7345	Rhode Island EERMC - 2020			Invoice	7003
Ross, Samuel		4/16/2020	5.50	185.00		1,017.50
		PUC Prep calls, initial data exploration and talking point planning; continued review of other filings				
Ross, Samuel		4/17/2020	7.50	185.00		1,387.50
		PUC technical session, debrief, initial data exploration follow-ups				
Ross, Samuel		4/21/2020	2.50	185.00		462.50
		MPS BC model mapping internal draft disc; begin reviewing RI MPS draft report				
Ross, Samuel		4/22/2020	2.00	185.00		370.00
		continued review of MPS draft documents				
Ross, Samuel		4/23/2020	6.25	185.00		1,156.25
		3-yr planning process meeting, prep re: same; continued review of MPS draft report documents				
Ross, Samuel		4/24/2020	6.75	185.00		1,248.75
		c-team check in; continued review of MPS draft report documents; review and sharing of gas dr scope review & rate and bill impacts memo; continued MPS draft report document review				
Ross, Samuel		4/25/2020	3.00	185.00		555.00
		RI MPS draft report document review				
Ross, Samuel		4/26/2020	1.75	185.00		323.75
		RI MPS draft report document review; synthesize key comments				
Ross, Samuel		4/27/2020	1.25	185.00		231.25
		call w/dunsky re: initial mps feedback, prep and follow-up re: same				
Ross, Samuel		4/28/2020	5.75	185.00		1,063.75
		PUC data request response initial data work, clarification Qs; mps bc model mapping v2 check in; 3-yr planning proc. discussion				
Ross, Samuel		4/29/2020	5.50	185.00		1,017.50
		continued work on PUC data requests; 3-yr planning call, prep & follow up re: same; financing gaps analysis check in and guidance re: next steps				
Ross, Samuel		4/30/2020	7.50	185.00		1,387.50
		PUC data request responses; council meeting, prep re: same; finalize rate and bill impacts memo				
		Totals	193.25			33,587.50
		Total Labor				33,587.50
					Total this Phase	\$42,157.50

Phase	003	EERMC Oversight - EMV			
Optimal Staff					
			Hours	Rate	Amount
Guerard, Michael		4/1/2020	.25	195.00	48.75
		C&I monthly EMV call			
Guerard, Michael		4/2/2020	.50	195.00	97.50
		ccHP spec team discussion			
Guerard, Michael		4/6/2020	.75	195.00	146.25
		Behaviour eval doc review			
Guerard, Michael		4/29/2020	2.50	195.00	487.50
		Rez EMV monthly call, follow-up review/coord on codes			

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Jacobs, Adam		4/29/2020	1.50	185.00		277.50
		-RI gas C&I load shape study comments and research on gas load shapes to share w/ DNV				
Kravatz, Mark		4/1/2020	4.75	185.00		878.75
		Task: Prep Agenda; for C&I EM&V Meeting; Mtg: C&I EM&V Meeting; Mtg: Heat Pump Market Study Overview; Correspond: Ben Crosby re: Gas peak demand study; Correspond: Michael from Tetra Tech; Correspond: Ralph re: Market potential study; Task: review/edit Cadmus upstream lighting one-pager; Task: Schedule heat pump process eval meeting; Task: Send comments on RI strategic electrification;				
Kravatz, Mark		4/6/2020	1.75	185.00		323.75
		Mtg: W/ Ben Crosby (Grid) re: RI EM&V protocol; Correspond: Ralph re: Custom electric 2016; Correspond: Res retrofit and Behavior studies; Correspond: re: heat pump process study;				
Kravatz, Mark		4/8/2020	2.50	185.00		462.50
		Task: RI EMV Studies comment organization and submittal; Task review/edit 2019 RI Workforce study; Correspond: Sam and Ralph re: baseline study; Task: comments on re retrofit and behavior studies; Correspondence: Tony Larson re: heat pump study; Comments: Custom electric 2016 one-pager comments;				
Kravatz, Mark		4/9/2020	.25	185.00		46.25
		Correspond: Adam Jacobs re: Workforce study and counting FTEs;				
Kravatz, Mark		4/10/2020	.50	185.00		92.50
		Mtg: re: Next steps for Heat Pump Process Evaluation;				
Kravatz, Mark		4/14/2020	.50	185.00		92.50
		Correspond: John richards re: Workforce study comments; Correspond: re heat pump surveys;				
Kravatz, Mark		4/15/2020	1.00	185.00		185.00
		Mtg: C&I Net to Gross Study;				
Kravatz, Mark		4/17/2020	1.25	185.00		231.25
		Correspond: C-team re: Res retrofit and Behavioral studies; Correspond: Phil Mosenthal re: Codes study; Task: comments on heat pump study;				
Kravatz, Mark		4/22/2020	.75	185.00		138.75
		Mtg: Adam W. (Grid) re: Codes Study Planning; Task: Review EMV Tracker Covid19 updates; Correspond: res retrofit and process eval.;				
Kravatz, Mark		4/23/2020	1.00	185.00		185.00
		Comments: Res retrofit and process evals; Correspond: re: heat pump process survey questions; Correspond: re: regional sales data reports; Correspond re: supply change interview;				
Kravatz, Mark		4/24/2020	.25	185.00		46.25
		Correspond & Task: Kevin Rose re: next steps for Codes study planning and scheduling;				
Kravatz, Mark		4/27/2020	1.25	185.00		231.25
		Correspond: tony Larson re: heat pump study; Comments: Behavior study; correspond: Tony regional Sales Data; Comments: retrofit study; Correspond: Supply Chain for heat pump study; Correspond: Becca re: Gas Peak study;				
Kravatz, Mark		4/29/2020	2.00	185.00		370.00
		Task: Review Tracker for EM&V meeting; Mtg: Res EM&V monthly;				
Mosenthal, Philip		4/16/2020	3.00	195.00		585.00
		codes and standards emails, EMV work plans, ph .and emails w/ RP re same, rev. and comment on plans				
Mosenthal, Philip		4/17/2020	.50	195.00		97.50

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Project	7345	Rhode Island EERMC - 2020	Invoice	7003
	emails re C&S EMV			
	Totals	26.75	5,023.75	
	Total Labor			5,023.75
			Total this Phase	\$11,804.75
			Total this Project	\$89,092.25
			Total this Report	\$89,092.25

George Lawrence, Caerbannog Consulting
3540 Mountain Rd
Addison VT 05491

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 15
Invoice Date: April 30, 2020
OEI Project #: 7345

Work Performed for Rhode Island EERMC

Description of Services		Amount	
Services Performed 04/01/20 through 04/30/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	5.00	\$185.00	\$925.00
LABOR - Travel Hours	0.00	\$0.00	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$925.00</u>

George Lawrence, Caerbannog Consulting
Services Performed 01/20 through 03/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning & Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
4/2/2020	EM&V call			1.75			1.75	0.00	1.75
4/3/2020	.5 hr RI/MA Upstream Lighting call and .25 hr follow up			0.75			0.75	0.00	0.75
4/9/2020	.5 hr Call with Grid to discuss lighting training options, .25 hr follow up to call to discuss training options			0.75			0.75	0.00	0.75
4/27/2020	.25 hr respond to evaluation call proposal			0.25			0.25	0.00	0.25
4/29/2020	.5 hr consultant prep call, 1 hr review of data and provide comments, questions			1.50			1.50	0.00	1.50
							0.00	0.00	0.00
	Total hours	0.00	0.00	5.00	0.00	0.00	5.00	0.00	5.00
	Total Amount	\$0.00	\$0.00	\$25.00	\$0.00	\$0.00	\$25.00	0.00	\$25.00

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Invoice

TO: Optimal Energy Inc.
April Clodgo
10600 Route 116, Suite 3
Hinesburg, VT 05461
clodgo@optenergy.com

Invoice #:3982
Invoice Date: 5/8/2020
Invoice Period: 4/1/2020-4/30/2020
Job Name: RI EERMC
Terms: Net 30 Days
PO # 3200362251

Consultant Labor	Job-Phase-Project	Project Description	Rate	Hours	Amount
Dan Mellinger	4104-00-02	Cyclical Planning & Reporting Activities	\$185.00	10.75	\$1,988.75
Glenn Reed	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	13.50	\$2,632.50
Richard Faesy	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	17.75	\$3,461.25
EFG Labor Subtotal:				42.00	\$8,082.50

TOTAL DUE THIS INVOICE: \$8,082.50 USD

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:3982
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 4/1/2020-4/30/2020
Consultant: Dan Mellinger

Date	Phase-Project	Project Description	Hours	Task Description
4/2/2020	00-02	Cyclical Planning & Reporting Activities	3.00	C&I sector team meeting; prep agenda and data for tomorrow's lighting meeting
4/3/2020	00-02	Cyclical Planning & Reporting Activities	1.50	Lighting data analysis; lead lighting committee call
4/6/2020	00-02	Cyclical Planning & Reporting Activities	0.75	Organize notes from lighting call and send out to team; create doodle poll for workforce development call; midstream discussion
4/7/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Follow-ups with OEI re: lighting
4/8/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Discuss COVID lighting incentives with Adam and George; draft proposed consultant recommendation
4/9/2020	00-02	Cyclical Planning & Reporting Activities	1.75	Prep for and lead lighting workforce development call; follow-ups with team; prepare notes from workforce call; connect Ben Rivers to Lighting Design Lab
4/10/2020	00-02	Cyclical Planning & Reporting Activities	0.75	Clean up notes from workforce dev meeting and send out to team; collect info on smart/connected buildings; research lighting training opps
4/16/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Call with NEEA to discuss lighting training opps for RI; call with LDL to discuss NLC training
4/28/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Prep for Friday's lighting call
4/29/2020	00-02	Cyclical Planning & Reporting Activities	0.75	C&I sector team prep call
4/30/2020	00-02	Cyclical Planning & Reporting Activities	0.75	Data analysis and planning for lighting meeting
TOTAL:			10.75	

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:3982
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 4/1/2020-4/30/2020
Consultant: Glenn Reed

Date	Phase-Project	Project Description	Hours	Task Description
4/1/2020	00-02	Cyclical Planning & Reporting Activities	0.25	ccHP webinar
4/1/2020	00-02	Cyclical Planning & Reporting Activities	1.50	RI HP study call, prep
4/2/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Follow up on HP market study: cold climate definition
4/2/2020	00-02	Cyclical Planning & Reporting Activities	2.25	Res sector call w/Grid, prep
4/3/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Cold climate HP spec used in RI
4/3/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Increased Res. Electricity use
4/6/2020	00-02	Cyclical Planning & Reporting Activities	0.75	Review of HER and Retrofit EM&V work plans
4/13/2020	00-02	Cyclical Planning & Reporting Activities	1.00	Review and comment on Workforce Study work plan
4/20/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Reviw of March retail lighting and appliance data
4/22/2020	00-02	Cyclical Planning & Reporting Activities	0.25	NEEP/AESP Appliance standards call
4/23/2020	00-02	Cyclical Planning & Reporting Activities	2.00	Review and comment on revised home retrofit scope of work and IDI guide
4/24/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Review and comments on revised Behavior workplan
4/29/2020	00-02	Cyclical Planning & Reporting Activities	1.75	Review of Q1 data and fill out Question tracker; EM&V call and review of HER workplan response
4/29/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Review UCLA/Sierra Club gas appliance health impact study
4/30/2020	00-02	Cyclical Planning & Reporting Activities	1.50	Review of Q1 data; fill out question tracker
TOTAL:			13.50	

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:3982
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 4/1/2020-4/30/2020
Consultant: Richard Faesy

Date	Phase-Project	Project Description	Hours	Task Description
4/2/2020	00-02	Cyclical Planning & Reporting Activities	3.75	Review Remote/Virtual Audit survey with M. Kravatz (split with CT), NEEP Allies call updates, Res Team call with Ngrid, follow up with M. Kravatz re. mitigation. Review heat pump interview guide.
4/3/2020	00-02	Cyclical Planning & Reporting Activities	1.25	M. Kravatz mitigation and virtual assessments survey table
4/7/2020	00-02	Cyclical Planning & Reporting Activities	0.50	NE Consultants planning coordination call (split with CT)
4/10/2020	00-02	Cyclical Planning & Reporting Activities	1.25	Prep remote/virtual audit survey
4/10/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Audit survey
4/10/2020	00-02	Cyclical Planning & Reporting Activities	0.75	Prep virtual audit survey
4/13/2020	00-02	Cyclical Planning & Reporting Activities	2.00	Remote/virtual assessment survey review, check in with Mark K. (split with CT)
4/14/2020	00-02	Cyclical Planning & Reporting Activities	2.00	Distribute virtual/remote assessments survys to firms requesting responses (split with CT)
4/15/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Review ASHP survey questions
4/16/2020	00-02	Cyclical Planning & Reporting Activities	2.25	Heat pump survey eval review, CCEI emai review and respond
4/20/2020	00-02	Cyclical Planning & Reporting Activities	1.00	PPT outline for virtual/remote assessments survey with M. Kravatz
4/22/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Schedule meetings, update calendar
4/23/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Heat pump survey review
4/28/2020	00-02	Cyclical Planning & Reporting Activities	1.25	Check in with OEI on VEA/REA survey, draft cover memo to respondents for Emily to send out.
TOTAL:			17.75	

JLC Consulting, LLC
52 Bent Creek Road
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-20.01*
Invoice Date: *April 30, 2020*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services	Amount		
Services Performed 04/01/2020 through 04/30/2020			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	5.00	\$195.00	\$975.00
LABOR - Travel Hours	0.00	\$97.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$975.00</u>

LC Consulting, LLC

Services Performed 01/01/2020 through 04/30/2020

Open Period

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning & Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
4/2/20	RI monthly prep and call - discussion of planning for post-covid EE drive		2.50				2.50	0.00	2.50
4/9/2020	Telecon with Grid regarding HVAC training ops	1.50					1.50	0.00	1.50
4/30/2020	Data Review and questions			1.00			1.00	0.00	1.00
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	1.50	2.50	1.00	0.00	0.00	5.00	0.00	5.00
	Total Amount	\$2,250	\$775.00	\$1,500	\$0.00	\$0.00	\$75.00	0.00	\$75.00

Ralph Prah
7613 Whitebridge Glen, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 14
Invoice Date: May 3, 2020
OEI Project #: 7345

Work Performed for National Grid USA Service Company

Description of Services	Amount		
Services Performed 3/01/20 through 4/30/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	34.25	\$195.00	\$6,678.75
TOTAL DUE			<u>\$6,678.75</u>

Ralp Pra
Services Performed 3/01/20 through 4/30/20

Date	Description of Services	001 - Policy & Strategy	002- Cyclical Planning & Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Total Hours
3/1/2020	res ltg shelf stocking study	0.25				0.25
3/4/2020	C&I studies check-in call; res ltg shelf stocking study;	1.25				1.25
3/6/2020	query from Adam on ADR	0.25				0.25
3/9/2020	codes issues; heat pump study instrs;	0.75				0.75
3/10/2020	res retro studies; HP study	0.50				0.50
3/11/2020	hp study; res retro studies	0.50				0.50
3/12/2020	res retro studies, HP study	0.25				0.25
3/16/2020	codes studies, e-mail mgmt	0.25				0.25
3/18/2020	res retro studies call + prep	1.75				1.75
3/19/2020	codes and standards call + prep	1.25				1.25
3/20/2020	res retro studies	0.25				0.25
3/25/2020	res studies check-in call; C&I on-site report	1.75				1.75
3/26/2020	C&I custom impact evals	0.25				0.25
3/27/2020	C&I custom electric impact eval conf call w/Ngrid + prep	1.00				1.00
3/30/2020	retro studies SOWs; heat pump study (instrs); C&I baseline report; 2020 workforce study (instr)	2.75				2.75
3/31/2020	res retro studies SOWs; C& on-site report; heat pump study instr;	2.75				2.75
4/1/2020	C&I studies call; heat pump study (conf call + prep)	2.50				2.50
4/3/2020	C&I baseline report; heat pump study; potential study pres	1.75				1.75
4/4/2020	on-site report	0.25				0.25
4/6/2020	NTG study, res retro studies SOWs	0.50				0.50
4/8/2020	one pager summaries; C&I on-site report; retrofit and behavior SOWs;	0.50				0.50
4/10/2020	code compliance study work plan; 2020 workforce report;	1.75				1.75
4/12/2020	CCEI workplan	0.75				0.75
4/13/2020	workforce report; heat pump study instrs;	0.75				0.75
4/14/2020	heat pump study	0.25				0.25
4/15/2020	c&I NTG study (conf call)	0.50				0.50
4/16/2020	heat pump study, code compliance study (SOW, call w/Phil)	1.75				1.75
4/18/2020	codes study; heat pump study;	0.50				0.50
4/19/2020	res retro studies (revised SOW, NTG memo, intvw guide)	1.25				1.25
4/21/2020	res retro studies (SOW, intvw guide, NTG memo); HP study; codes study	1.00				1.00
4/22/2020	mtg prep; behavioral study	0.50				0.50
4/23/2020	res ltg sales tracking study; hp study; retrofit studies; behavioral study	0.75				0.75
4/26/2020	codes study; Covid-19 mitigation C&I	0.25				0.25
4/29/2020	HERs study; gas peak demand study; res studies check-in call	2.00				2.00
4/30/2020	codes issues; hp study; gas peak demand study	1.00				1.00
						0.00
	Total Hours	31.25	0.00	0.00	0.00	31.25
	Total Amount	\$6,671.75	\$0.00	\$0.00	\$0.00	\$6,671.75

Rachel Sholly
48 Hudson Street
Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 28
Invoice Date: April 30, 2020
OEI Project #: 7345

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 04/01/20 through 04/30/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	38.25	\$148.00	\$5,661.00
LABOR - Travel Hours	0.00	\$74.00	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$5,661.00</u>

Raciel Solly

Services Performed 04/01/20 through 04/30/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
4/7/2020	Drafted CHP survey & call agenda, emailed call materials, prepped for call; Reviewed MPS CHP results; CHP planning call & follow-up			4.75			4.75	0.00	4.75
4/10/2020	Annual Report communications			0.50			0.50	0.00	0.50
4/13/2020	Finalized CHP survey, sent to Becca			2.25			2.25	0.00	2.25
4/14/2020	CHP mtg planning & communications			0.50			0.50	0.00	0.50
4/16/2020	CHP mtg planning & communications; Annual report call w/John R., follow-up communications			1.25			1.25	0.00	1.25
4/21/2020	CHP mtg registration & survey mgmt; MPS communications; Annual Report slides, graphs & communications			2.25			2.25	0.00	2.25
4/22/2020	Annual report development			5.25			5.25	0.00	5.25
4/23/2020	CHP mtg planning & communications; Annual report formatting			3.75			3.75	0.00	3.75
4/24/2020	Annual report formatting			4.75			4.75	0.00	4.75
4/25/2020	Annual Report data insertion			2.00			2.00	0.00	2.00
4/27/2020	CHP mtg planning, reg, survey; MPS draft report feedback call; Annual Report data insertion & formatting			5.75			5.75	0.00	5.75
4/28/2020	Annual Report data insertion & formatting			1.50			1.50	0.00	1.50
4/29/2020	Check-in w/Mike; CHP mtg planning			1.00			1.00	0.00	1.00
4/30/2020	Optimal audio test; Call w/Aren; EERMC meeting			2.75			2.75	0.00	2.75
	Total hours	0.00	0.00	31.25	0.00	0.00	31.25	0.00	31.25
	Total Amount	\$0.00	\$0.00	\$5,661.00	\$0.00	\$0.00	\$5,661.00	0.00	\$5,661.00

Invoice



May 31, 2020
Project No: 7345
Invoice No: 7019

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2020
PO #:

Professional Services from May 1, 2020 to May 31, 2020

Phase 001 Policy & Strategy

Optimal Staff

	Hours	Rate	Amount	
Belliveau, Eric	7.25	195.00	1,413.75	
Caesar, Adrian	3.75	130.00	487.50	
Guerard, Michael	27.75	195.00	5,411.25	
Jacobs, Adam	13.25	185.00	2,451.25	
Kravatz, Mark	4.00	185.00	740.00	
Mosenthal, Philip	2.00	195.00	390.00	
Totals	58.00		10,893.75	
Total Labor				10,893.75
		Total this Phase		\$10,893.75

Phase 002 Cyclical Planning & Reporting

Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	14.75	130.00	1,917.50	
Chant, Elizabeth	.50	195.00	97.50	
Guerard, Michael	59.75	195.00	11,651.25	
Jacobs, Adam	19.25	185.00	3,561.25	
Johnson, Craig	62.50	150.00	9,375.00	
Ross, Samuel	69.75	185.00	12,903.75	
Totals	226.50		39,506.25	
Total Labor				39,506.25

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020	Invoice	7019
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Subcontractors

Core Energy Insights Inc.	2,112.00	
JLC Consulting, LLC	2,242.50	
Energy Futures Group, Inc.	7,512.50	
Total Subcontractors	11,867.00	11,867.00
	Total this Phase	\$51,373.25

Phase	003	EERMC Oversight - EMV
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Optimal Staff

	Hours	Rate	Amount	
Guerard, Michael	10.25	195.00	1,998.75	
Jacobs, Adam	5.75	185.00	1,063.75	
Johnson, Craig	16.25	150.00	2,437.50	
Kravatz, Mark	4.00	185.00	740.00	
Mosenthal, Philip	5.25	195.00	1,023.75	
Totals	41.50		7,263.75	
Total Labor				7,263.75

Subcontractors

Rachel Sholly	3,626.00	
George Lawrence	1,803.75	
Total Subcontractors	5,429.75	5,429.75
	Total this Phase	\$12,693.50

Phase	004	EERMC Oversight - Education/Stakeholders
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Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	2.25	130.00	292.50	
Guerard, Michael	.25	195.00	48.75	
Totals	2.50		341.25	
Total Labor				341.25
	Total this Phase			\$341.25

Phase	005	Intern
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Fixed Fees

Monthly Intern Fee (May 2020)	2,272.73	
Total Fixed Fees	2,272.73	2,272.73
	Total this Phase	\$2,272.73

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020	Invoice	7019
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Billing Limits	Current	Prior	To-Date	
Total Billings	77,574.48	321,833.69	399,408.17	
Limit			945,000.00	
Remaining			545,591.83	
		Total this Invoice		\$77,574.48

Billings to Date

	Current	Prior	Total
Labor	58,005.00	252,492.50	310,497.50
Subcontractor	17,296.75	59,923.00	77,219.75
Expense	0.00	2,600.00	2,600.00
Add-on	2,272.73	6,818.19	9,090.92
Totals	77,574.48	321,833.69	399,408.17

Project 7345 Rhode Island EERMC - 2020 Invoice 7019

Billing Backup

Friday, June 12, 2020

Optimal Energy Inc.

Invoice 7019 Dated 5/31/2020

10:33:44 AM

Phase 001 Policy & Strategy

Optimal Staff

			Hours	Rate	Amount
Belliveau, Eric	5/4/2020	read prep docs for pims disc, disc with MG on same	1.00	195.00	195.00
Belliveau, Eric	5/5/2020	read Beccas updated meeting agenda, disc with MG to prep, attend PIMs call, debrief.	2.25	195.00	438.75
Belliveau, Eric	5/6/2020	project planning with MG and CJ, quick update on PIMs docket	.50	195.00	97.50
Belliveau, Eric	5/7/2020	check in with MG on various issues in couding FCM, AESC, IMS	.50	195.00	97.50
Belliveau, Eric	5/21/2020	call with MG on PIMs, virtual audit EMV, outcomes, contractor experience in and dates to get into the field, review Becca email materials	1.25	195.00	243.75
Belliveau, Eric	5/22/2020	pims conversation and prep with MG	1.75	195.00	341.25
Caesar, Adrian	5/1/2020	DPUC Data Request QA/QC, Res/C&I/Muni Financing Gaps review meeting, editing for distribution	2.50	130.00	325.00
Caesar, Adrian	5/4/2020	Financing gaps analysis updates, feedback review and draft finalization	1.25	130.00	162.50
Guerard, Michael	5/1/2020	Fianlize/submit PUC DR responses w SR; prep for PIMS mtg	4.25	195.00	828.75
Guerard, Michael	5/4/2020	PIMs prep with EB	1.00	195.00	195.00
Guerard, Michael	5/5/2020	PIMs call w Grid/OER, prep calls w/BT, EB, follow-up tasks	2.75	195.00	536.25
Guerard, Michael	5/6/2020	Redline 3YP Outline and send to Grid; EERMC mtg prep -- coord w Sam on bill impact presentation; p[rep for TWG mtg; review PUC Open mtg notice on Targets, PIMs	1.75	195.00	341.25
Guerard, Michael	5/7/2020	OER/C-Team chk in	1.00	195.00	195.00
Guerard, Michael	5/8/2020	TWG mtg; PUC Open mtg on Targets/PIMs, debriefs w OER	2.75	195.00	536.25
Guerard, Michael	5/15/2020	EERMC mtg prep, doc dev	1.25	195.00	243.75
Guerard, Michael	5/21/2020	EERMC mtg, prep and debriefs; PIMs mtg prep call w EB	4.25	195.00	828.75
Guerard, Michael	5/22/2020	OER/C-Team/Div bi-weekly check-in, follow-up tasks; PIMs mtg w OER/Grid/Div, prep and debriefs; EERMC mtg follow-up tasks	4.75	195.00	926.25

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020			Invoice	7019
Guerard, Michael		5/29/2020	4.00	195.00	780.00	
		Review LCP standards update; prep for PIMs and 1-1 mtgs upcoming; aborted Workforce Deep Dive call				
Jacobs, Adam		5/1/2020	2.00	185.00	370.00	
		-C&I data report Q1 questions for sector call -biogas CHP project custom electric project -1/2 upstream lighting call				
Jacobs, Adam		5/4/2020	1.00	185.00	185.00	
		-CHP stakeholder meeting coordination -follow-up w/ Grid on C&I sector call				
Jacobs, Adam		5/5/2020	1.00	185.00	185.00	
		-1/2 call w/ Uplight (formerly First Fuel) on C&I remote audits -CHP meeting planning follow-ups -1/2 NE EE consultant call				
Jacobs, Adam		5/6/2020	2.25	185.00	416.25	
		-C&I sector call meeting materials and agenda distribution -C&I sector prep/planning discussion w/ Mike				
Jacobs, Adam		5/7/2020	1.75	185.00	323.75	
		-RI C&I sector team call				
Jacobs, Adam		5/13/2020	2.00	185.00	370.00	
		-CHP meeting prep -drafting CHP survey response PPT				
Jacobs, Adam		5/14/2020	2.25	185.00	416.25	
		-review draft Grid CHP slides -annual CHP meeting				
Jacobs, Adam		5/29/2020	1.00	185.00	185.00	
		-upstream lighting call				
Kravatz, Mark		5/4/2020	1.00	185.00	185.00	
		Mtg: Res Sector Prep;				
Kravatz, Mark		5/5/2020	2.50	185.00	462.50	
		Correspondence: Emily and Richard re: VEA/REA survey; Task: organize and prepare res sector related materials for Margie; REview updates VEA/REA tables and survey;				
Kravatz, Mark		5/14/2020	.50	185.00	92.50	
		RI Team check-in;				
Mosenthal, Philip		5/4/2020	.25	195.00	48.75	
		codes savings policy				
Mosenthal, Philip		5/28/2020	1.75	195.00	341.25	
		CCEI planning conf., ph w/ MG and emails re doc reviews, coord.				
		Totals	58.00		10,893.75	
		Total Labor				10,893.75
				Total this Phase		\$10,893.75

Phase 002 Cyclical Planning & Reporting

Optimal Staff

Hours Rate Amount

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020		Invoice	7019
Caesar, Adrian		5/14/2020	3.25	130.00	422.50
		Financing Memo v2 and gaps analysis revisions, gap mitigation research			
Caesar, Adrian		5/19/2020	2.50	130.00	325.00
		Residential Financing gap mitigation research and analysis			
Caesar, Adrian		5/22/2020	2.75	130.00	357.50
		Residential gap mitigation analysis, memo and gaps analysis document distribution for Res/C&I mtgs			
Caesar, Adrian		5/26/2020	2.50	130.00	325.00
		C&I financing gap mitigation analysis finalization, Res financing gap mitigation analysis			
Caesar, Adrian		5/27/2020	3.00	130.00	390.00
		C&I financing meeting, residential gaps mitigation analysis			
Caesar, Adrian		5/28/2020	.75	130.00	97.50
		Residential Financing Meeting			
Chant, Elizabeth		5/11/2020	.50	195.00	97.50
		meet with Johnson and Kravatz on IE transition			
Guerard, Michael		5/1/2020	2.00	195.00	390.00
		Discussion with Grid/OER/Division on Gas bill impacts; prep for 3YP planning w team; prelim review of comments on MPS from Division/Synapse			
Guerard, Michael		5/5/2020	3.00	195.00	585.00
		3YP planning call w OER/Grid to discuss BC/MPS mapping tool; team coord on planning strategies, scheduling			
Guerard, Michael		5/6/2020	2.50	195.00	487.50
		C&I prep mtg; Team call on Remote Audit presentation for Strategy mtg; coord. scheduling and planning objectives; team prep for rez sector mtg			
Guerard, Michael		5/7/2020	4.75	195.00	926.25
		Rez Sector monthly meeting; C&I monthly sector mtg; Codes mtg			
Guerard, Michael		5/8/2020	2.25	195.00	438.75
		Planning and prep for rez sector 3YP mtgs			
Guerard, Michael		5/11/2020	4.00	195.00	780.00
		Rez sector 3YP mtgs w Angela's team, prep and debriefs			
Guerard, Michael		5/12/2020	4.00	195.00	780.00
		Rez program 3YP GoTo mtg, prep and debriefs; prep w OER on mod income			
Guerard, Michael		5/13/2020	4.00	195.00	780.00
		Rez sector 3YP mtg on Mod income w Grid/OER; 3YP meeting debriefs, follow-up tasks			
Guerard, Michael		5/14/2020	2.25	195.00	438.75
		MF deep dive, prep and debriefs			
Guerard, Michael		5/15/2020	4.25	195.00	828.75
		C&I Deep Dive planning call w Grid; CHP mtg debriefs; BP research for both rez and C&I			
Guerard, Michael		5/19/2020	3.00	195.00	585.00
		Rez debriefs, planning next steps; C&I sector comps; updates on BC/MPS mapping			
Guerard, Michael		5/20/2020	5.25	195.00	1,023.75
		SRP TWG mtg; 3YP planning updates w CJ; MPS review			
Guerard, Michael		5/21/2020	3.00	195.00	585.00
		BC/MPS mapping plan w CJ, SR; C&I strategy call; IE BP call			

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Project	7345	Rhode Island EERMC - 2020			Invoice	7019
Guerard, Michael		5/22/2020	2.00	195.00		390.00
		C&I Deep Dive call w Grid; prep for next week's cross-sector mtgs				
Guerard, Michael		5/26/2020	3.75	195.00		731.25
		Send out 1-1 mtg requests to ind. council members; Mtg prep, review/edit docs on financing, BC map; team coord and updates				
Guerard, Michael		5/27/2020	4.50	195.00		877.50
		Prep for cross-sector mtgs; BP reseaxcrh on multiple areas; team updates				
Guerard, Michael		5/28/2020	5.25	195.00		1,023.75
		Rez Financing mtg w Grid/OER/Div, prep; C&S call w Grid/OER/Div; Rez and C&I internal team prep calls				
Jacobs, Adam		5/8/2020	.25	185.00		46.25
		-follow-up w/ Grid RI on availability for subsequent planning calls				
Jacobs, Adam		5/11/2020	.25	185.00		46.25
		-follow-up w/ Grid RE: C&I sector planning calls				
Jacobs, Adam		5/12/2020	3.00	185.00		555.00
		-follow-ups w/ Grid on 3YP meetings -scheduling 3YP meetings for C&I				
Jacobs, Adam		5/13/2020	1.75	185.00		323.75
		-coordinate and schedule C&I planning meetings w/ Division, Grid and OER -C&I planning agenda work				
Jacobs, Adam		5/14/2020	1.00	185.00		185.00
		-C&I planning lighting prep and agenda distribution				
Jacobs, Adam		5/15/2020	1.25	185.00		231.25
		-C&I lighting planning call + notes/follow-ups				
Jacobs, Adam		5/18/2020	1.25	185.00		231.25
		-notes and follow-ups from RI C&I planning call -agenda for RI planning session #2				
Jacobs, Adam		5/20/2020	.25	185.00		46.25
		-prep for C&I planning session #2				
Jacobs, Adam		5/21/2020	1.75	185.00		323.75
		-C&I planning session #2 -notes and follow-ups -agenda for planning session #3				
Jacobs, Adam		5/22/2020	1.00	185.00		185.00
		-Planning session #3 Industrial				
Jacobs, Adam		5/26/2020	2.50	185.00		462.50
		-notes and follow-ups from planning session #3 -review DNV GL SEM evaluation from Energy Trust of Oregon -RI planning session #4 + agenda, notes and follow-ups				
Jacobs, Adam		5/27/2020	3.00	185.00		555.00
		-C&I sector team prep call -review of initial C&I planning session notes for clear action items -prep for C&I finance -C&I finance call				
Jacobs, Adam		5/28/2020	1.00	185.00		185.00
		-Res/C&I check-in call -draft agenda for C&I sector call				
Jacobs, Adam		5/29/2020	1.00	185.00		185.00
		-workforce call -check-in w/ Ben				

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Project	7345	Rhode Island EERMC - 2020			Invoice	7019
Johnson, Craig		5/1/2020	7.00	150.00		1,050.00
		C&I Sector Team - Review and compile team questions. Prepare and distribute questions and data report to full strategy team.				
		Res Sector Team - Review and compile team questions. Prepare and distribute questions and data report to full strategy team.				
		Targets - Review PUC DRs on Targets. Prepare answers to DR 1.7. Emails w/ Sam about the same.				
		3YR Plan - Develop BC/MPS mappings for residential measures.				
Johnson, Craig		5/5/2020	6.75	150.00		1,012.50
		3YR Plan - Develop BC/MPS mappings for residential measures. Coordination call w/ NGrid, OER, and Division to review timeline of model development and BC/MPS mappings.				
		Res Sector Team - Internal prep call for monthly strategy meeting.				
Johnson, Craig		5/6/2020	3.25	150.00		487.50
		3YR Plan - QA/QC BC/MPS mappings for residential measures to ensure full coverage between models and to ensure no duplicates.				
		Res Sector Team - Coordinate and schedule program focused 3YR Plan meetings for next week, emails about the same.				
		C&I Sector Team - Prep for C&I strategy meeting w/ Mike and Adam.				
Johnson, Craig		5/7/2020	5.50	150.00		825.00
		Res Sector Team - Sector team call, associated prep and debrief. Discuss needs for agendas for program focused 3YR Plan meetings w/ Mike.				
		C&I Sector Team - Sector team call, associated prep and debrief.				
		Website - Update CHP meeting, and post updated agenda.				
		Council Meeting - Set up new GoToMeeting info for May Council meeting.				
		3YR Plan - Prepare BC/MPS mappings for distribution. Emails w/ Sam about the same.				
Johnson, Craig		5/8/2020	7.00	150.00		1,050.00
		Res Sector Team - Draft agendas and materials for program focused 3YR Plan meetings. Review w/ Mike and iterate on agenda items. Distribute agendas, materials and assignments for 5/11 and 5/12 meetings.				
		3YR Plan - Distribute BC/MPS mappings.				
		Targets - Follow PUC meeting on PIMs and Targets. Debrief w/ Mike, Sam and Becca.				
Johnson, Craig		5/10/2020	.25	150.00		37.50
		Sector Teams - Follow-up w/ Laura on a couple questions that were raised during previous res sector call.				
Johnson, Craig		5/12/2020	4.25	150.00		637.50
		3YR Planning - Residential program meeting on IES SF, HVAC, and NC. Prep for C&I strategy calls w/ Adam. Internal prep meeting for upcoming moderate income discussion.				
Johnson, Craig		5/13/2020	3.00	150.00		450.00
		-3YR Planning - prep for residential meeting on multifamily programs. Review residential meeting agendas and work with Adam on agenda design for C&I meetings. Review notes from residential meetings. Meeting on moderate income strategy.				
Johnson, Craig		5/14/2020	4.00	150.00		600.00
		3YR Planning - Review and write up notes from 5/11 and 5/12 meetings. Conduct MF Programs meeting and debrief w/ Mike and Margie. Schedule res meeting debrief with internal team and OER. Cancel and work on rescheduling Codes & Standards meeting.				
Johnson, Craig		5/15/2020	2.50	150.00		375.00

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Project	7345	Rhode Island EERMC - 2020		Invoice	7019
		3YR Planning - Review action items and next steps from res planning meetings w/ Mike. Website - Review Council website responsibilities w/ Adrian. Council Meeting - Work on 2019 Year End Results presentation.			
Johnson, Craig	5/18/2020		6.00	150.00	900.00
		3YR Plan - Review and discuss notes, action items, and next steps from res calls w/ Mike. REview BC/MPS Comparison Tool and discuss features and next steps. Council Meeting - Prepare CHP attendee list for Rachel's memo to Council. Prepare slides for 2019 Year-End Report presentation. Prepare updated graphs for EERMC Annual Report. Review Year-End Report.			
Johnson, Craig	5/19/2020		.50	150.00	75.00
		3YR Planning - RI Res meetings debrief with internal team.			
Johnson, Craig	5/21/2020		4.00	150.00	600.00
		3YR Planning - Coordinate scheduling of res/C&I finance and workforce development meetings. Review NGrid comments on BC/MPS mapping. Meeting w/ Biran to discuss tasks related to IES vs. Market Rate SF and MF comparisons. Sector Teams - Reschedule internal res c-team check-in call. Council Meeting - attend and present at Council meeting. Prep for presentation.			
Johnson, Craig	5/22/2020		1.00	150.00	150.00
		3YR Planning - Coordinate schedules and set up meetings for residential financing, C&I financing, and Workforce Development.			
Johnson, Craig	5/26/2020		3.75	150.00	562.50
		3YR Planning - Review NGrid comments on BC/MPS measure mapping, discussion w/ Mike and Sam about the same. Check-in w/ Brian on IES/Market rate research. Work on and check-in w/ Mike on codes & standrads meeting agenda and materials. Sector Teams - schedule internal prep meetings ahead of upcoming res sector team call.			
Johnson, Craig	5/27/2020		.50	150.00	75.00
		Sector Teams - C&I internal team prep call for next week's C&I Strategy meeting.			
Johnson, Craig	5/28/2020		3.25	150.00	487.50
		3YR Planning - Residential finance and Codes & Standards meetings. Sector Teams - Internal RI Res team prep call. Coordinate w/ Adam and Mike on Res and C&I sector team meeting agendas.			
Ross, Samuel	5/1/2020		7.00	185.00	1,295.00
		PUC Data request finalization; natural gas rate and bill impacts model call; financing gaps analysis review			
Ross, Samuel	5/4/2020		.50	185.00	92.50
		financing gaps analysis review, feedback.			
Ross, Samuel	5/5/2020		7.00	185.00	1,295.00
		reviewing draft MPS report documents; call re: 3 yr planning, prep and follow-up re: same; finance gaps analysis rough draft final review			
Ross, Samuel	5/6/2020		5.50	185.00	1,017.50
		final MPS doc review; C&I BC MPS Mapping review and clean-up;			
Ross, Samuel	5/7/2020		2.00	185.00	370.00
		BC MPS mapping review; Appendix G feedback			
Ross, Samuel	5/8/2020		2.50	185.00	462.50
		PUC Hearing, Debrief, follow-ups			
Ross, Samuel	5/13/2020		2.25	185.00	416.25
		Slide and technical prep for CHP annual meeting; working on mapping tool			
Ross, Samuel	5/14/2020		3.50	185.00	647.50

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Project	7345	Rhode Island EERMC - 2020		Invoice	7019
		CHP Annual meeting; prep; follow-up; mapping tool work			
Ross, Samuel		5/15/2020	3.25	185.00	601.25
		prep slides for council meeting re: rate and bill impacts			
Ross, Samuel		5/18/2020	5.75	185.00	1,063.75
		finalizing slides for council meeting; mapping tool work, meeting re: same; debrief with Mike			
Ross, Samuel		5/19/2020	2.00	185.00	370.00
		MPS BC mapping tool			
Ross, Samuel		5/20/2020	5.00	185.00	925.00
		continued work on BC MPS mapping tool; DR updated results review; review SRP materials; disc. re same with Mike			
Ross, Samuel		5/21/2020	9.50	185.00	1,757.50
		May Council meeting; prep; follow-up; review of final MPS report; coordination re: SRP and EM&V work moving forward; review and expansion of MPS BC model mapping functionality			
Ross, Samuel		5/26/2020	3.50	185.00	647.50
		BC MPS mapping tool work; memo re: same			
Ross, Samuel		5/27/2020	5.00	185.00	925.00
		C&I financing call + prep & follow up; intergenerational equity/declining discount rates work; coord. w/Cadmus re: heat pump mkt assessment			
Ross, Samuel		5/28/2020	5.50	185.00	1,017.50
		res financing call, prep and follow up; intergenerational equity/declining discount rates work			
		Totals	226.50		39,506.25
		Total Labor			39,506.25
				Total this Phase	\$51,373.25

Phase	003	EERMC Oversight - EMV			
Optimal Staff			Hours	Rate	Amount
		5/4/2020	1.00	195.00	195.00
		DNV GL call on COVID impacts on EMV			
Guerard, Michael		5/6/2020	1.25	195.00	243.75
		C&I monthly EMV call			
Guerard, Michael		5/8/2020	1.50	195.00	292.50
		Call w Grid, vendor, on COVID impacts on EMV			
Guerard, Michael		5/15/2020	1.75	195.00	341.25
		Review mulkitple EMV rpeort drafts/comments			
Guerard, Michael		5/18/2020	2.25	195.00	438.75
		EMV review, 3YP impact discussions, chk-ins w team			
Guerard, Michael		5/26/2020	1.00	195.00	195.00
		Review multiple study comments/drafts.			
Guerard, Michael		5/27/2020	1.50	195.00	292.50
		Monthly Rez EMV call, prep			
Jacobs, Adam		5/4/2020	1.25	185.00	231.25
		-C-Team, National Grid, DNV GL Conversation about COVID and projects			
		-follow-up call w/ Mike			

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Project	7345	Rhode Island EERMC - 2020			Invoice	7019
Jacobs, Adam		5/6/2020	1.75	185.00		323.75
		-RI Upstream Lighting Scoping Memo notes				
		-RI EMV call				
		-1/2 of ACEEE SEM&V: 2020 State of the Union webinar				
Jacobs, Adam		5/8/2020	.25	185.00		46.25
		-C&I Upstream Lighting prep document note on wirelessly controllable TLED research				
Jacobs, Adam		5/18/2020	.75	185.00		138.75
		-Final RI EE workforce study review and note on EE customer training				
		-C&I NTG survey docs review and comments				
		-Typology Analysis for fuel switching study review and comments				
Jacobs, Adam		5/22/2020	.25	185.00		46.25
		-RI ASHP installer survey - online survey option				
Jacobs, Adam		5/26/2020	.50	185.00		92.50
		-follow-up on C&I NTG survey				
Jacobs, Adam		5/27/2020	.25	185.00		46.25
		-C&I upstream lighting NTG study follow-ups				
Jacobs, Adam		5/29/2020	.75	185.00		138.75
		-custom gas eval report review				
Johnson, Craig		5/14/2020	1.50	150.00		225.00
		Heat Pump Typology Analysis Meeting. Review meeting materials.				
Johnson, Craig		5/15/2020	1.00	150.00		150.00
		Coordinate comments for RI Retrofit and Behavior Studies. Review stakeholder IDI Guide and Impact Analysis Plan for Res Retrofit Study.				
Johnson, Craig		5/18/2020	2.00	150.00		300.00
		Review documents for Res Retrofit, Shelf Stocking Study, and C&I NTG Study. Send reminders for comments to C-Team and OER. Review One-Pagers for 2016 C&I Customer Electric and Gas Impact Evaluation.				
Johnson, Craig		5/19/2020	1.50	150.00		225.00
		Review CCEI Work Plan. Meeting to discuss NMR CCEI Study workplan.				
Johnson, Craig		5/20/2020	1.00	150.00		150.00
		Reschedule monthly Res and C&I EM&V meetings. Introductions with NGrid EM&V team leads.				
Johnson, Craig		5/22/2020	2.75	150.00		412.50
		Coordinate final comments on Res Retrofit and C&I NTG study documents and distribute those back to the vendor. Coordinate deliverable deadlines for comments on Res Lighting Market Assessment SOW. Review study documents.				
Johnson, Craig		5/27/2020	1.75	150.00		262.50
		Monthly RI Residential EM&V meeting and meeting prep.				
Johnson, Craig		5/29/2020	4.75	150.00		712.50
		Prep for next week's C&I EM&V call. Review/compile comments for RI Shelf Stocking Survey Draft Report. Review/distribute updated 2020 Codes Study workplan for internal review. Review/compile comments for RI Lighting Sales Data Analysis. Review/Distribute updated 2017 Custom Gas Evaluation Report for internal Review. Review updated 1-page summaries for 2016 Custom Electric and Gas, Upstream Lighting, and small biz impact studies. Meeting to discuss Codes & Standards Gross Savings methodology.				
Kravatz, Mark		5/5/2020	1.00	185.00		185.00
		Correspondence/Comments re: Custom Gas 2016 study; Res Retrofit; C&I Upstream; Custom Gas 2017;				
Kravatz, Mark		5/6/2020	2.75	185.00		508.75

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Project	7345	Rhode Island EERMC - 2020		Invoice	7019
	Task: Review EMV tracker and prep agenda; Mtg: C&I EMV; MTg: Ralph; Correspondence: Ben Crosby re: EMV team logistics;				
Kravatz, Mark	5/11/2020	.25	185.00	46.25	
	Correspondence: re: retrofit study; Custom Gas 2017;				
Mosenthal, Philip	5/7/2020	2.00	195.00	390.00	
	rev. codes/standards emv frameworks, conf. re same				
Mosenthal, Philip	5/8/2020	.75	195.00	146.25	
	CCEI emv docs rev/comment, covid disc.				
Mosenthal, Philip	5/19/2020	1.00	195.00	195.00	
	conf. re CCEI workplan				
Mosenthal, Philip	5/29/2020	1.50	195.00	292.50	
	emails and ph. re codes emv, conf. re same				
	Totals	41.50		7,263.75	
	Total Labor				7,263.75
			Total this Phase		\$12,693.50

Phase	004	EERMC Oversight - Education/Stakeholders			
Optimal Staff					
			Hours	Rate	Amount
Caesar, Adrian	5/18/2020	.50	130.00	65.00	
	EERMC meeting materials upload				
Caesar, Adrian	5/19/2020	.25	130.00	32.50	
	EERMC materials upload				
Caesar, Adrian	5/21/2020	1.50	130.00	195.00	
	EERMC site updates and materials uploads				
Guerard, Michael	5/6/2020	.25	195.00	48.75	
	Chk-in w Rachel on Education call				
	Totals	2.50		341.25	
	Total Labor				341.25
			Total this Phase		\$341.25
			Total this Project		\$75,301.75
			Total this Report		\$75,301.75

George Lawrence, Caerbannog Consulting
3540 Mountain Rd
Addison VT 05491

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 18
Invoice Date: May 31, 2020
OEI Project #: 7345

Work Performed for Rhode Island EERMC

Description of Services		Amount	
Services Performed 05/01/20 through 05/31/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	9.75	\$185.00	\$1,803.75
LABOR - Travel Hours	0.00	\$92.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$1,003.75</u>

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
5/1/20	Lighting call with National Grid			0.50			0.50	0.00	0.50
5/5/2020	.25 hr review Upstream evaluation			0.25			0.25	0.00	0.25
5/7/2020	1.75 hr Check in call with National Grid, .25 hr follow up			2.00			2.00	0.00	2.00
5/12/2020	Planning for 3 Yr Plan calls			0.25			0.25	0.00	0.25
5/13/2020	Planning for 3 Yr Plan calls			0.25			0.25	0.00	0.25
5/14/2020	.5 hr call, .25 hr revise talking points for 3 year plan call			0.75			0.75	0.00	0.75
5/15/2020	1 hr Call with Grid: 3 yr planning for lighting			1.00			1.00	0.00	1.00
5/18/2020	Review NTG and RR rates for lighting			0.25			0.25	0.00	0.25
5/21/2020	1 hr 3 yr Plan call with Grid: Small Business, .5 hr follow up			1.50			1.50	0.00	1.50
5/22/2020	1 hr 3 yr Plan call with Grid: CHP and industrial, .25 hr follow up			1.25			1.25	0.00	1.25
5/26/2020	1 hr 3 yr Plan call with Grid: Customer engagement			1.00			1.00	0.00	1.00
5/27/2020	Consultant team call to discuss 3 yr plan			0.50			0.50	0.00	0.50
5/29/2020	Lighting call with National Grid			0.25			0.25	0.00	0.25
							0.00	0.00	0.00
	Total hours	0.00	0.00	17.75	0.00	0.00	17.75	0.00	17.75
	Total Amount	\$0.00	\$0.00	\$1,037.50	\$0.00	\$0.00	\$1,037.50	0.00	\$1,037.50

Margie Lynch/Core Energy Insights, Inc.
111 Hooksett Road, Auburn, NH 03032

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 5-2020*
Invoice Date: *May 31, 2020*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services	Amount
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Services Performed 05/05/2020 through 05/31/2020

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	12.00	\$176.00	\$2,112.00

TOTAL DUE

\$2,112.00

Margie Lync Core Energy Insights, Inc.
Services Performed 05/05/2020 through 05/31/2020

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
5/6/20	Scanned RI March data; participated in res program overview meeting w/M. Guerard & M. Cravatz		1.25				1.25	0.00	1.25
5/7/2020	Reviewed 2018-2020 Plan and 2020 Annual Plan; participated in Res Sector meeting		3.00				3.00	0.00	3.00
5/11/2020	Prepared for and participated in 2021-2023 res planning meeting		3.50				3.50	0.00	3.50
5/12/2020	Prepared for and participated in moderate income discussion with OER staff		1.00				1.00	0.00	1.00
5/13/2020	Participated in MF planning meeting		2.00				2.00	0.00	2.00
5/19/2020	Participated in planning meetings debrief		0.50				0.50	0.00	0.50
5/28/2020	Participated in internal res team planning meeting		0.75				0.75	0.00	0.75
							0.00	0.00	0.00
	Total hours	0.00	12.00	0.00	0.00	0.00	12.00	0.00	12.00
	Total Amount	\$0.00	\$2,112.00	\$0.00	\$0.00	\$0.00	\$2,112.00	0.00	\$2,112.00

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Invoice

TO: Optimal Energy Inc.
April Clodgo
10600 Route 116, Suite 3
Hinesburg, VT 05461
clodgo@optenergy.com

Invoice #:4037
Invoice Date: 6/5/2020
Invoice Period: 5/1/2020-5/31/2020
Job Name: RI EERMC
Terms: Net 30 Days
PO # 3200362251

Consultant Labor	Job-Phase-Project	Project Description	Rate	Hours	Amount
Dan Mellinger	4104-00-02	Cyclical Planning & Reporting Activities	\$185.00	9.25	\$1,711.25
Glenn Reed	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	16.75	\$3,266.25
Richard Faesy	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	13.00	\$2,535.00
EFG Labor Subtotal:				39.00	\$7,512.50

TOTAL DUE THIS INVOICE: \$7,512.50 USD

Energy Futures Group, Inc.

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Fax: (802) 329-2143



Task Description

Invoice #:4037
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 5/1/2020-5/31/2020
Consultant: Dan Mellinger

Date	Phase-Project	Project Description	Hours Task Description
5/1/2020	00-02	Cyclical Planning & Reporting Activities	1.75 Finish agenda prep; Lighting call with NGrid; meeting notes and action items
5/12/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Coordinate schedules for 3-yr plan lighting discussion
5/13/2020	00-02	Cyclical Planning & Reporting Activities	0.50 3-yr plan scheduling discussions with Adam
5/14/2020	00-02	Cyclical Planning & Reporting Activities	0.75 3-yr plan discussion with Adam and George; follow-up emails
5/15/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Review Adam's agenda for 3-yr plan lighting meeting; attend lighting planning call
5/19/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Review Adam's notes and follow-up items
5/22/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Explore Encentiv database to help inform program strategies
5/26/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Contact Ben about lighting data
5/27/2020	00-02	Cyclical Planning & Reporting Activities	1.00 C&I sector prep call and follow-up emails; attend ICF webinar on C&I program strategies during COVID-19 (15 min)
5/28/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Set agenda
5/29/2020	00-02	Cyclical Planning & Reporting Activities	2.00 RI lighting prep, call, and distribute notes
TOTAL:			9.25

Energy Futures Group, Inc.

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Task Description

Invoice #:4037
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 5/1/2020-5/31/2020
Consultant: Glenn Reed

Date	Phase-Project	Project Description	Hours Task Description
5/1/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Review Apex Analytics 2019 Lighting sales data analysis
5/4/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Review of April TRC lighting and appliance invoice numbers
5/4/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Q1 Data report: RNC
5/5/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Detailed analysis of April lighting data
5/8/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Grid call data follow up
5/8/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Regional call on Covid-19 and EE planning
5/11/2020	00-02	Cyclical Planning & Reporting Activities	3.50 RI Three-Year Planning call, prep and questions for Grid
5/12/2020	00-02	Cyclical Planning & Reporting Activities	2.25 Continued RI Three-year planning discussions, prep and follow up
5/14/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Attend all-electric MF DHW presentation
5/15/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Review and comments on Impact Analysis Pkan, revised Steeholder IDDI Guide comments
5/15/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Review and comment on Stakeholder IDI guide
5/19/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Debrief of RI Res. Call w/Grid
5/21/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review of draft Shelf Sttocking Survey Report, question to Grid
5/21/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Follow up on RI Three-year Plan: HVAC and DHW savings contributions, review of measure mapping and Dunskey presentation
5/27/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Monthly RI EM&V call
5/28/2020	00-02	Cyclical Planning & Reporting Activities	2.75 Review and comment of Shelf Survey draft report and Sales data analysis SOW

5/29/2020

00-02

Cyclical Planning &
Reporting Activities

0.75 Comments on lighting sales data analysis SOW

TOTAL:

16.75

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4037
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 5/1/2020-5/31/2020
Consultant: Richard Faesy

Date	Phase-Project	Project Description	Hours Task Description
5/1/2020	00-02	Cyclical Planning & Reporting Activities	0.25 RI data review
5/1/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Review RI data
5/5/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Follow up survey review, C-Team prep call
5/6/2020	00-02	Cyclical Planning & Reporting Activities	1.00 REA/VEA PPT develop
5/7/2020	00-02	Cyclical Planning & Reporting Activities	2.25 REA/VEA PPT, Res meeting with Ngrid
5/8/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Survey to OEI
5/11/2020	00-02	Cyclical Planning & Reporting Activities	3.00 Opower virtual audit tool demo, Plan planning meeting with Grid to review EW, lighting, product, HER, etc.
5/12/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Program review planning
5/14/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Heat pump typology with Cadmus and Grid eval group
5/19/2020	00-02	Cyclical Planning & Reporting Activities	2.00 Grid Planning meeting debrief, NE Consultants call (split with CT)
TOTAL:			13.00

JLC Consulting, LLC
52 Bent Creek Road
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-2020.02*
Invoice Date: *May 31, 2020*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 05/01/20 through 05/31/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	11.50	\$195.00	\$2,242.50
LABOR - Travel Hours	0.00	\$97.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$2,242.50</u>

LC Consulting, LLC

Services Performed 05/01/20 through 05/31/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
5/1/20	Consulting Team Meeting questions and prep		0.50				0.50	0.00	0.50
5/7/2020	Ngrid meeting, prep and follow up		2.25				2.25	0.00	2.25
5/15/2020	prep for in depth planning calls		1.00				1.00	0.00	1.00
5/20/2020	Research program concepts for planning calls, prep		3.00				3.00	0.00	3.00
5/21/2020	Planning call small business, hvac, follow up		1.75				1.75	0.00	1.75
5/26/2020	Planning call prep, call and follow up - SEM, new construction		2.00				2.00	0.00	2.00
5/27/2020	3 year plan research and team call		1.00				1.00	0.00	1.00
							0.00	0.00	0.00
	Total hours	0.00	11.50	0.00	0.00	0.00	11.50	0.00	11.50
	Total Amount	\$0.00	\$2,212.50	\$0.00	\$0.00	\$0.00	\$2,212.50	0.00	\$2,212.50

Rachel Sholly
48 Hudson Street
Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 29
Invoice Date: May 31, 2020
OEI Project #: 7345

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 05/01/20 through 05/31/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	24.50	\$148.00	\$3,626.00
LABOR - Travel Hours	0.00	\$74.00	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$3,626.00</u>

Rachel Solly

Services Performed 05/01/20 through 05/31/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
5/4/2020	Communications re: edu call; CHP mtg planning; MPS draft feedback communications			1.75			1.75	0.00	1.75
5/6/2020	Prep & education call; CHP mtg planning			2.00			2.00	0.00	2.00
5/7/2020	Consolidated & sent MPS MT feedback on draft report; CHP mtg planning			3.25			3.25	0.00	3.25
5/11/2020	CHP mtg planning			0.50			0.50	0.00	0.50
5/13/2020	CHP mtg tech test & communications; Call w/Mike & Mark			2.00			2.00	0.00	2.00
5/14/2020	CHP mtg prep; CHP annual meeting			6.00			6.00	0.00	6.00
5/18/2020	Check-in w/Mike, CHP memo			4.50			4.50	0.00	4.50
5/21/2020	EERMC mtg			1.50			1.50	0.00	1.50
5/27/2020	Member 1-1 scheduling; Check-in w/Mike			1.00			1.00	0.00	1.00
5/28/2020	Prep for edu call; Annual report printing communications; Member 1-1 scheduling			2.00			2.00	0.00	2.00
	Total hours	0.00	0.00	21.50	0.00	0.00	21.50	0.00	21.50
	Total Amount	\$0.00	\$0.00	\$3,626.00	\$0.00	\$0.00	\$3,626.00	0.00	\$3,626.00

Invoice



June 30, 2020
Project No: 7345
Invoice No: 7029

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2020
PO #:

Professional Services from June 1, 2020 to June 30, 2020

Phase 001 Policy & Strategy

Optimal Staff

	Hours	Rate	Amount	
Belliveau, Eric	10.75	195.00	2,096.25	
Chant, Elizabeth	.75	195.00	146.25	
Guerard, Michael	55.00	195.00	10,725.00	
Jacobs, Adam	5.00	185.00	925.00	
Keating, Griffith	2.00	130.00	260.00	
Mosenthal, Philip	2.25	195.00	438.75	
Ross, Samuel	2.25	185.00	416.25	
Socks, Matthew	2.50	185.00	462.50	
Totals	80.50		15,470.00	
Total Labor				15,470.00

Subcontractors

Ralph Prah			7,653.75	
Total Subcontractors			7,653.75	7,653.75

Total this Phase \$23,123.75

Phase 002 Cyclical Planning & Reporting

Optimal Staff

	Hours	Rate	Amount
Caesar, Adrian	33.75	130.00	4,387.50

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020			Invoice	7029
	Guerard, Michael		37.75	195.00		7,361.25
	Jacobs, Adam		29.75	185.00		5,503.75
	Johnson, Craig		92.75	150.00		13,912.50
	Ross, Samuel		68.50	185.00		12,672.50
	Totals		262.50			43,837.50
	Total Labor					43,837.50

Subcontractors

Core Energy Insights Inc.					1,672.00	
Caerbannog Consulting, LLC					1,942.50	
JLC Consulting, LLC					1,901.25	
Energy Futures Group, Inc.					8,196.25	
Total Subcontractors					13,712.00	13,712.00
					Total this Phase	\$57,549.50

Phase 003 EERMC Oversight - EMV

Optimal Staff

	Hours	Rate	Amount	
Guerard, Michael	7.75	195.00	1,511.25	
Jacobs, Adam	3.50	185.00	647.50	
Johnson, Craig	17.50	150.00	2,625.00	
Mosenthal, Philip	.25	195.00	48.75	
Totals	29.00		4,832.50	
Total Labor				4,832.50

Subcontractors

Rachel Sholly				1,295.00	
Caerbannog Consulting, LLC				1,110.00	
Total Subcontractors				2,405.00	2,405.00
				Total this Phase	\$7,237.50

Phase 004 EERMC Oversight - Education/Stakeholders

Optimal Staff

	Hours	Rate	Amount		
Caesar, Adrian	2.50	130.00	325.00		
Guerard, Michael	1.75	195.00	341.25		
Totals	4.25		666.25		
Total Labor				666.25	
				Total this Phase	\$666.25

Phase 005 Intern

Project	7345	Rhode Island EERMC - 2020	Invoice	7029
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Optimal Staff

	Hours	Rate	Amount	
Duroha, Anya	16.00		0.00	
Totals	16.00		0.00	
Total Labor				0.00

Fixed Fees

Monthly Intern Fee (June 2020)	2,272.73	
Total Fixed Fees	2,272.73	2,272.73
	Total this Phase	\$2,272.73

Billing Limits

	Current	Prior	To-Date	
Total Billings	90,849.73	399,408.17	490,257.90	
Limit			945,000.00	
Remaining			454,742.10	
		Total this Invoice		\$90,849.73

Billings to Date

	Current	Prior	Total
Labor	64,806.25	310,497.50	375,303.75
Subcontractor	23,770.75	77,219.75	100,990.50
Expense	0.00	2,600.00	2,600.00
Add-on	2,272.73	9,090.92	11,363.65
Totals	90,849.73	399,408.17	490,257.90

Project 7345 Rhode Island EERMC - 2020 Invoice 7029

Billing Backup

Wednesday, July 15, 2020

Optimal Energy Inc.

Invoice 7029 Dated 6/30/2020

1:18:52 PM

Phase 001 Policy & Strategy

Optimal Staff

			Hours	Rate	Amount
Belliveau, Eric	6/1/2020		1.00	195.00	195.00
	PIM prep call, read PUC update				
Belliveau, Eric	6/2/2020		2.25	195.00	438.75
	pims meeting and prep, declining discount rate disc (partial billing)				
Belliveau, Eric	6/4/2020		.50	195.00	97.50
	discussions around industrail groups stopping EE SBC				
Belliveau, Eric	6/8/2020		1.00	195.00	195.00
	check in call, review information from MG on costs and potential money "grab"				
Belliveau, Eric	6/18/2020		1.00	195.00	195.00
	pims review and additions				
Belliveau, Eric	6/24/2020		.50	195.00	97.50
	information for RT on sunseting issues in NJ				
Belliveau, Eric	6/25/2020		2.50	195.00	487.50
	review materials from Grid, prep with MG, attend meeting on PIMS, debrief				
Belliveau, Eric	6/30/2020		2.00	195.00	390.00
	PIMS call and prep with MG				
Chant, Elizabeth	6/23/2020		.25	195.00	48.75
	review NJ Clean Energy law and generic NJ legal provisions for sunset provision				
Chant, Elizabeth	6/24/2020		.50	195.00	97.50
	materials to OER on NCSL legislative summaries; clip and send NJ CEA material on EVS				
Guerard, Michael	6/1/2020		2.75	195.00	536.25
	PIMs prep call w Becca, EB; Bi-weekly chk-in w MR-Grid and Becca; review LCP Stds changes				
Guerard, Michael	6/2/2020		3.25	195.00	633.75
	PIMs mtg w OER/Grid/Division, prep; Team discussion on Discount Rates for long-lived measures				
Guerard, Michael	6/4/2020		1.00	195.00	195.00
	AC data request response for OER; EERMC agenda review and chk in w BT				
Guerard, Michael	6/5/2020		4.25	195.00	828.75
	OER/C-Team/Div bi-weekly chk-in; source info on C.Poweel for OER; finalize and send EERMC memos on Finance and MPS tool to Becca; review LCP stds				
Guerard, Michael	6/8/2020		3.25	195.00	633.75
	Call w Becca to prep for EERMC 1-1's; send reminder to Joe G on 1-1-; LCP stds review; AESC updates				
Guerard, Michael	6/9/2020		1.75	195.00	341.25
	1-1 council mtg w J.Garlick, follow-up; prep for next 1-1s				
Guerard, Michael	6/11/2020		6.00	195.00	1,170.00
	1-1 mtg w B.White; 1-1 mtg w Karen; MPS follow-up call w OER/Grid; LCP stds review				

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Project	7345	Rhode Island EERMC - 2020			Invoice	7029
Guerard, Michael	6/12/2020	5.50	195.00		1,072.50	
	EE TWG mtg, prep and debriefs; EERMC materials development; prep for 1-1 mtgs					
Guerard, Michael	6/15/2020	4.75	195.00		926.25	
	1-1 call w K. Teichert, OER; Stakeholder call w Kai/GECA; EERMC mtg prep					
Guerard, Michael	6/16/2020	4.25	195.00		828.75	
	EERMC mtg prep; stakeholder call w Sydney/RIIB; Stakeholder call with Hank/Acadia; PIM jurisdictional comp work					
Guerard, Michael	6/17/2020	2.75	195.00		536.25	
	EERMC mtg prep of docs, presentations					
Guerard, Michael	6/18/2020	8.00	195.00		1,560.00	
	EERMC mtg, prep and ebrieffs; 1-1 w P.Case; PIMs mtg prep; coord w Marisa					
Guerard, Michael	6/19/2020	2.75	195.00		536.25	
	Finalize PUC submittal of LCP stds input w/ Marisa; EERMC mtg follow-up tasks; PIM conf. call w OER/Grid/Division, prep					
Guerard, Michael	6/23/2020	2.00	195.00		390.00	
	Review COVID update from Grid; source/send EE legislation info to Becca; call w C.Kearns on EE legislation					
Guerard, Michael	6/29/2020	1.25	195.00		243.75	
	Bi-weekly chk-in w OER/Grid; prep for PIM mtg; review annual calendar					
Guerard, Michael	6/30/2020	1.50	195.00		292.50	
	PIM call w OER/Grid/Division					
Jacobs, Adam	6/1/2020	.25	185.00		46.25	
	-RI HVAC/ventilation guidance for businesses					
Jacobs, Adam	6/2/2020	1.00	185.00		185.00	
	-RI C-team daily scrum -finalize and distribute C&I agenda call					
Jacobs, Adam	6/3/2020	1.00	185.00		185.00	
	-TEC-RI pushes to stop EE -review April 2020 C&I data report -notes on why EE SBC should not be suspended					
Jacobs, Adam	6/4/2020	2.00	185.00		370.00	
	-C&I sector team call -notes and follow-ups					
Jacobs, Adam	6/18/2020	.50	185.00		92.50	
	-1/2 FCM EE issue discussion					
Jacobs, Adam	6/24/2020	.25	185.00		46.25	
	-May C&I data report review					
Keating, Griffith	6/22/2020	2.00	130.00		260.00	
	Placeholder - 2 hours for adriand doing end use mapping					
Mosenthal, Philip	6/2/2020	1.25	195.00		243.75	
	rev. CCEI work plan, emails re same					
Mosenthal, Philip	6/11/2020	.50	195.00		97.50	
	PIMs rev/info					
Mosenthal, Philip	6/16/2020	.50	195.00		97.50	
	PIMS emails					
Ross, Samuel	6/29/2020	2.25	185.00		416.25	
	Gas rate and bill impacts model review; 3 yr planning disc					
Socks, Matthew	6/18/2020	1.25	185.00		231.25	

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Project	7345	Rhode Island EERMC - 2020		Invoice	7029
		Discuss AESC proposals/Study Group discussion w/ B.Trietch; submitting technical scoring			
Socks, Matthew		6/25/2020	.50	185.00	92.50
		Discussing AESC proposal approaches; identifying key considerations			
Socks, Matthew		6/29/2020	.75	185.00	138.75
		Providing update on AESC Study			
		Totals	80.50		15,470.00
		Total Labor			15,470.00
				Total this Phase	\$23,123.75

Phase 002 Cyclical Planning & Reporting

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian		6/1/2020	.75	130.00	97.50
		Financing Comps memo finalization			
Caesar, Adrian		6/10/2020	3.50	130.00	455.00
		Financing Program performance research - Commercial and Residential OBR, HEAT Loan data request			
Caesar, Adrian		6/12/2020	2.00	130.00	260.00
		NGrid 3YP First Draft - initial Electric/Gas data processing and comps			
Caesar, Adrian		6/15/2020	5.00	130.00	650.00
		RI 3YP Elec/Gas Comparisons - 2019 Actuals, 2020 Plan, NGrid MA 2021 3YP data			
Caesar, Adrian		6/16/2020	3.50	130.00	455.00
		NGrid RI and MA Data Comps, PIMs Data analysis and comps			
Caesar, Adrian		6/17/2020	3.75	130.00	487.50
		PIMs Data analysis and comps - MA, RI, CT			
Caesar, Adrian		6/18/2020	3.50	130.00	455.00
		PIMs Data analysis and comps - MA, RI, CT; RI 2019 Actuals to 2020/3YP Savings			
Caesar, Adrian		6/19/2020	4.50	130.00	585.00
		2019 C&I Elec Savings by End Use Analysis, Cross jurisdictional PIMs analysis and comps			
Caesar, Adrian		6/22/2020	4.00	130.00	520.00
		2019 C&I and Res Elec Savings by End Use Analysis			
Caesar, Adrian		6/23/2020	1.75	130.00	227.50
		2019 C&I and Res Elec Savings comps to MPS/3YP			
Caesar, Adrian		6/24/2020	1.50	130.00	195.00
		RI May C&I Electric Monthly data processing and report			
Guerard, Michael		6/2/2020	1.75	195.00	341.25
		Prep for Sector Strategy meetings and RIIB Financing meetings			
Guerard, Michael		6/3/2020	3.25	195.00	633.75
		SRP TWG PPT dev w Sam; prep for sector strategy mtgs			
Guerard, Michael		6/4/2020	5.75	195.00	1,121.25
		Rez monthly sector call; C&I monthly sector call -- prep and debriefs; Call w RIIB/OER on financing			

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020			Invoice	7029
Guerard, Michael		6/8/2020	1.50	195.00		292.50
		Planning for next steps of 3YP				
Guerard, Michael		6/9/2020	3.75	195.00		731.25
		Workforce deep dive call w Grid, prep and debriefs; map out next phase of 3YP for team				
Guerard, Michael		6/12/2020	2.50	195.00		487.50
		3YP 1st draft review, set up team assignments; review BC/MPS tool				
Guerard, Michael		6/15/2020	2.75	195.00		536.25
		Review 1st draft 3YP, uipdates on process with team				
Guerard, Michael		6/16/2020	.75	195.00		146.25
		BC/MPS tool review w team				
Guerard, Michael		6/17/2020	3.25	195.00		633.75
		3YP process and mtgs and team coord on tasks; call w Grid/OER/Division on planning mtgs				
Guerard, Michael		6/19/2020	1.25	195.00		243.75
		Prep for rez and C&I deep dive mtgs, coord w team				
Guerard, Michael		6/22/2020	2.25	195.00		438.75
		3YP review work, research				
Guerard, Michael		6/23/2020	1.25	195.00		243.75
		3YP research, team coord.				
Guerard, Michael		6/24/2020	1.50	195.00		292.50
		3YP tasks, team coord				
Guerard, Michael		6/29/2020	3.25	195.00		633.75
		C&I deep dive GoTo mtg, prep and debriefs; prep for rez deep dive				
Guerard, Michael		6/30/2020	3.00	195.00		585.00
		Rez deep dive call, prep w CJ; C&I deep dive meeting prep				
Jacobs, Adam		6/2/2020	.25	185.00		46.25
		-BC to MPS program mapping program-level comparison				
Jacobs, Adam		6/8/2020	1.25	185.00		231.25
		-Architecture 2030 District research -planning for 3YP review call				
Jacobs, Adam		6/9/2020	1.25	185.00		231.25
		-workforce planning call -3YR Plan Review Plan Call Follow-Up				
Jacobs, Adam		6/10/2020	1.00	185.00		185.00
		-review workforce follow-ups and share details on RCC program w/ all stakeholders -RI daily scrum				
Jacobs, Adam		6/11/2020	1.00	185.00		185.00
		-3YR Plan - Workforce Development follow-ups				
Jacobs, Adam		6/12/2020	1.75	185.00		323.75
		-Ozone Laundry NGrid assertion -3YP data processing call -initial review of first draft plan, BC model and presentation				
Jacobs, Adam		6/15/2020	.75	185.00		138.75
		-RI daily scrum -initial BC to MPS electric/gas mapping tool results review for C&I				
Jacobs, Adam		6/16/2020	.75	185.00		138.75
		-BC/MPS mapping and check-in on C&I measures				

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Project	7345	Rhode Island EERMC - 2020			Invoice	7029
Jacobs, Adam		6/17/2020	2.75	185.00		508.75
		-MPS/BC model mapping review -2019 actual performance compared to MPS/BC model mapping -RI Dail scrum -BCR Model MPS Comparison Discussion				
Jacobs, Adam		6/18/2020	1.25	185.00		231.25
		-follow-ups to BC/MPS call w/ Grid -schedule workforce check-in/prep call w/ Kevin Rose				
Jacobs, Adam		6/19/2020	2.50	185.00		462.50
		-internal follow-ups on 3YP -scheduling C&I 3YP meetings -assemble documents in ShareFile and task assignments for subject matter experts				
Jacobs, Adam		6/22/2020	1.25	185.00		231.25
		-review 2019 result end-use analysis for BC/MPS mapping -RI daily scrum				
Jacobs, Adam		6/23/2020	3.50	185.00		647.50
		-integrate 2019 actuals into BC/MPS mapping for electric and gas -workforce development prep call, notes and follow-ups -RI C&I COVID Update review -RI Commercial and Industrial 3YP Review Meeting Next Steps (meeting invite reminder) -BC Model/MPS/3YP Analysis Discussion -follow-up w/ Jen Kallay RE: availability				
Jacobs, Adam		6/24/2020	2.50	185.00		462.50
		-C&I sector team prep -C&I sector planning call meeting invitation -C&I sector savings gap analysis				
Jacobs, Adam		6/25/2020	.50	185.00		92.50
		-workforce next steps, MBE/WBE reporting requirements				
Jacobs, Adam		6/26/2020	.50	185.00		92.50
		-RI C&I sector planning prep				
Jacobs, Adam		6/29/2020	5.50	185.00		1,017.50
		-RI daily scrum planning discussion -consolidation for C&I program design enhancement recommendations -draft slide PPT for review on C&I 1st draft plan call -RI C&I Team 3YP Review Session: Part 1 (prep, meeting and internal follow-ups)				
Jacobs, Adam		6/30/2020	1.50	185.00		277.50
		-C&I plan meeting notes/follow-ups -C&I program enhancement matrix additions				
Johnson, Craig		6/1/2020	2.75	150.00		412.50
		Sector Teams - Review residential and C&I monthly data. Assemble monthly data reports.				
Johnson, Craig		6/2/2020	3.50	150.00		525.00
		Sector Teams - Review Res and C&I monthly data and assemble monthly data reports. Discussion w/ Mike about agenda and strategy for upcoming Res sector team meeting. 3YP - Schedule RI Workforce Development meeting.				
Johnson, Craig		6/3/2020	5.25	150.00		787.50

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Project	7345	Rhode Island EERMC - 2020			Invoice	7029
		Sector Teams - Review res & C&I montly data, complete assembly and distribute monthly data reports. Develop and distribute Res meeting agenda to sector teams. 3YR Plan - Review and respond to NGrid comments on BC/MPS measure mapping.				
Johnson, Craig		6/4/2020	5.00	150.00		750.00
		3YR Plan - Reschedule workforce development meeting. Review and respond to NGrid comments on BC/MPS measure mapping. Sector Teams - Residential Sector Team meeting and meeting debrief. OER Request - Review 2019 residential data to pull breakouts of AC data.				
Johnson, Craig		6/5/2020	.25	150.00		37.50
		Finish review and distribute additional feedback to NGrid on BC/MPS measure mapping.				
Johnson, Craig		6/8/2020	4.00	150.00		600.00
		3YP - Review BC/MPS measure mapping in prep for review check-in w/ Grid. Plan review prep meeting with internal C-Team. Update meeting agenda for workforce development meeting. Set up meeting logistics for Councilor 1-on-1's.				
Johnson, Craig		6/9/2020	4.75	150.00		712.50
		Prep for 3YR Plan Review. BC MPS Mapping Clarifying questions, finalize mappings. Workforce Development Call, call prep				
Johnson, Craig		6/11/2020	3.25	150.00		487.50
		3YR Planning - Update BC/MPS mapping based on feedback from Grid				
Johnson, Craig		6/12/2020	4.75	150.00		712.50
		First Draft 3YP Review w/ Mike. Identify analysis needs and next steps for sector teams on review. Review/Update BC/MPS mappings. TWG Meeting Check-in w/ internal team about next steps for 3YR Plan review. Review 3YR Plan Set up sharefile for sharing BC/MPS mapping tool w/ Ngrid and OER				
Johnson, Craig		6/15/2020	4.50	150.00		675.00
		Meeting w/ Mike, Sam, and Adrian to discuss EERMC presentation needs. 3yr plan review				
Johnson, Craig		6/16/2020	7.25	150.00		1,087.50
		Work on presentation and outline for C-Team's presentation on 3YR Plan first draft. Review draft presentation outline, delegate tasks. 3yr plan review.				
Johnson, Craig		6/17/2020	5.75	150.00		862.50
		Work on Council presentation and 3YR plan review. Sector teams - send out data to res team for review, schedule review prep call. Prep for Council presentation. BCR/MPS Comparison Discussion, debrief w/ Mike and Sam, outline next steps for this.				
Johnson, Craig		6/18/2020	7.00	150.00		1,050.00
		Council meeting and meeting prep. Work on scheduling email/assignments for 3yp review next week, emails. Next steps on 3YP review strategy w/ res sector team. Discuss next steps for Data Analysis on 3yr plan.				
Johnson, Craig		6/19/2020	6.75	150.00		1,012.50
		Upload recording of Council meeting to ShareFile, notify Becca and Nathan. Develop matrix of alternative program design/enhancements for Res team for 3YP review. Coordinate next set of Resi meetings. Review resi end-use measure subcat comparisons				
Johnson, Craig		6/22/2020	3.00	150.00		450.00
		Coordinate res sector plan review meetings. Update to alternative program design/enhancements matrix for Res 3yp review. 3YP Review.				

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Project	7345	Rhode Island EERMC - 2020			Invoice	7029
Johnson, Craig		6/23/2020	8.75	150.00		1,312.50
		Res 3YP Review - Deep dive end-use targets gap. Check-in call w/ Residential team. Coordinate meetings for Resi team.				
Johnson, Craig		6/24/2020	2.75	150.00		412.50
		Res 3YP Review - Deep dive and end use targets gap. Review Adrian's end-use mapping for mapping 2019 actual to BC/MPS mapping tool. Set up next week's sector team meetings; coordinate with Adam and Mike on timing and messaging.				
Johnson, Craig		6/25/2020	4.50	150.00		675.00
		Review C&I monthly data. Update 2019 resi data end-use mappings to prep 2019 actuals for incorporation into the BC/MPS mapping tool. Matrix and deep dive on end use targets gap. Follow-up w/ Angela on Resi VHEA data.				
Johnson, Craig		6/29/2020	7.50	150.00		1,125.00
		3YP Review - prep data (end-use/measure category targets to plan comps) for Resi calls this week. Consolidate/clean up res team matrix. Discussion w/ Mike about same.				
Johnson, Craig		6/30/2020	1.50	150.00		225.00
		Resi 3YP Review and next steps meeting; meeting prep.				
Ross, Samuel		6/1/2020	1.50	185.00		277.50
		MPS BCR Next steps; DDR research				
Ross, Samuel		6/2/2020	3.00	185.00		555.00
		continued exploration of declining discount rates; internal mtg re: early analyses				
Ross, Samuel		6/3/2020	4.50	185.00		832.50
		SRP Slide Deck; review of LCP re: same; scheduling and follow ups re: MPS mapping tool next steps and mapping clarifications; correspondence re: TEC-RI proposal to suspend EE				
Ross, Samuel		6/4/2020	3.50	185.00		647.50
		RIIB Meeting; portions of Res and C&I sector team calls; AC program data				
Ross, Samuel		6/5/2020	3.00	185.00		555.00
		C-Team Check In call; continued finance research, scheduling re: HEAT Loan data; MPS deliverable follow up				
Ross, Samuel		6/8/2020	2.50	185.00		462.50
		MPS BC Mapping Tool follow dev.; coord. re: 3YP work in coming weeks; follow up re: next steps on deliverables;				
Ross, Samuel		6/9/2020	2.75	185.00		508.75
		BCR MPS meeting with NGrid, follow up & prep re: same; further work on add't features				
Ross, Samuel		6/10/2020	1.75	185.00		323.75
		HEAT Loan discussion with Angela; prep and next steps; scheduling re: MPS BCR Comp tool				
Ross, Samuel		6/11/2020	1.75	185.00		323.75
		financing research check-in; disc. re: COVID and Gas DR next steps; call with Becca re: MPS next steps				
Ross, Samuel		6/12/2020	3.00	185.00		555.00
		quick call re: 3YP draft; BCR MPS model data entry, formatting clean-up; distribution of model for structural review; check in re: posting materials to council mtg; check in w/Mike re next wk				
Ross, Samuel		6/15/2020	3.75	185.00		693.75
		DR results research and discussions; 3YP BCR Model data review; planning meeting				
Ross, Samuel		6/16/2020	6.50	185.00		1,202.50

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Project	7345	Rhode Island EERMC - 2020		Invoice	7029
		3yp planning discussion; bc model mps mapping tool development; MPS dr adjusted results memo; follow up on RI MPS outstanding items			
Ross, Samuel		6/17/2020	9.25	185.00	1,711.25
Ross, Samuel		6/18/2020	8.75	185.00	1,618.75
Ross, Samuel		6/19/2020	4.25	185.00	786.25
Ross, Samuel		6/22/2020	1.50	185.00	277.50
Ross, Samuel		6/23/2020	2.00	185.00	370.00
Ross, Samuel		6/24/2020	2.50	185.00	462.50
Ross, Samuel		6/25/2020	1.25	185.00	231.25
Ross, Samuel		6/26/2020	1.50	185.00	277.50
		Totals	262.50		43,837.50
		Total Labor			43,837.50
				Total this Phase	\$57,549.50

Phase	003	EERMC Oversight - EMV			
Optimal Staff			Hours	Rate	Amount
Guerard, Michael		6/3/2020	2.50	195.00	487.50
Guerard, Michael		6/11/2020	2.00	195.00	390.00
Guerard, Michael		6/17/2020	2.00	195.00	390.00
Guerard, Michael		6/22/2020	1.25	195.00	243.75
Jacobs, Adam		6/3/2020	1.00	185.00	185.00
Jacobs, Adam		6/15/2020	.25	185.00	46.25
Jacobs, Adam		6/19/2020	1.00	185.00	185.00

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Project	7345	Rhode Island EERMC - 2020			Invoice	7029
Jacobs, Adam		6/22/2020	1.00	185.00		185.00
		-RI C&I Upstream Lighting Impact eval call + review/prep				
Jacobs, Adam		6/23/2020	.25	185.00		46.25
		-RI EM&V framework question/response w/ Ralph				
Johnson, Craig		6/1/2020	2.00	150.00		300.00
		Review and distribute final version of NGrid 2017 Custom Gas Report to internal team. Review final version of one-page summaries for 2016 Electric and Gas Custom Evaluations, 2016 Small Biz Evaluation, and 2016 Upstream Lighting Evaluation. Review final copy of residential retrofit survey instruments.				
Johnson, Craig		6/3/2020	2.00	150.00		300.00
		C&I EM&V Monthly Check-in. Review studies and prep for meeting.				
Johnson, Craig		6/4/2020	.50	150.00		75.00
		Review Phil's comments on NMR revised CCEI work plan, emails about the same.				
Johnson, Craig		6/5/2020	2.25	150.00		337.50
		Review, compile, and distribute comments for lighting sales data analysis SOW. Review 1-page summary of piggybacking study. Review notes and follow-up on action items from C&I EM&V call. Coordination call w/ Ralph and Romilee to discuss updates to MA studies in EM&V tracker.				
Johnson, Craig		6/9/2020	1.00	150.00		150.00
		Review updated lighting sales analysis SOW, emails.				
Johnson, Craig		6/12/2020	.75	150.00		112.50
		Review/test Res Retrofit survey and provide feedback.				
Johnson, Craig		6/15/2020	.50	150.00		75.00
		monitor EM&V activity				
Johnson, Craig		6/18/2020	.25	150.00		37.50
		Review C&I Survey Options				
Johnson, Craig		6/19/2020	1.00	150.00		150.00
		RI C&I Survey Discussion for Heat Pump Market Assessment				
Johnson, Craig		6/22/2020	1.00	150.00		150.00
		C&I Upstream Lighting Impact Eval call				
Johnson, Craig		6/23/2020	.75	150.00		112.50
		Prep for Res EM&V meeting. Review and distribute comments for sense study non-participant survey. Coordinate scheduling for upcoming review of draft results on res retrofit study. Send out reminder about comments for behavior study.				
Johnson, Craig		6/24/2020	.50	150.00		75.00
		Work on rescheduling res EM&V meeting, emails about the same.				
Johnson, Craig		6/25/2020	1.75	150.00		262.50
		Respond to availability for EM&V codes meeting. Review Illume Behavior Study, compile C-Team comments, prep and send comments out.				
Johnson, Craig		6/29/2020	1.50	150.00		225.00
		Review and Coordinate C-Team review on Res Lighting Market Assessment and C&I Free Ridership and Spillover Studies.				
Johnson, Craig		6/30/2020	1.75	150.00		262.50
		Monitor EM&V activities - review tracker; review 1 page summary for Market Characterization Data Collection Study; Work on and send out meeting agenda and materials for C&I/Res EM&V meeting; Catch up w/ Carrie.				
Mosenthal, Philip		6/25/2020	.25	195.00		48.75

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Project	7345	Rhode Island EERMC - 2020	Invoice	7029
	emails re codes and standards mtgs.			
	Totals	29.00	4,832.50	
	Total Labor			4,832.50
			Total this Phase	\$7,237.50

Phase 004 EERMC Oversight - Education/Stakeholders

Optimal Staff

		Hours	Rate	Amount	
Caesar, Adrian	6/1/2020	.75	130.00	97.50	
	EERMC Website update - 2020 EERMC Report upload and formatting				
Caesar, Adrian	6/10/2020	.25	130.00	32.50	
	EERMC Website updates - June Mtg. page				
Caesar, Adrian	6/12/2020	.25	130.00	32.50	
	EERMC June Mtg updates, Potential study document update				
Caesar, Adrian	6/17/2020	.25	130.00	32.50	
	EERMC meeting material upload				
Caesar, Adrian	6/18/2020	.50	130.00	65.00	
	EERMC June mtg updates and potential study document upload				
Caesar, Adrian	6/22/2020	.25	130.00	32.50	
	Consultant Services RFP upload and posting				
Caesar, Adrian	6/24/2020	.25	130.00	32.50	
	Potential Study revised Slide Deck upload				
Guerard, Michael	6/16/2020	1.75	195.00	341.25	
	Stakeholder mtgs w Acadia, RIIB - prep and follow-up tasks				
	Totals	4.25		666.25	
	Total Labor				666.25
			Total this Phase		\$666.25
			Total this Project		\$88,577.00
			Total this Report		\$88,577.00

George Lawrence, Caerbannog Consulting
3540 Mountain Rd
Addison VT 05491

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 21
Invoice Date: June 30, 2020
OEI Project #: 7345

Work Performed for Rhode Island EERMC

Description of Services		Amount	
Services Performed 06/01/20 through 06/30/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	16.50	\$185.00	\$3,052.50
LABOR - Travel Hours	0.00	\$92.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$3,052.50</u>

George Lawrence, Caerbannog Consulting
Services Performed 06/01/20 through 06/30/20

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
6/4/20	Call with National Grid			1.75			1.75	0.00	1.75
6/8/2020	Review memo of financing options in RI			0.25			0.25	0.00	0.25
6/17/2020	Lighting brainstorm session with Grid, follow up			1.00			1.00	0.00	1.00
6/19/2020	Download documents and spreadsheets, planning, begin review of Three Year plan materials		2.50				2.50	0.00	2.50
6/22/2020	3 hr review three year plan text and analysis		3.00				3.00	0.00	3.00
6/23/2020	BCR and potential study analysis			2.50			2.50	0.00	2.50
6/24/2020	.5 hr call with Optimal to discuss 3 Yr Plan		0.50				0.50	0.00	0.50
6/26/2020	Lighting call with National Grid			0.50			0.50	0.00	0.50
6/29/2020	1.5 hrs 3 Yr Plan call with National Grid, 1.5 hr analysis of potential study and Planning model, 1 hr provide comments/suggestions, .5 hr research		4.50				4.50	0.00	4.50
							0.00	0.00	0.00
	Total hours	0.00	10.50	6.00	0.00	0.00	16.50	0.00	16.50
	Total Amount	\$0.00	\$1,025.00	\$1,110.00	\$0.00	\$0.00	\$3,052.50	0.00	\$3,052.50

Margie Lynch/Core Energy Insights, Inc.
111 Hooksett Road, Auburn, NH 03032

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 6-2020*
Invoice Date: *June 30, 2020*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services	Amount
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Services Performed 06/01/2020 through 06/30/2020

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	9.50	\$176.00	\$1,672.00

TOTAL DUE **\$1,672.00**

Margie Lync Core Energy Insights, Inc.
Services Performed 06/01/2020 through 06/30/2020

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
6/4/20	Prepared for and participated in monthly res sector meeting		1.50				1.50	0.00	1.50
6/18/2020	Reviewed draft 2022-2024 plan; participated in planning call		2.25				2.25	0.00	2.25
6/23/2020	Strategized equity issues w/M. Guerard; participated in res planning call		2.00				2.00	0.00	2.00
6/25/2020	Prepared for and participated in res team planning call		1.50				1.50	0.00	1.50
6/29/2020	Prepared for planning call with National Grid		1.00				1.00	0.00	1.00
6/30/2020	Prepared for and participated in res planning meeting		1.25				1.25	0.00	1.25
							0.00	0.00	0.00
	Total hours	0.00	11.50	0.00	0.00	0.00	11.50	0.00	11.50
	Total Amount	\$0.00	\$1,672.00	\$0.00	\$0.00	\$0.00	\$1,672.00	0.00	\$1,672.00

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Invoice

TO: Optimal Energy Inc.
April Clodgo
10600 Route 116, Suite 3
Hinesburg, VT 05461
clodgo@optenergy.com

Invoice #:4105
Invoice Date: 7/7/2020
Invoice Period: 6/1/2020-6/30/2020
Job Name: RI EERMC
Terms: Net 30 Days
PO # 3200362251

Consultant Labor	Job-Phase-Project	Project Description	Rate	Hours	Amount
Dan Mellinger	4104-00-02	Cyclical Planning & Reporting Activities	\$185.00	14.00	\$2,590.00
Glenn Reed	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	15.50	\$3,022.50
Richard Faesy	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	13.25	\$2,583.75
EFG Labor Subtotal:				42.75	\$8,196.25

TOTAL DUE THIS INVOICE: \$8,196.25 USD

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4105
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 6/1/2020-6/30/2020
Consultant: Dan Mellinger

Date	Phase-Project	Project Description	Hours Task Description
6/1/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Send NLC training info to Ben
6/4/2020	00-02	Cyclical Planning & Reporting Activities	2.25 C&I sector meeting; discuss NLC with Ben Rivers
6/9/2020	00-02	Cyclical Planning & Reporting Activities	1.25 lighting data analysis
6/10/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Read Mike's message re: 3YR Plan; reach out to Ben and Travis re: brainstorming call
6/16/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Prep for lighting call
6/17/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Prep for lighting brainstorm meeting; leading lighting meeting, send notes and action items
6/22/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Review RI 3-yr plan materials and emails from Adam; follow-up questions from last week's lighting meeting; Performance Lighting Data analysis
6/24/2020	00-02	Cyclical Planning & Reporting Activities	1.50 C&I sector prep call; review materials from Adam
6/25/2020	00-02	Cyclical Planning & Reporting Activities	0.50 RI data analysis
6/26/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Lighting data dashboard; prep agenda for meeting; lead C&I lighting meeting
6/29/2020	00-02	Cyclical Planning & Reporting Activities	2.50 Prep for 3-year planning call; participate in call
TOTAL:			14.00

Energy Futures Group, Inc.

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Fax: (802) 329-2143



Task Description

Invoice #:4105
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 6/1/2020-6/30/2020
Consultant: Glenn Reed

Date	Phase-Project	Project Description	Hours Task Description
6/4/2020	00-02	Cyclical Planning & Reporting Activities	1.25 RI Res. Check-in call
6/4/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Follow up on Plan Process and outline
6/9/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review revised NMR lighting sales data analysis SOW
6/10/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Call w/R. Faesy and Grid RI: All electric RNC and Zero Energy Challenge
6/17/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Review and comment on MPS workbook
6/17/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Review C-Team BCR/MPS presentation
6/18/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Internal call to discuss Targets and Dunsky MPS/Three-Year Plan Review, prep
6/19/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Follow up on Targets and MPS
6/22/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Review Res. Evaluations to develop possible questions for missed monthly RI evaluation check-in call
6/22/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Review RI BCR and MPS data, Residential enhancement matrix
6/23/2020	00-02	Cyclical Planning & Reporting Activities	1.25 CT check-in call, Res. Enhancement matrix
6/24/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Call w/R. Faesy re: RI Res. Program matrix
6/24/2020	00-02	Cyclical Planning & Reporting Activities	0.25 RI Target and MPS data: getting participant numbers
6/25/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Comments on draft Behavioral report
6/25/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Attend virtual audit webinar (time split with other clients and internal development)
6/25/2020	00-02	Cyclical Planning & Reporting Activities	1.75 Review updated BCR and MPS data, revise Res. Program matrix, internal CT call
6/25/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Comments on draft Behavioral report

6/29/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Complete edits/additions to RI Res. Program enhancement workbook
6/30/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Call w/Grid to discuss Residential Enhancements

TOTAL:			15.50
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Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4105
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 6/1/2020-6/30/2020
Consultant: Richard Faesy

Date	Phase-Project	Project Description	Hours Task Description
6/2/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Schedule and prep for Grid meetings on 6/4
6/4/2020	00-02	Cyclical Planning & Reporting Activities	2.00 Grid Planning review meeting, follow up review Dunskey Potential Study and OEI questions
6/10/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Check in with Glenn re. Laura Rodormer's RNC questions
6/12/2020	00-02	Cyclical Planning & Reporting Activities	0.50 RNC questions from Laura Rodormer, scheduling with Nick Jones
6/15/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Laura Rodormer RNC info request meeting with Nick Jones from CT. Plan scheduling and emails.
6/18/2020	00-02	Cyclical Planning & Reporting Activities	2.00 RI electrification webinar, 3 Year Plan consulting internal call
6/22/2020	00-02	Cyclical Planning & Reporting Activities	0.25 3 year plan emails
6/23/2020	00-02	Cyclical Planning & Reporting Activities	1.00 3 year plan meeting with OEI
6/24/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Check in with Optimal, follow up with Craig
6/25/2020	00-02	Cyclical Planning & Reporting Activities	1.00 RI check in
6/28/2020	00-02	Cyclical Planning & Reporting Activities	2.00 2021 Plan matrix complete
6/30/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Grid meeting to review plan matrix
TOTAL:			13.25

JLC Consulting, LLC
52 Bent Creek Road
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-2020.03*
Invoice Date: *June 30, 2020*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 06/01/20 through 06/30/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	9.75	\$195.00	\$1,901.25
LABOR - Travel Hours	0.00	\$97.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$1,901.25</u>

LC Consulting, LLC

Services Performed 06/01/20 through 06/30/20

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
6/1/20	Review materials for monthly N Grid check in call		0.75				0.75	0.00	0.75
6/4/2020	Planning meeting prep, mtg and follow up		3.00				3.00	0.00	3.00
6/22/2020	Plan review		0.75				0.75	0.00	0.75
6/23/2020	Download documents and prelim rvw, emails		1.00				1.00	0.00	1.00
6/24/2020	Planning prep call, document review, work plan		1.00				1.00	0.00	1.00
6/25/2020	HVAC program strategies research and summary		2.75				2.75	0.00	2.75
6/30/2020	Updates regarding planning process and content		0.50				0.50	0.00	0.50
							0.00	0.00	0.00
	Total hours	0.00	11.75	0.00	0.00	0.00	11.75	0.00	11.75
	Total Amount	\$0.00	\$1,011.25	\$0.00	\$0.00	\$0.00	\$1,011.25	0.00	\$1,011.25

Ralph Prah
7613 Whitebridge Glen, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 15
Invoice Date: June 30, 2020
OEI Project #: 7345

Work Performed for National Grid USA Service Company, Under Purchase Order No.
3200362251

Description of Services	Amount		
Services Performed 5/01/20 through 6/30/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	39.25	\$195.00	\$7,653.75
LABOR - Travel Hours	0.00	\$97.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$7,653.75</u>

Ralph Praeger
Services performed 05/01/20 to 06/30/20

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stateholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
5/1/2020	C&I upstrm ltg impact eval	0.25					0.25	0.00	0.25
5/2/2020	HP study; C&I upstrm ltg study; custom gas report; res ltg sales data study; res retrofit study (rev workplan, memo, instr); res ltg piece from Glenn	0.75					0.75	0.00	0.75
5/3/2020	C&I upstrm ltg; C&I custom gas impact report; HP typology analysis; codes and standards promulgation impact accounting white paper	1.50					1.50	0.00	1.50
5/4/2020	codes promulgation white paper; res ltg sales data study; C&I upstrm ltg SOW; conf call w/NGRID and DNV GL on Covid-19 mitigation	2.25					2.25	0.00	2.25
5/5/2020	C&I upstrm ltg SOW; HP study (scenarios)	0.75					0.75	0.00	0.75
5/6/2020	C&I studies call; cal w/Mark and Mike	1.00					1.00	0.00	1.00
5/7/2020	codes call, follow-up	1.50					1.50	0.00	1.50
5/8/2020	C&I upstrm impact eval;	0.25					0.25	0.00	0.25
5/11/2020	CSSI study; res retro studies; C&I gas 2017 report; res ltg sh	1.50					1.50	0.00	1.50
5/12/2020	res retro studies analysis plan; code compliance study	0.75					0.75	0.00	0.75
5/14/2020	hp study – conf call	1.25					1.25	0.00	1.25
5/15/2020	res retro studies analysis plan and intvw guides; C&I NTG study; workforce report rev	1.75					1.75	0.00	1.75
5/17/2020	res retro studies; HP study; shelf stocking report;	0.25					0.25	0.00	0.25
5/18/2020	compliance study – conf call + prep	1.25					1.25	0.00	1.25
5/20/2020	C&I NTG study; res ltg shelf-stocking report; res retro study instrs	2.50					2.50	0.00	2.50
5/21/2020	study tracker; res retro studies	0.25					0.25	0.00	0.25
5/22/2020	HP study (contr intvws); res retro study instrs	1.50					1.50	0.00	1.50
5/25/2020	res ltg market share report; C&I NTG study; res retro studies; codes and standards studies	1.25					1.25	0.00	1.25
5/26/2020	C&I NTG study	0.50					0.50	0.00	0.50
5/27/2020	C&I NTG study; res studies call; custom gas impact report rev	2.00					2.00	0.00	2.00
5/28/2020	res ltg shelf stocking report; CCEI query from Phil;	0.50					0.50	0.00	0.50
5/29/2020	C&I studies general; res ltg sales data analysis; CEEI conf call + prep; 2017 C&I custom gas impact report;	2.75					2.75	0.00	2.75
5/30/2020	res ltg sales data report; res retro studies; codes promulgation framework	0.50					0.50	0.00	0.50
6/1/2020	codes study (workplan)	0.50					0.50	0.00	0.50
6/2/2020	update study tracker, e-mail mgmt	0.25					0.25	0.00	0.25
6/3/2020	C&I studies check-in call	1.00					1.00	0.00	1.00
6/5/2020	updating of study tracker (conf call + prep)	1.25					1.25	0.00	1.25
6/6/2020	piggybacking one-pager;	0.25					0.25	0.00	0.25
6/8/2020	res ltg sales data study	0.25					0.25	0.00	0.25
6/9/2020	ltg sales data	0.25					0.25	0.00	0.25
6/10/2020	ltg sales data study	0.25					0.25	0.00	0.25
6/12/2020	res ltg shelf stocking report; codes policy issues	0.50					0.50	0.00	0.50
6/15/2020	codes policy issues	0.25					0.25	0.00	0.25
6/16/2020	heat pump study; C&I upstrm ltg impact eval	0.50					0.50	0.00	0.50
6/17/2020	hp study	0.25					0.25	0.00	0.25
6/18/2020	HP study	0.25					0.25	0.00	0.25
6/19/2020	hp call	1.00					1.00	0.00	1.00
6/20/2020	HERS report	0.75					0.75	0.00	0.75
6/22/2020	C&I upstrm ltg study - conf call + prep	1.25					1.25	0.00	1.25
6/23/2020	C&I upstream ltg impact eval; query from Adam on EM&V application; HP study	1.00					1.00	0.00	1.00
6/24/2020	res studies; codes issues; behavior impact report;	0.75					0.75	0.00	0.75
6/25/2020	HER impact report; new version of study tracker; e-mail mgmt	0.50					0.50	0.00	0.50
6/27/2020	beh report	0.25					0.25	0.00	0.25
6/29/2020	C&I NTG sampling plan	0.50					0.50	0.00	0.50
6/30/2020	C&I NTG study; mtg prep; shelf stocking report;	0.75					0.75	0.00	0.75
	Total hours	33.25	0.00	0.00	0.00	0.00	33.25	0.00	33.25
	Total Amount	\$7,653.75	\$0.00	\$0.00	\$0.00	\$0.00	\$7,653.75	0.00	\$7,653.75

Rachel Sholly
48 Hudson Street
Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 30
Invoice Date: June 30, 2020
OEI Project #: 7345

Work Performed for National Grid USA Service Company

Description of Services		Amount
Services Performed 06/01/20 through 06/30/20		
	<u>Hours</u>	<u>Hourly Rate</u>
LABOR - Regular Hours	8.75	\$148.00
LABOR - Travel Hours	0.00	\$74.00
Travel Expenses		\$0.00
TOTAL DUE		<u>\$1,215.00</u>

Rachel Solly

Services Performed 06/01/20 through 06/30/20

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
6/1/2020	Updated handbook with current content			3.00			3.00	0.00	3.00
6/2/2020	Member 1-1 scheduling			0.25			0.25	0.00	0.25
6/3/2020	Member 1-1 scheduling			0.50			0.50	0.00	0.50
6/8/2020	Member 1-1 scheduling; Annual report printing communications; 1-1 mtg prep			0.75			0.75	0.00	0.75
6/17/2020	Finalized annual report & sent to printer; Member 1-1 scheduling & opening mtgs			2.00			2.00	0.00	2.00
6/25/2020	Communications re: education group; Finalized edu call notes			1.00			1.00	0.00	1.00
6/29/2020	Rescheduled edu call & related communications			0.50			0.50	0.00	0.50
6/30/2020	Communications re: annual report, printing & tax exempt status			0.75			0.75	0.00	0.75
	Total hours	0.00	0.00	17.5	0.00	0.00	17.5	0.00	17.5
	Total Amount	\$0.00	\$0.00	\$1,215.00	\$0.00	\$0.00	\$1,215.00	0.00	\$1,215.00

Invoice



July 31, 2020
Project No: 7345
Invoice No: 7045

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2020
PO #:

Professional Services from July 1, 2020 to July 31, 2020

Phase 001 Policy & Strategy

Optimal Staff

	Hours	Rate	Amount
Belliveau, Eric	11.25	195.00	2,193.75
Calcagni, Gretchen	1.75	185.00	323.75
Guerard, Michael	41.00	195.00	7,995.00
Jacobs, Adam	2.75	185.00	508.75
Mosenthal, Philip	1.25	195.00	243.75
Ross, Samuel	4.25	185.00	786.25
Socks, Matthew	3.50	185.00	647.50
Totals	65.75		12,698.75
Total Labor			12,698.75
Total this Phase			\$12,698.75

Phase 002 Cyclical Planning & Reporting

Optimal Staff

	Hours	Rate	Amount
Caesar, Adrian	35.50	130.00	4,615.00
Chant, Elizabeth	1.00	195.00	195.00
Guerard, Michael	34.50	195.00	6,727.50
Jacobs, Adam	17.00	185.00	3,145.00
Johnson, Craig	27.75	150.00	4,162.50

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020			Invoice	7045
	Ross, Samuel	31.50	185.00	5,827.50		
	Schuur, Arah	2.00	195.00	390.00		
	Totals	149.25		25,062.50		
	Total Labor					25,062.50

Subcontractors

Core Energy Insights Inc.	616.00	
Caerbannog Consulting, LLC	462.50	
Jennifer Chiodo	3,266.25	
Energy Futures Group, Inc.	7,352.50	
Total Subcontractors	11,697.25	11,697.25
	Total this Phase	\$36,759.75

Phase 003 EERMC Oversight - EMV
Optimal Staff

	Hours	Rate	Amount	
Guerard, Michael	6.75	195.00	1,316.25	
Jacobs, Adam	7.75	185.00	1,433.75	
Johnson, Craig	30.75	150.00	4,612.50	
Mosenthal, Philip	11.75	195.00	2,291.25	
Totals	57.00		9,653.75	
Total Labor				9,653.75

Subcontractors

Rachel Sholly	1,480.00	
Caerbannog Consulting, LLC	555.00	
Total Subcontractors	2,035.00	2,035.00
	Total this Phase	\$11,688.75

Phase 004 EERMC Oversight - Education/Stakeholders
Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	1.75	130.00	227.50	
Guerard, Michael	4.00	195.00	780.00	
Totals	5.75		1,007.50	
Total Labor				1,007.50
	Total this Phase			\$1,007.50

Phase 005 Intern
Fixed Fees

Monthly Intern Fee (July 2020)	2,272.73	
Total Fixed Fees	2,272.73	2,272.73

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020			Invoice	7045
					Total this Phase	\$2,272.73
Billing Limits		Current	Prior	To-Date		
Total Billings		64,427.48	490,257.90	554,685.38		
Limit				945,000.00		
Remaining				390,314.62		
					Total this Invoice	\$64,427.48
 Billings to Date						
		Current	Prior	Total		
Labor		48,422.50	375,303.75	423,726.25		
Subcontractor		13,732.25	100,990.50	114,722.75		
Expense		0.00	2,600.00	2,600.00		
Add-on		2,272.73	11,363.65	13,636.38		
Totals		64,427.48	490,257.90	554,685.38		

Project 7345 Rhode Island EERMC - 2020 Invoice 7045

Billing Backup

Friday, August 14, 2020

Optimal Energy Inc.

Invoice 7045 Dated 7/31/2020

10:25:03 AM

Phase 001 Policy & Strategy

Optimal Staff

			Hours	Rate	Amount
Belliveau, Eric	7/2/2020		1.00	195.00	195.00
		review Tim Wolfe chart and email on PIMs, discuss same with MG			
Belliveau, Eric	7/6/2020		1.00	195.00	195.00
		check and answers to Becca questions on PIMs issues, discussion with MG			
Belliveau, Eric	7/16/2020		2.75	195.00	536.25
		PIMS prep call, disc with MG on same, prep for and present at EERMC meeting			
Belliveau, Eric	7/17/2020		1.25	195.00	243.75
		PIMs call, prep with MG			
Belliveau, Eric	7/24/2020		2.25	195.00	438.75
		PIMs discussion, discuss PIM net v gross with Phil M, relay to Mike G			
Belliveau, Eric	7/29/2020		2.50	195.00	487.50
		pims discussion, revisit MA reasoning on net v gross, discuss with MG, 3YP meeting to discuss strategic initiatives and potential challenges.			
Belliveau, Eric	7/31/2020		.50	195.00	97.50
		review PIMS and discuss with MG on plan v actual			
Calcagni, Gretchen	7/29/2020		1.75	185.00	323.75
		Call to discuss RI 3-yr plan; reviewed materials from Mike on draft 3-yr plan			
Guerard, Michael	7/2/2020		1.50	195.00	292.50
		Bi-weekly OER/C-team chk in; PIMs update w Eric; update w Marisa on LCP Stds; AESC update w team			
Guerard, Michael	7/7/2020		4.25	195.00	828.75
		Send update to Division on 3YP comments; coord on codes/PIMs with EB/PM; NDA follow-up; draft EERMC agenbda review; follow-up w Marisa			
Guerard, Michael	7/8/2020		2.75	195.00	536.25
		EE TWG agenda review, comments to Matt; EERMC mtg prep			
Guerard, Michael	7/9/2020		1.75	195.00	341.25
		PIMs call, prep and debrief			
Guerard, Michael	7/10/2020		4.00	195.00	780.00
		EE TWG, prep and debriefs; C&S call w Grid, OER, Division			
Guerard, Michael	7/13/2020		1.50	195.00	292.50
		Bi-weekly chk-in w OER/Grid, follow-up; C&S prep w PM			
Guerard, Michael	7/14/2020		5.00	195.00	975.00
		Call w OER on state legislation, prep; council mtg prep, materials, update w Marisa			
Guerard, Michael	7/15/2020		1.50	195.00	292.50
		1-1 council call w Peter, BT, prep			
Guerard, Michael	7/16/2020		5.75	195.00	1,121.25
		EERMC mtg, prep and debriefs			
Guerard, Michael	7/17/2020		4.75	195.00	926.25
		OER bi-wkly chk-in; PIMs call, debrief; Htg electr. call			

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Page 4

Project	7345	Rhode Island EERMC - 2020			Invoice	7045
Guerard, Michael		7/23/2020	1.25	195.00	243.75	
		PUC Open mtg on Stds; legislation review				
Guerard, Michael		7/24/2020	1.50	195.00	292.50	
		PIM call w OER, Div; LCP data request discussion w team				
Guerard, Michael		7/27/2020	2.25	195.00	438.75	
		Bi-weekly chk-in w OER/Grid, prep and follow-up tasks; execute and return NDA				
Guerard, Michael		7/28/2020	1.75	195.00	341.25	
		PIMs update w EB, BT				
Guerard, Michael		7/31/2020	1.50	195.00	292.50	
		OER/Div bi-weekly chk-in, follow-up tasks				
Jacobs, Adam		7/7/2020	1.00	185.00	185.00	
		-RI 3YP - post-comment submittal next steps check-in				
		-RI daily scrum				
		-check-in w/ BOC on workforce				
Jacobs, Adam		7/21/2020	.25	185.00	46.25	
		-review June C&I data report				
Jacobs, Adam		7/24/2020	.75	185.00	138.75	
		-RI C&I lighting call				
		-MA/RI strategy for lighting program updates				
Jacobs, Adam		7/29/2020	.50	185.00	92.50	
		-C&I sector team prep call and draft agenda				
Jacobs, Adam		7/31/2020	.25	185.00	46.25	
		-C&I sector team call agenda distribution				
Mosenthal, Philip		7/24/2020	1.25	195.00	243.75	
		discs. re PI design, emails re codes and standards				
Ross, Samuel		7/9/2020	3.00	185.00	555.00	
		OER Webinar				
Ross, Samuel		7/14/2020	1.25	185.00	231.25	
		Correspondence, summary of project work re: heating electrification analysis				
Socks, Matthew		7/23/2020	1.50	185.00	277.50	
		Discuss AESC scope w/ B.Trietch et al, prep for same				
Socks, Matthew		7/24/2020	1.25	185.00	231.25	
		AESC check-in w/ S.Ross				
Socks, Matthew		7/30/2020	.75	185.00	138.75	
		Emailing B.Trietch regarding AESC scope decisions; coordinating response comments				
		Totals	65.75		12,698.75	
		Total Labor				12,698.75
				Total this Phase		\$12,698.75

Phase	002	Cyclical Planning & Reporting			
Optimal Staff					
			Hours	Rate	Amount
Caesar, Adrian		7/2/2020	3.25	130.00	422.50
		BC MPS Mapping tool infrastructure improvements - Evaluated data integration			

Project	7345	Rhode Island EERMC - 2020			Invoice	7045
Caesar, Adrian		7/17/2020	4.25	130.00		552.50
		Grid Monthly and Quarterly Res/C&I Data processing, raw data QA/QC				
Caesar, Adrian		7/20/2020	4.25	130.00		552.50
		Grid Monthly and Quarterly Res/C&I Data processing, raw data QA/QC, Reporting workbook infrastructure improvements				
Caesar, Adrian		7/21/2020	.50	130.00		65.00
		Res June Data Report finalization and distribution to Res C-Team group				
Caesar, Adrian		7/22/2020	6.00	130.00		780.00
		C&I Gas monthly/quarterly measure-end use mapping, Electric BC Model/MPS Mapping tool improvements				
Caesar, Adrian		7/23/2020	5.50	130.00		715.00
		Electric and Gas BC Model/MPS Mapping tool improvements				
Caesar, Adrian		7/28/2020	2.25	130.00		292.50
		Electric and Gas BC Model/MPS Mapping tool improvements and QA/QC, Measure-level comparisons				
Caesar, Adrian		7/29/2020	1.50	130.00		195.00
		Res Sector Team Comments review, June Report update and distribution				
Caesar, Adrian		7/30/2020	4.00	130.00		520.00
		Electric and Gas BC Model/MPS Mapping tool improvements and QA/QC, Measure-level comparisons				
Caesar, Adrian		7/31/2020	4.00	130.00		520.00
		Electric and Gas BC Model/MPS Mapping tool improvements, 2019 Actual Data and BC/MPS data QA/QC				
Chant, Elizabeth		7/20/2020	.50	195.00		97.50
		check in with internal team on strategies for 3YP review				
Chant, Elizabeth		7/27/2020	.50	195.00		97.50
		internal meeting on strategy for PA goals				
Guerard, Michael		7/1/2020	3.25	195.00		633.75
		Review updated 3YP sched from Matt/Grid; 3YP comments development, prep for monthly sector staregy calls, data review				
Guerard, Michael		7/2/2020	5.25	195.00		1,023.75
		C&I sector 3YP call; Rez 3YP call; prep and debriefs				
Guerard, Michael		7/3/2020	5.25	195.00		1,023.75
		Team coord and updates; debriefs and follow-up review of data from Sector mtgss; finalize and send 3YP comments to Grid				
Guerard, Michael		7/7/2020	2.25	195.00		438.75
		Review 2020 plan tracker, implications for 2021				
Guerard, Michael		7/8/2020	2.25	195.00		438.75
		Core team planning on 3YP next steps, needs				
Guerard, Michael		7/13/2020	2.00	195.00		390.00
		Team chk-in on 3YP next steps, mapping tool, startegies				
Guerard, Michael		7/15/2020	3.50	195.00		682.50
		IE call w Grid/OER, prep; MultiFamily call w NewEcology; SRP TWG update w SR				
Guerard, Michael		7/23/2020	1.25	195.00		243.75
		Codes attribution call				
Guerard, Michael		7/28/2020	3.50	195.00		682.50
		Rez tean chk-in; 3YP tasks, next steps mapping				
Guerard, Michael		7/29/2020	4.00	195.00		780.00

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Project	7345	Rhode Island EERMC - 2020		Invoice	7045
		Review monthly sector data; team call on 3YP costs, budgets; review schools HVAC/IAQ issue			
Guerard, Michael		7/31/2020	2.00	195.00	390.00
		Coord next steps on 3YP dev; calls on codes & stds			
Jacobs, Adam		7/1/2020	.75	185.00	138.75
		-follow-up w/ SMEs on feedback for C&I program enhancement matrix -C&I lighting follow-ups on EMV timing for NTG studies			
Jacobs, Adam		7/2/2020	2.50	185.00	462.50
		-consolidate final C&I program enhancements for Grid -RI C&I Team 3YP Review Session: Part 2			
Jacobs, Adam		7/6/2020	.25	185.00	46.25
		-OER priority and official C-team 3YP comment review			
Jacobs, Adam		7/8/2020	1.50	185.00	277.50
		-RI 3YP next steps; data -RI 3YP Review C&I - Comments and Next Steps			
Jacobs, Adam		7/9/2020	.25	185.00	46.25
		-detail C&I lighting product program support in next 3YP w/ Res			
Jacobs, Adam		7/10/2020	1.50	185.00	277.50
		-TWG call to review OER/C-team comments on 1st draft plan			
Jacobs, Adam		7/13/2020	1.50	185.00	277.50
		-review Green Energy Consumers Alliance comment on 1st draft plan -internal follow-ups on TWG call -RI 3YP - debrief on call w Becca/Matt on next steps -C&I actuals for mapping			
Jacobs, Adam		7/14/2020	.50	185.00	92.50
		-schedule C&I C-team check-in to review next steps w/ SMEs -connect Grid w/ CET commercial weatherization			
Jacobs, Adam		7/16/2020	2.00	185.00	370.00
		-RI daily scrum/council prep -IoT lighting controls -RI EERMC meeting (partial meeting in case C&I questions on 1st draft plan)			
Jacobs, Adam		7/20/2020	1.00	185.00	185.00
		-1/2 RI daily scrum check-in on to-be-scheduled meetings -cross-state call, MA/RI 3YP strategy -follow up w/ Mona on C&I 3YP next steps			
Jacobs, Adam		7/21/2020	.50	185.00	92.50
		-1/2 RI daily scrum (planning discussion) -follow-up w/ Mona RE: next-steps C&I planning -ICF CHP emissions study notes to EERMC consulting team			
Jacobs, Adam		7/24/2020	2.25	185.00	416.25
		-1/2 RI C-team daily scrum (planning discussion) -check-in call w/ Mona on C&I next steps -send out polls for scheduling next C&I planning calls to C-team, OER and Division -BC model/MPS mapping tool - gas end use review and final QA/QC -RI planning next steps on 3YR/annual			
Jacobs, Adam		7/27/2020	.25	185.00	46.25
		-multi-state check-in discussion on RI program goals/PIMs			
Jacobs, Adam		7/28/2020	.50	185.00	92.50
		-1/2 daily scrum planning focused -follow-ups on school funding/EE			

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Project	7345	Rhode Island EERMC - 2020			Invoice	7045
Jacobs, Adam		7/29/2020	1.50	185.00		277.50
		-RI 3YP strategy & tactics call -review initial responses and email follow-up to stakeholders for RI C&I planning meetings poll				
Jacobs, Adam		7/31/2020	.25	185.00		46.25
		-schedule and send out invites for planning meetings				
Johnson, Craig		7/2/2020	6.75	150.00		1,012.50
		Resi 3YR Plan Review Call and associated meeting prep and debrief. Compile key areas to focus on for Res team.				
Johnson, Craig		7/7/2020	.75	150.00		112.50
		Prep next steps for 3YP review w/ Adam and Mike. Schedule meeting for Codes negotiations.				
Johnson, Craig		7/8/2020	5.00	150.00		750.00
		Compile notes and data needs from Res 3YP meetings. Develop end-use waterfall charts that show Res and C&I in the same picture. 3YP review next steps strategy meeting w/ Mike, Adam, and Sam. E-mail to res team on coordinating next steps.				
Johnson, Craig		7/9/2020	1.50	150.00		225.00
		Coordinate next steps for Resi team work.				
Johnson, Craig		7/10/2020	1.50	150.00		225.00
		EE TWG.				
Johnson, Craig		7/13/2020	2.75	150.00		412.50
		3YP next steps and data requests for res team. Schedule code attribution negotiation.				
Johnson, Craig		7/15/2020	2.50	150.00		375.00
		Update visualizations of EE impacts for Becca. Review inputs and assumptions; emails about the same. Prep materials on EE TWG update memo to Council.				
Johnson, Craig		7/16/2020	2.50	150.00		375.00
		Post meeting materials to Council website. Council meeting.				
Johnson, Craig		7/17/2020	.25	150.00		37.50
		Export Council meeting recording and post to Sharefile.				
Johnson, Craig		7/22/2020	.25	150.00		37.50
		Coordinate on res monthly data review.				
Johnson, Craig		7/24/2020	.50	150.00		75.00
		Discuss OER data request for LCP research.				
Johnson, Craig		7/27/2020	.75	150.00		112.50
		Discuss next steps in 3YP for Res team w/ Laura				
Johnson, Craig		7/29/2020	2.75	150.00		412.50
		Prep agenda and next steps for Res meetings, 3YP next steps meeting w/ internal res team. Prep for RI Rest team call. Discuss school efficiency and funding w/ Adam.				
Ross, Samuel		7/8/2020	4.00	185.00		740.00
		Updated memo, PUC notification letter re: DR results; 3YP next data steps meeting; gas DR next steps				
Ross, Samuel		7/13/2020	1.50	185.00		277.50
		3YP mtg, prep, follow up				
Ross, Samuel		7/14/2020	1.75	185.00		323.75
		SRP TWG meeting prep; PUC letter discussions; initial quick review of revised Gas RBI model				
Ross, Samuel		7/15/2020	4.25	185.00		786.25

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Project	7345	Rhode Island EERMC - 2020			Invoice	7045
		SRP TWG, prep, follow-up; final tweaks to DR deliverable; draft SRP content for TWG update memo				
Ross, Samuel		7/16/2020	3.75	185.00		693.75
		Council mtg, prep re: same				
Ross, Samuel		7/17/2020	2.75	185.00		508.75
		C-Team Check in; Heating Elec call - prep re: same				
Ross, Samuel		7/20/2020	.75	185.00		138.75
		planning for week - finance follow ups, heating elec, 3YP, etc.				
Ross, Samuel		7/22/2020	1.50	185.00		277.50
		Gas R&B model review call, prep & follow up re: same; prep for SRP call w/OER next morning				
Ross, Samuel		7/23/2020	1.75	185.00		323.75
		PUC Open Meeting; SRP call, prep & follow-up re: same				
Ross, Samuel		7/24/2020	4.00	185.00		740.00
		AESC coordination call w/MA team; disc. re: LCP data request; Mapping tool revisions and expansions				
Ross, Samuel		7/28/2020	2.50	185.00		462.50
		gas rate and bill impacts model review meeting, prep re: same; finance planning, 3YP planning				
Ross, Samuel		7/30/2020	1.00	185.00		185.00
		MPS mapping tool disc. & review				
Ross, Samuel		7/31/2020	2.00	185.00		370.00
		BC MPS Mapping tool expansions review and feedback				
Schuur, Arah		7/21/2020	.50	195.00		97.50
		check in with internal team on 3YP review				
Schuur, Arah		7/27/2020	.50	195.00		97.50
		RI PIMs discussion				
Schuur, Arah		7/30/2020	1.00	195.00		195.00
		RI PIMs discussion				
		Totals	149.25			25,062.50
		Total Labor				25,062.50
					Total this Phase	\$36,759.75

Phase	003	EERMC Oversight - EMV			
Optimal Staff			Hours	Rate	Amount
Guerard, Michael		7/1/2020	1.00	195.00	195.00
		Monthly EMV chk-in call			
Guerard, Michael		7/3/2020	1.75	195.00	341.25
		Review feedback on NTG and other studies			
Guerard, Michael		7/6/2020	.75	195.00	146.25
		Review shelf stocking and Sense studies			
Guerard, Michael		7/20/2020	1.00	195.00	195.00
		Review drafts of multiple studies, prep for monthly mtg			
Guerard, Michael		7/22/2020	1.00	195.00	195.00
		Monthly rez EMV call			

Project	7345	Rhode Island EERMC - 2020			Invoice	7045
Guerard, Michael		7/27/2020	1.25	195.00	243.75	
		Review team comments on multiple EMV studies				
Jacobs, Adam		7/1/2020	1.50	185.00	277.50	
		-RI EM&V Monthly Check In (C-Team and Grid Team)				
		-NTG study sample plan review/comment				
Jacobs, Adam		7/6/2020	.75	185.00	138.75	
		-follow-ups on NGrid comments on NTG study sampling memo				
		-review RI CCEI Res and Comm Code Attribution Calculator				
Jacobs, Adam		7/13/2020	.25	185.00	46.25	
		-review RI Gas Load Shapes stage 3 workplan				
Jacobs, Adam		7/17/2020	2.75	185.00	508.75	
		-1/2 Steam Trap Working Group Session				
		-analyze all RI 2018 Custom Gas Desk Reviews site reports				
		-Grid custom electric/gas evaluation status check-in call				
Jacobs, Adam		7/20/2020	.75	185.00	138.75	
		-follow-ups on RI 2018 Custom Gas and Custom Electric Status w/ Ralph and Grid				
		-RI Gas Load Shapes study redline				
Jacobs, Adam		7/21/2020	.75	185.00	138.75	
		-RI Gas Load Shapes alternate sources research and outreach to former colleagues in gas supply business				
		-create and send sharefile folder for custom gas site reports to Jen Chiodo for review				
Jacobs, Adam		7/24/2020	.75	185.00	138.75	
		-gas load shapes follow-ups				
		-custom electric/gas impact site reports follow-ups				
Jacobs, Adam		7/28/2020	.25	185.00	46.25	
		-Rhode Island Heat Pump study Discussion next steps				
		-RI EMV and implementation coordinating strategy				
Johnson, Craig		7/1/2020	3.50	150.00	525.00	
		Residential & C&I Monthly EM&V meeting.				
		Review NTG study; compile and deliver C-Team comments on NTG study.				
Johnson, Craig		7/2/2020	.75	150.00	112.50	
		Follow up on action items from Res/C&I EM&V monthly meeting.				
Johnson, Craig		7/7/2020	2.50	150.00	375.00	
		Review Non-Participant Survey for Sense Study. Send out reminders to C-Team about review deadlines. Review comments on market characterization data collection 1-pager.				
Johnson, Craig		7/8/2020	1.50	150.00	225.00	
		Review CCEI Training and Permit Review Memo. Send memo to C-Team and OER for review.				
Johnson, Craig		7/9/2020	1.50	150.00	225.00	
		Review and respond to Behavior preliminary impact findings.				
Johnson, Craig		7/10/2020	4.50	150.00	675.00	
		Review Behavior preliminary impact findings. Review shelf stocking report and one-pager. Review, compile, and deliver C-Team and OER comments.				
Johnson, Craig		7/14/2020	3.00	150.00	450.00	
		Meeting w/ study team to review res retrofit preliminary results.				
Johnson, Craig		7/16/2020	.50	150.00	75.00	
		Review updated 1 pager for market characterization data collection study. Review CCEI training and permit review memo.				

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Project	7345	Rhode Island EERMC - 2020			Invoice	7045
Johnson, Craig		7/17/2020	4.50	150.00		675.00
		Review desk audits for 2018 custom gas study. Review/compile C-Team and OER comments on CCEI training and permit review memo. Final review of market characterization data collection study 1-pager. Review timeline of results for 2018 custom gas study w/ Grid and C-Team.				
Johnson, Craig		7/21/2020	1.00	150.00		150.00
		Monitor discussion on 2018 custom gas and electric studies. Review/distribute behavior evaluation draft report for review.				
Johnson, Craig		7/22/2020	3.00	150.00		450.00
		Coordinate review on res retrofit memos. Begin review of res retrofit memos. RI Res Monthly EM&V call.				
Johnson, Craig		7/23/2020	2.00	150.00		300.00
		Review Res retrofit memos.				
Johnson, Craig		7/27/2020	1.50	150.00		225.00
		Review res retrofit memos.				
Johnson, Craig		7/28/2020	1.00	150.00		150.00
		Review and compile comments on res retrofit memos.				
Mosenthal, Philip		7/9/2020	.50	195.00		97.50
		scheduling and discs. re C&S EMV				
Mosenthal, Philip		7/10/2020	1.25	195.00		243.75
		C&S EMV conf.; emails				
Mosenthal, Philip		7/13/2020	1.50	195.00		292.50
		Codes and standards ph w/ BT, emails and presentation rev. re same				
Mosenthal, Philip		7/15/2020	.50	195.00		97.50
		codes attribution slides reiew				
Mosenthal, Philip		7/16/2020	.50	195.00		97.50
		C&S permit data review				
Mosenthal, Philip		7/23/2020	1.25	195.00		243.75
		codes and standards conf. emails re ame				
Mosenthal, Philip		7/28/2020	3.00	195.00		585.00
		emails and rev. workpapers re C&S				
Mosenthal, Philip		7/30/2020	.75	195.00		146.25
		rev. codes and standards docs and analysis				
Mosenthal, Philip		7/31/2020	2.50	195.00		487.50
		work on code compliance methodology, conf. re same				
		Totals		57.00		9,653.75
		Total Labor				9,653.75
					Total this Phase	\$11,688.75

Phase	004	EERMC Oversight - Education/Stakeholders			
Optimal Staff					
			Hours	Rate	Amount
Caesar, Adrian		7/8/2020	.25	130.00	32.50
		EERMC Website updates			
Caesar, Adrian		7/10/2020	.25	130.00	32.50

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Project	7345	Rhode Island EERMC - 2020		Invoice	7045
		EERMC July mtg material upload			
Caesar, Adrian		7/16/2020	.25	130.00	32.50
		EERMC Website - July meeting edits and material upload			
Caesar, Adrian		7/17/2020	.50	130.00	65.00
		2020 Results and Reporting page creation, NGrid Q1 report upload, Website homepage updates			
Caesar, Adrian		7/20/2020	.25	130.00	32.50
		Legal Services RFP upload, RFP page edits			
Caesar, Adrian		7/29/2020	.25	130.00	32.50
		EERMC site updates - meeting minutes upload			
Guerard, Michael		7/15/2020	1.00	195.00	195.00
		Education group call			
Guerard, Michael		7/20/2020	1.50	195.00	292.50
		Retreat planning w RS			
Guerard, Michael		7/22/2020	1.50	195.00	292.50
		Retreat planning; call w Becca/Rachel, debriefs			
		Totals	5.75		1,007.50
		Total Labor			1,007.50
				Total this Phase	\$1,007.50
				Total this Project	\$62,154.75
				Total this Report	\$62,154.75

George Lawrence, Caerbannog Consulting
3540 Mountain Rd
Addison VT 05491

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 24
Invoice Date: July 31, 2020
OEI Project #: 7345

Work Performed for Rhode Island EERMC

Description of Services		Amount	
Services Performed 07/01/20 through 07/31/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	5.50	\$185.00	\$1,017.50
LABOR - Travel Hours	0.00	\$92.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$1,017.50</u>

George Lawrence, Caerbannog Consulting
Services Performed 07/01/20 through 07/31/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
7/1/20	.5 hr research upstream versus prescriptive lighting values, .75 hr evaluation and NTG e-mail discussion, .5 hr review Jen and Dan's suggestions for program improvements			1.75			1.75	0.00	1.75
7/2/2020	2 hr HVAC and Process planning call with National Grid		2.50				2.50	0.00	2.50
7/14/2020	E-mails about small business weatherization			0.25			0.25	0.00	0.25
7/15/2020	Review Tech Working group presentation			0.25			0.25	0.00	0.25
7/24/2020	Lighting call with National Grid			0.50			0.50	0.00	0.50
7/29/2020	Review 2nd quarter data			0.25			0.25	0.00	0.25
	Total hours	0.00	2.50	3.00	0.00	0.00	5.50	0.00	5.50
	Total Amount	\$0.00	\$62.50	\$555.00	\$0.00	\$0.00	\$1,017.50	0.00	\$1,017.50

Margie Lynch/Core Energy Insights, Inc.
111 Hooksett Road, Auburn, NH 03032

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 7-2020*
Invoice Date: *July 31, 2020*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services	Amount
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Services Performed 07/01/2020 through 07/31/2020

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	3.50	\$176.00	\$616.00

TOTAL DUE **\$616.00**

Margie Lync Core Energy Insights, Inc.

Services Performed 07/01/2020 through 07/31/2020

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
7/2/20	Participated in res strategy meeting		2.00				2.00	0.00	2.00
7/10/2020	Reviewed and edited 7.2 meeting notes		0.50				0.50	0.00	0.50
7/29/2020	Reviewed June data; participated in monthly prep call		1.00				1.00	0.00	1.00
							0.00	0.00	0.00
	Total hours	0.00	3.50	0.00	0.00	0.00	3.50	0.00	3.50
	Total Amount	\$0.00	\$616.00	\$0.00	\$0.00	\$0.00	\$616.00	0.00	\$616.00

Energy Futures Group, Inc.

PO Box 587
 Hinesburg, VT 05461
 Phone: (802) 482-5001
 Fax: (802) 329-2143



Invoice

TO: Optimal Energy Inc.
 April Clodgo
 10600 Route 116, Suite 3
 Hinesburg, VT 05461
 clodgo@optenergy.com

Invoice #:4136
 Invoice Date: 8/6/2020
 Invoice Period: 7/1/2020-7/31/2020
 Job Name: RI EERMC
 Terms: Net 30 Days
 PO # 3200362251

Consultant Labor	Job-Phase-Project	Project Description	Rate	Hours	Amount
Dan Mellinger	4104-00-02	Cyclical Planning & Reporting Activities	\$185.00	5.75	\$1,063.75
Glenn Reed	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	25.00	\$4,875.00
Richard Faesy	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	7.25	\$1,413.75
EFG Labor Subtotal:				38.00	\$7,352.50

TOTAL DUE THIS INVOICE: \$7,352.50 USD

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4136
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 7/1/2020-7/31/2020
Consultant: Dan Mellinger

Date	Phase-Project	Project Description	Hours Task Description
7/1/2020	00-02	Cyclical Planning & Reporting Activities	2.00 Update program design matrix
7/2/2020	00-02	Cyclical Planning & Reporting Activities	2.50 3YP material review and C&I sector call with NGrid
7/6/2020	00-02	Cyclical Planning & Reporting Activities	0.25 RI NTG info from Adam
7/16/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Review DOE IoT Upgradeable lighting challenge info from George
7/24/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Prep agenda for RI C&I lighting call; lead lighting call
TOTAL:			5.75

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4136
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 7/1/2020-7/31/2020
Consultant: Glenn Reed

Date	Phase-Project	Project Description	Hours Task Description
7/1/2020	00-02	Cyclical Planning & Reporting Activities	2.00 Follow up on HP tTarget numbers and Wx requirements
7/1/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Attend monthly Res/ EM&V check-in call
7/2/2020	00-02	Cyclical Planning & Reporting Activities	0.50 MF Target savings
7/2/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Review and comment on Three-year Plan targets
7/2/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Follow up on monthly EM&V call: C&S attribution
7/2/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Review and comment on draft Sense web survey
7/2/2020	00-02	Cyclical Planning & Reporting Activities	2.00 Attend monthly Res. Sector team meeting
7/6/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Fed lamps stds notice
7/9/2020	00-02	Cyclical Planning & Reporting Activities	1.75 Review of shelf stocking survey; summary comments
7/9/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review of Wx barrier data, call w/R. Faesy
7/9/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Final review of Behavior report
7/10/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Review of lighting in Three-year Plan and targets
7/13/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Analysis of June TRC lighting and products data
7/14/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Presentation of preliminary EM&V findings
7/16/2020	00-02	Cyclical Planning & Reporting Activities	0.25 NEEP Appliance Standards call
7/22/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Participate in monthly EM&V call
7/23/2020	00-02	Cyclical Planning & Reporting Activities	2.00 Review and comment on EW SF impact analysis draft report

7/23/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Initial review of June program data
7/27/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Review and comments on EW SF and MF Impact draft reports
7/29/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Review and comment on June Res. Data
7/29/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Attend monthly RI Res. CT prep call
7/30/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Review and comment on Behavior draft report
7/30/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Review and comments on Shelf stocking "final" report and one-pager
7/30/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Attend NEEP ASHP webinar, follow up on CESA Thermal Renewable calculator
7/31/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Follow up on Behavior report comments

TOTAL:			25.00
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Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4136
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 7/1/2020-7/31/2020
Consultant: Richard Faesy

Date	Phase-Project	Project Description	Hours Task Description
7/2/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Ngrid res plan meeting to review barriers
7/8/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Check in with M. Guerard on plan status
7/9/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Barriers follow up
7/10/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Review plan docs, follow up
7/23/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Review Q2 data
7/27/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Q2 data follow up
7/28/2020	00-02	Cyclical Planning & Reporting Activities	1.00 NE Consultants coordination call
7/29/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Prep then C-Team meeting, Data review and follow up.
TOTAL:			7.25

Pay to: Jennifer Chiodo
JLC Consulting, LLC
52 Bent Creek Road
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-2020.04*
Invoice Date: *July 31, 2020*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 7/1/2020 through 7/31/2020			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	16.75	\$195.00	\$3,266.25
LABOR - Travel Hours	0.00	\$97.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$3,266.25</u>

Pay to Jennifer Ciodo

Services Performed 7/1/2020 through 7/31/2020

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education State Holders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
7/1/20	Develop and document input on 3 year plan		5.00				5.00	0.00	5.00
7/2/2020	Planning meeting, review slides, follow up		3.25				3.25	0.00	3.25
7/7/2020	C&I Envelope research		2.25				2.25	0.00	2.25
7/8/2020	Review planning material updates		1.00				1.00	0.00	1.00
7/9/2020	Comments on planning inputs		1.00				1.00	0.00	1.00
7/13/2020	Follow up on NY contacts for State of RI		0.75				0.75	0.00	0.75
7/21/2020	Gas evaluation site review		1.00				1.00	0.00	1.00
7/27/2020	Planning emails		0.50				0.50	0.00	0.50
7/29/2020	Planning call		0.75				0.75	0.00	0.75
7/31/2020	NY follow up, Annual plan, HVAC		1.25				1.25	0.00	1.25
							0.00	0.00	0.00
	Total hours	0.00	16.75	0.00	0.00	0.00	16.75	0.00	16.75
	Total Amount	\$0.00	\$3,266.25	\$0.00	\$0.00	\$0.00	\$3,266.25	0.00	\$3,266.25

Rachel Sholly
48 Hudson Street
Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 31
Invoice Date: July 31, 2020
OEI Project #: 7345

Work Performed for National Grid USA Service Company

Description of Services	Amount		
Services Performed 07/01/20 through 07/31/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	10.00	\$148.00	\$1,480.00
LABOR - Travel Hours	0.00	\$74.00	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$1,000.00</u>

Rachel Solly

Services Performed 07/01/20 through 07/31/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
7/15/2020	Edu call			1.25			1.25	0.00	1.25
7/20/2020	EERMC public forum mtg w/URI & Mark; Retreat mtg w/Mike; Follow-up communications			2.25			2.25	0.00	2.25
7/22/2020	EERMC public forum mtg w/URI & Yasmin; Retreat planning call w/Becca & Mike			2.25			2.25	0.00	2.25
7/27/2020	Drafted retreat description			1.75			1.75	0.00	1.75
7/29/2020	Retreat planning; Edu call notes & follow-up; Reviewed URI's draft forum plan			1.50			1.50	0.00	1.50
7/30/2020	EERMC forum planning; Edu call communications			1.00			1.00	0.00	1.00
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	10.00	0.00	0.00	10.00	0.00	10.00
	Total Amount	\$0.00	\$0.00	\$1,000.00	\$0.00	\$0.00	\$1,000.00	0.00	\$1,000.00

Invoice



August 31, 2020
Project No: 7345
Invoice No: 7052

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2020
PO #:

Professional Services from August 1, 2020 to August 31, 2020

Phase 001 Policy & Strategy

Optimal Staff

	Hours	Rate	Amount
Belliveau, Eric	9.00	195.00	1,755.00
Chant, Elizabeth	2.25	195.00	438.75
Guerard, Michael	17.75	195.00	3,461.25
Jacobs, Adam	3.25	185.00	601.25
Keating, Griffith	4.25	130.00	552.50
Socks, Matthew	3.00	185.00	555.00
Totals	39.50		7,363.75
Total Labor			7,363.75

Subcontractors

Caerbannog Consulting, LLC	740.00
Ralph Prah	11,651.25
Total Subcontractors	12,391.25

Total this Phase \$19,755.00

Phase 002 Cyclical Planning & Reporting

Optimal Staff

	Hours	Rate	Amount
Caesar, Adrian	41.00	130.00	5,330.00
Calcagni, Gretchen	4.25	185.00	786.25

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020		Invoice	7052
	Chant, Elizabeth	1.75	195.00	341.25	
	Guerard, Michael	35.25	195.00	6,873.75	
	Jacobs, Adam	18.25	185.00	3,376.25	
	Johnson, Craig	51.00	150.00	7,650.00	
	Ross, Samuel	56.00	185.00	10,360.00	
	Totals	207.50		34,717.50	
	Total Labor				34,717.50

Subcontractors

Core Energy Insights Inc.	1,276.00	
Caerbannog Consulting, LLC	416.25	
JLC Consulting, LLC	1,365.00	
Energy Futures Group, Inc.	7,741.25	
Total Subcontractors	10,798.50	10,798.50

Total this Phase \$45,516.00

Phase 003 EERMC Oversight - EMV

Optimal Staff

	Hours	Rate	Amount	
Guerard, Michael	7.00	195.00	1,365.00	
Jacobs, Adam	3.25	185.00	601.25	
Johnson, Craig	35.75	150.00	5,362.50	
Mosenthal, Philip	11.50	195.00	2,242.50	
Totals	57.50		9,571.25	
Total Labor				9,571.25

Subcontractors

Rachel Sholly	3,848.00	
JLC Consulting, LLC	341.25	
Total Subcontractors	4,189.25	4,189.25

Total this Phase \$13,760.50

Phase 004 EERMC Oversight - Education/Stakeholders

Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	1.50	130.00	195.00	
Guerard, Michael	5.50	195.00	1,072.50	
Totals	7.00		1,267.50	
Total Labor				1,267.50

Total this Phase \$1,267.50

Phase 005 Intern

Project	7345	Rhode Island EERMC - 2020	Invoice	7052
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Fixed Fees

Monthly Intern Fee (August 2020)		2,272.73	
Total Fixed Fees		2,272.73	2,272.73
		Total this Phase	\$2,272.73

Billing Limits

	Current	Prior	To-Date	
Total Billings	82,571.73	554,685.38	637,257.11	
Limit			945,000.00	
Remaining			307,742.89	
		Total this Invoice		\$82,571.73

Billings to Date

	Current	Prior	Total
Labor	52,920.00	423,726.25	476,646.25
Subcontractor	27,379.00	114,722.75	142,101.75
Expense	0.00	2,600.00	2,600.00
Add-on	2,272.73	13,636.38	15,909.11
Totals	82,571.73	554,685.38	637,257.11

Project 7345 Rhode Island EERMC - 2020 Invoice 7052

Billing Backup

Tuesday, September 15, 2020

Optimal Energy Inc.

Invoice 7052 Dated 8/31/2020

11:29:37 AM

Phase 001 Policy & Strategy

Optimal Staff

			Hours	Rate	Amount
Belliveau, Eric	8/5/2020		2.00	195.00	390.00
		PIMS prep call, PIMS call, data comparison with MA.			
Belliveau, Eric	8/11/2020		1.50	195.00	292.50
		pims prep with MG and review additional information on comparisons to MA and NJ on PIM distribution on benefits v cost v load			
Belliveau, Eric	8/12/2020		1.75	195.00	341.25
		PIMS call and prep			
Belliveau, Eric	8/14/2020		1.50	195.00	292.50
		partial attendance for tech group call--barriers and EMV, debrief with MG			
Belliveau, Eric	8/31/2020		2.25	195.00	438.75
		pims discussion, prep read JT email, discussion with MG			
Chant, Elizabeth	8/5/2020		1.25	195.00	243.75
		meet with Guerard, Sholly, Lynch to outline equity issues, points of entry, potential collaborators; follow up on demographics for RI; email			
Chant, Elizabeth	8/10/2020		.50	195.00	97.50
		emails with Guerard on schedule for equity discussion			
Chant, Elizabeth	8/25/2020		.50	195.00	97.50
		pull together list of community energy organizations			
Guerard, Michael	8/5/2020		3.25	195.00	633.75
		PIMs call w OER/Grid/Division, prep and debrief calls w Eric; NEEP webinar for RI opps/benefits from regional initiatives			
Guerard, Michael	8/10/2020		1.25	195.00	243.75
		OER/Grid bi-weekly chk-in, follow-up tasks; Update to C.Kearns on legislation data			
Guerard, Michael	8/11/2020		1.25	195.00	243.75
		Prep for PIMs and TWG meetings			
Guerard, Michael	8/12/2020		1.50	195.00	292.50
		EE PIM discussion w OER/Div/Grid, debrief w EB			
Guerard, Michael	8/14/2020		4.00	195.00	780.00
		EE TWG, prep and debriefs; call w Acadia/Kai and OER			
Guerard, Michael	8/17/2020		1.50	195.00	292.50
		Weekly chk-in w OER/Grid; EERMC mtg prep			
Guerard, Michael	8/20/2020		4.00	195.00	780.00
		EERMC mtg, prep and debriefs; debrief on Equity grp mtg			
Guerard, Michael	8/31/2020		1.00	195.00	195.00
		Weekly chk-in w OER/Grid, prep and follow-up tasks			
Jacobs, Adam	8/3/2020		.25	185.00	46.25
		-1/2 multi-state call discussion on schools			

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Page 4

Project	7345	Rhode Island EERMC - 2020			Invoice	7052
Jacobs, Adam		8/6/2020	1.75	185.00	323.75	
		-C&I sector team call rescheduling due to storm duty; prep				
		-C&I sector team call				
Jacobs, Adam		8/24/2020	.25	185.00	46.25	
		-1/2 SEM/ESPO convo w/ New Ecology				
Jacobs, Adam		8/25/2020	.75	185.00	138.75	
		-review RI Q2 report				
		-LLC follow-ups for lighting controls				
		-C&I Program Data through July data request				
Jacobs, Adam		8/28/2020	.25	185.00	46.25	
		-streetlight tariff analysis/team discussion				
Keating, Griffith		8/5/2020	2.25	130.00	292.50	
		Gather DEvMA National Grid comparison data for strategic planning purposes				
Keating, Griffith		8/6/2020	1.00	130.00	130.00	
		Additional data gathering regarding planning process/performance incentive				
Keating, Griffith		8/7/2020	1.00	130.00	130.00	
		Comparing Cadmus tool to Navigant tool				
		Some last updates to RIvMA data				
Socks, Matthew		8/13/2020	1.00	185.00	185.00	
		Participating in AESC 2021 Kickoff call				
Socks, Matthew		8/14/2020	1.25	185.00	231.25	
		AESC 2018 review/prep for AESC 2021 methodology dev				
Socks, Matthew		8/20/2020	.75	185.00	138.75	
		Summarizing priority AESC issues; scheduling internal check-ins				
		Totals	39.50		7,363.75	
		Total Labor				7,363.75
				Total this Phase		\$19,755.00

Phase	002	Cyclical Planning & Reporting			
Optimal Staff					
			Hours	Rate	Amount
Caesar, Adrian		8/2/2020	2.50	130.00	325.00
		BC Model/MPS/Actuals Electric and Gas Mapping Tool improvements			
Caesar, Adrian		8/4/2020	2.00	130.00	260.00
		Electric and Gas updated BC/MPS mapping tool finalization and distribution			
Caesar, Adrian		8/6/2020	3.00	130.00	390.00
		RI Res and C&I August Sector Team mtgs			
Caesar, Adrian		8/10/2020	5.00	130.00	650.00
		BC/MPS - updated MPS Detailed Results QA and Electric/Gas Mapping Tool updates, LCP Research request,			
Caesar, Adrian		8/17/2020	4.25	130.00	552.50
		Res Sector Team mtg, BC/MPS - updated MPS Detailed Results QA and Electric/Gas Mapping Tool updates			
Caesar, Adrian		8/20/2020	3.00	130.00	390.00
		Electric BC MPS mapping tool improvements - Annual Plan BC Model data infrastructure buildout			

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Project	7345	Rhode Island EERMC - 2020			Invoice	7052
Caesar, Adrian		8/24/2020	4.50	130.00		585.00
		Electric and Gas BC MPS mapping tool improvements - Annual Plan BC Model data infrastructure buildout, LCP-related data request analysis				
Caesar, Adrian		8/25/2020	4.25	130.00		552.50
		July Res Data Report processing, National Grid Q2 Report review				
Caesar, Adrian		8/26/2020	5.50	130.00		715.00
		Electric and Gas BC MPS mapping tool improvements - Annual Plan BC Model data infrastructure and Barrier Mitigation analysis buildout				
Caesar, Adrian		8/27/2020	2.25	130.00		292.50
		C&I Finance Strategy Meeting & notetaking and cleanup, Clean Energy/EE advocacy and community partnership orgs research				
Caesar, Adrian		8/31/2020	4.75	130.00		617.50
		BC/MPS Mapping tool - 2021 AP BCR data integration				
Calcagni, Gretchen		8/3/2020	.25	185.00		46.25
		Found cost curve sources and sent to Adam				
Calcagni, Gretchen		8/5/2020	1.00	185.00		185.00
		Talked with Eric about data request related to PI and other data comparison in RI/MA; followed-up with Griff about data to pull and analyze related to request; reviewed analysis from Griff and sent to Eric				
Calcagni, Gretchen		8/6/2020	1.00	185.00		185.00
		Followed-up with Griff on additional data needed for PI comparative analysis and reviewed new analysis				
Calcagni, Gretchen		8/7/2020	1.00	185.00		185.00
		Additional analysis on RI vs MA PI				
Calcagni, Gretchen		8/11/2020	1.00	185.00		185.00
		Sent results of PIMs to Eric and Mike; Call with Eric and Mike to discuss PIM				
Chant, Elizabeth		8/13/2020	.25	195.00		48.75
		email for details on 8/14 meeting				
Chant, Elizabeth		8/20/2020	1.50	195.00		292.50
		prepare for and participate in EE Equity follow-up meeting with OER and Grid; pull and send links to MA nonparticipant study to Sholly and Guerard				
Guerard, Michael		8/3/2020	2.25	195.00		438.75
		Team coord on Plan development staeps, key issues				
Guerard, Michael		8/4/2020	3.50	195.00		682.50
		Team call on workforce barrier, next steps; prep for equity deep dive w team; prep for rez sector mtgs				
Guerard, Michael		8/5/2020	2.50	195.00		487.50
		Prep for Rez sector strategy monthly call; Team chk-in on Equity				
Guerard, Michael		8/6/2020	3.75	195.00		731.25
		Review MPS tracker; Rez monthly mtg; C&I monthly mtg				
Guerard, Michael		8/11/2020	3.50	195.00		682.50
		BP research on sectors, team coord and scheduling/process planning				
Guerard, Michael		8/12/2020	4.75	195.00		926.25
		TWG mtg prep, team coord; Prep for sector mtgs; review data, BP, barrier issues; chk on NDA status w Grid				
Guerard, Michael		8/17/2020	4.00	195.00		780.00
		Rez sector planning mtg, prep and follow-up; team coord on next steps; data review				
Guerard, Michael		8/18/2020	4.25	195.00		828.75

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Project	7345	Rhode Island EERMC - 2020			Invoice	7052
		Rez sector planning mtg; prep and follow-up; team coord on next steps; data review; SRP mtg prep w team				
Guerard, Michael		8/26/2020	4.25	195.00		828.75
		Review Q2 report; Sector planning review and updates w team; MPS mapping updates; debrief w Phil on C&S PIMs; rez financing mtg prep				
Guerard, Michael		8/31/2020	2.50	195.00		487.50
		PIM call w OER/Grid/Division, prep and debrief w EB; prep for Secotor meetings w team				
Jacobs, Adam		8/3/2020	.25	185.00		46.25
		-RI planning research on marginal EE cost curve				
Jacobs, Adam		8/4/2020	.75	185.00		138.75
		-workforce development next steps internal call				
Jacobs, Adam		8/5/2020	.75	185.00		138.75
		-review final BC MPS mapping results for electric/gas and cross-sector issues				
		-finalize workforce dev agenda				
Jacobs, Adam		8/6/2020	.25	185.00		46.25
		-RI EE Workforce Strategy Meeting				
Jacobs, Adam		8/7/2020	.25	185.00		46.25
		-1/2 RI daily scrum planning next steps				
Jacobs, Adam		8/11/2020	1.00	185.00		185.00
		-1/2 RI daily scrum focus on planning				
		-Prep for RI Sector mtgs				
		-1/4 NE Consultants Check-In				
Jacobs, Adam		8/12/2020	.25	185.00		46.25
		-sector teams meeting agenda development				
Jacobs, Adam		8/13/2020	.25	185.00		46.25
		-follow-up w/ Mona on barriers prep for TWG				
Jacobs, Adam		8/17/2020	2.75	185.00		508.75
		-1/2 daily scrum (workforce, TWG, C&I sector next steps)				
		-multi-state call PIMs and planning discussion				
		-C&I sector team planning call agenda drafting and distribution				
		-RI Rez sector debrief, C&I prep				
		-follow-up w/ Grid on C-team matrix suggestions				
Jacobs, Adam		8/18/2020	.50	185.00		92.50
		-check-in w/ Mona on barriers				
		-follow-up w/ Mike on barriers				
Jacobs, Adam		8/20/2020	2.00	185.00		370.00
		-workforce prep/document assembly				
		-workforce strategy call				
		-review NGrid planning update slides for EERMC				
Jacobs, Adam		8/21/2020	2.00	185.00		370.00
		-EERMC Agenda, Meeting Materials & Important Action Items				
		-C&I sector team call				
		-follow-up notes on workforce dev call				
Jacobs, Adam		8/24/2020	1.00	185.00		185.00
		-review and approve finalized notes on workforce dev planning call				
		-notes and follow-ups from C&I sector planning call				
Jacobs, Adam		8/25/2020	.25	185.00		46.25
		-1/2 RI daily scrum (planning discussion)				
Jacobs, Adam		8/26/2020	1.75	185.00		323.75

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Project	7345	Rhode Island EERMC - 2020			Invoice	7052
		-update sharefile for subs w/ latest BC-MPS gap analysis -C&I sector team prep call -barrier prioritization convo -check-in on BC/MPS mapping barrier mitigation module				
Jacobs, Adam		8/28/2020	1.50	185.00		277.50
		-initial review of 1st draft 2021 plan docs -update sharefile for C&I sector team to review -delegate C&I review tasks for 2021 annual plan -check-in w/ Craig on sector team strategies				
Jacobs, Adam		8/31/2020	2.75	185.00		508.75
		-1/2 daily scrum check-in on planning -Plan for 2021 Plan Data Work (call) -Updated Measure Mapping call -agenda for C&I sector team meeting -cross-sector planning coordination				
Johnson, Craig		8/3/2020	3.50	150.00		525.00
		Prepare agenda for upcoming residential sector team call. Prepare thoughts around planning meetings for upcoming residential planning meetings.				
Johnson, Craig		8/4/2020	2.00	150.00		300.00
		Discuss res meeting agenda and next steps w/ Mike. Discuss workforce planning and next steps w/ Adam, Mike and Rachel.				
Johnson, Craig		8/5/2020	1.25	150.00		187.50
		Check-in w/ Laura on Res team meetings. Prep for upcoming res team meetings.				
Johnson, Craig		8/6/2020	5.50	150.00		825.00
		Monthly res sector team meeting and meeting prep. Review agenda for workforce meeting. Respond to question about availability of load by sector for PIMs conversation.				
Johnson, Craig		8/7/2020	2.00	150.00		300.00
		Discuss OER LCP data request w/ Mike, Sam and Adrian. Discussion on updates/next steps for 3YP and BC/MPS mapping tool.				
Johnson, Craig		8/10/2020	3.00	150.00		450.00
		Schedule res planning meetings. OER LCP data request research and analysis.				
Johnson, Craig		8/11/2020	1.50	150.00		225.00
		Strategize w/ Mike and Adam on sector team planning meetings. Prep materials for planning meetings.				
Johnson, Craig		8/12/2020	2.50	150.00		375.00
		Prep meeting agenda for Res planning meetings. Check-in w/ Mike and Adam about the same.				
Johnson, Craig		8/13/2020	1.25	150.00		187.50
		C-Team/OER check-in call.				
Johnson, Craig		8/14/2020	3.25	150.00		487.50
		TWG Meeting.				
Johnson, Craig		8/17/2020	4.00	150.00		600.00
		Resi planning meeting #1 and associated meeting prep. Debrief meeting w/ Mike and Adam.				
Johnson, Craig		8/18/2020	4.00	150.00		600.00
		Resi planning meeting #2 and associated meeting prep. Discuss EM&V presentation for Council meeting w/ Mike; work on presentation.				
Johnson, Craig		8/19/2020	3.00	150.00		450.00
		Develop slides for Council presentation on EM&V.				
Johnson, Craig		8/20/2020	4.00	150.00		600.00

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020			Invoice	7052
		Workforce planning meeting. Council meeting.				
Johnson, Craig		8/24/2020	4.00	150.00		600.00
		OER LCP data request - research and analysis.				
Johnson, Craig		8/25/2020	1.00	150.00		150.00
		2021 Plan Review prep. Review NGrid Q2 report; coordinate data reports through July w/ Adrian.				
Johnson, Craig		8/26/2020	2.25	150.00		337.50
		2021 Annual Plan review prep. Resi team meeting prep.				
Johnson, Craig		8/28/2020	3.00	150.00		450.00
		Draft agenda for Resi team meeting. Review 2021 first draft annual plan. Distribute draft to resi team for review.				
Ross, Samuel		8/3/2020	2.00	185.00		370.00
		BCR / MPS Mapping Tool				
Ross, Samuel		8/4/2020	4.00	185.00		740.00
		SRP 3YP Review				
Ross, Samuel		8/5/2020	2.00	185.00		370.00
		SRP Plan Review; Gas DR call + prep and follow up				
Ross, Samuel		8/6/2020	2.00	185.00		370.00
		Res sector team mtg; continued SRP review				
Ross, Samuel		8/7/2020	3.00	185.00		555.00
		OER data request planning call; finance check-in planning; finance data disc; COVID sensitivity follow-up				
Ross, Samuel		8/10/2020	2.00	185.00		370.00
		financing check-in, prep, follow-up				
Ross, Samuel		8/14/2020	5.50	185.00		1,017.50
		SRP 3YP stakeholder comment review, slide deck prep, finalizing C-Team comments				
Ross, Samuel		8/17/2020	2.50	185.00		462.50
		Res sector team planning; finance mtg planning				
Ross, Samuel		8/18/2020	3.25	185.00		601.25
		Res sector team planning; SRP TWG Prep				
Ross, Samuel		8/19/2020	3.50	185.00		647.50
		SRP TWG and prep; Council meeting prep				
Ross, Samuel		8/20/2020	7.25	185.00		1,341.25
		Council-meeting, prep, follow-up; draft of memo for Kurt response; finance agenda drafting				
Ross, Samuel		8/21/2020	4.25	185.00		786.25
		Finance mtg, prep, follow-up re: same; planning for follow-up w/Peter				
Ross, Samuel		8/24/2020	3.50	185.00		647.50
		drafting memo for Council Member follow up; planning work re: annual + 3YP next steps				
Ross, Samuel		8/25/2020	1.50	185.00		277.50
		Council Member correspondence; mtg re: same				
Ross, Samuel		8/26/2020	1.50	185.00		277.50
		BC MPS tool iteration; prep for 2021 BCR Model				
Ross, Samuel		8/27/2020	1.50	185.00		277.50
		C&I Finance Meeting, prep and follow-up				
Ross, Samuel		8/28/2020	1.75	185.00		323.75
		C-Team Check-in; Res financing call prep & rescheduling				

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020			Invoice	7052
Ross, Samuel		8/31/2020	5.00	185.00	925.00	
	2021 Draft Plan BCR Model data analysis planning & review; data request planning; finance scheduling; council member correspondence					
	Totals		207.50		34,717.50	
	Total Labor					34,717.50
				Total this Phase		\$45,516.00

Phase 003 EERMC Oversight - EMV

Optimal Staff

			Hours	Rate	Amount
Guerard, Michael	8/6/2020	Review active EMV studies and team/stakeholder comments	2.00	195.00	390.00
Guerard, Michael	8/10/2020	EMV call w Cadmus on HP study	1.50	195.00	292.50
Guerard, Michael	8/11/2020	Review EMV tracker for Plan impact potential	1.25	195.00	243.75
Guerard, Michael	8/26/2020	Rez EMV monthly call	1.00	195.00	195.00
Guerard, Michael	8/31/2020	Review multiple studies comments, discussion points w team and Grid/vendor	1.25	195.00	243.75
Jacobs, Adam	8/5/2020	-C&I EM&V call	1.25	185.00	231.25
Jacobs, Adam	8/7/2020	-check-in w/ Craig on C&I strategic electrification meeting w/ Cadmus	.25	185.00	46.25
Jacobs, Adam	8/10/2020	-Review latest C&I Free-ridership and Spillover Study Sample Plan	.50	185.00	92.50
Jacobs, Adam	8/13/2020	-Rhode Island Heat Pump study typology v5 doc review	.50	185.00	92.50
Jacobs, Adam	8/26/2020	-Rhode Island Heat Pump C&I study options, next steps on C&I surveys	.50	185.00	92.50
Jacobs, Adam	8/27/2020	-RI PY2018 Custom Gas Evaluation Memo review/comments	.25	185.00	46.25
Jacobs, Adam	8/27/2020	-final notes on RI PY2018 Custom Gas Evaluation Memo			
Johnson, Craig	8/3/2020	Review final report on shelf stocking study; provide comments and feedback. Review behavior evaluation report and one-pager; compile and deliver comments to NGrid and evaluation team.	3.50	150.00	525.00
Johnson, Craig	8/5/2020	C&I Monthly EM&V Meeting; meeting prep.	2.75	150.00	412.50
Johnson, Craig	8/6/2020	Follow up on notes from monthly C&I EM&V call.	.50	150.00	75.00
Johnson, Craig	8/7/2020	Review/prepare for meeting with Cadmus on RI Heat Pump Study. Meeting on RI Heat Pump Study - discussion on cost-effectiveness tool and next steps for C&I survey/completion of Res portion of the study.	3.00	150.00	450.00

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Project	7345	Rhode Island EERMC - 2020			Invoice	7052
Johnson, Craig		8/10/2020	.50	150.00	75.00	
		Review and provide feedback on implementation vendor e-mail for legislated survey.				
Johnson, Craig		8/11/2020	4.50	150.00	675.00	
		Review RI Resi EM&V umbrella RFP. Review/prep EM&V materials for TWG meeting. Review National Grid RI Gas Load Shapes Stage 3 workplan. Review/prep review of EWSF and EWMF Impact/Process evaluation.				
Johnson, Craig		8/12/2020	4.00	150.00	600.00	
		Prep EM&V 101 presentation for TWG meeting.				
Johnson, Craig		8/14/2020	2.75	150.00	412.50	
		Prep for EM&V presentation at TWG meeting. Provide feedback on heat pump market study. Review EWSF and EWMF retrofit studies.				
Johnson, Craig		8/17/2020	1.00	150.00	150.00	
		Legislative Study working group meeting.				
Johnson, Craig		8/25/2020	6.00	150.00	900.00	
		Review/comment on EWSF and EWMF studies. Review final CCEI training permit review memo. Review/coordinate review on 2018 custom gas preliminary memo. Review final 2017 custom gas one-pager. Review regional lighting sales data draft report. Review legislative task 2 report.				
Johnson, Craig		8/26/2020	2.00	150.00	300.00	
		Distribute comments on legislative task 2 report. Monthly Res EM&V meeting and meeting prep.				
Johnson, Craig		8/27/2020	2.50	150.00	375.00	
		Review comments on regional lighting sales data draft report. Review comments on 2018 custom gas evaluation memo.				
Johnson, Craig		8/28/2020	2.00	150.00	300.00	
		Review and distribute comments on heat pump market assessment and cost-effectiveness model.				
Johnson, Craig		8/31/2020	.75	150.00	112.50	
		Monitor e-mail traffic on regional lighting sales data draft report. Review/catalog final EWSF and EWMF impact/process evaluation studies. Review 2017 custom gas one-pager. Review update from NGrid on 2018 Custom gas study.				
Mosenthal, Philip		8/13/2020	.75	195.00	146.25	
		C&S ph. Ke3vin re compliance, emails re same				
Mosenthal, Philip		8/14/2020	2.75	195.00	536.25	
		C&S emails and analysis review				
Mosenthal, Philip		8/18/2020	.25	195.00	48.75	
		C&S emails				
Mosenthal, Philip		8/19/2020	2.50	195.00	487.50	
		conf. w/ RP, rev. C&S analysis, ph MG, emails re same				
Mosenthal, Philip		8/20/2020	1.25	195.00	243.75	
		emails and disc. re C&S compliance				
Mosenthal, Philip		8/24/2020	1.00	195.00	195.00	
		CCEI conf. w/ OER, RP, rev. analysis and scheduling				
Mosenthal, Philip		8/26/2020	.50	195.00	97.50	
		conf. re C&S attribution for compliance				
Mosenthal, Philip		8/27/2020	2.25	195.00	438.75	
		C&S conf. re EMV, rev. materials and emails re same				
Mosenthal, Philip		8/31/2020	.25	195.00	48.75	

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020	Invoice	7052
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emails re C&S EMV

Totals

57.50

9,571.25

Total Labor

9,571.25

Total this Phase

\$13,760.50

Phase 004 EERMC Oversight - Education/Stakeholders

Optimal Staff

			Hours	Rate	Amount	
Caesar, Adrian	8/11/2020		.25	130.00	32.50	
EERMC website updates						
Caesar, Adrian	8/16/2020		.25	130.00	32.50	
EERMC Website updates - August Materials Upload						
Caesar, Adrian	8/19/2020		.25	130.00	32.50	
EERMC Site updates - August Meeting Materials Upload						
Caesar, Adrian	8/20/2020		.25	130.00	32.50	
EERMC Site updates - August Meeting Materials Upload						
Caesar, Adrian	8/25/2020		.25	130.00	32.50	
EERMC site updates						
Caesar, Adrian	8/27/2020		.25	130.00	32.50	
EERMC Website updates - EM&V studies upload						
Guerard, Michael	8/4/2020		1.50	195.00	292.50	
Retreat planning, chk-in w RS						
Guerard, Michael	8/5/2020		1.00	195.00	195.00	
Education subcommittee call prep						
Guerard, Michael	8/6/2020		.75	195.00	146.25	
Follow-up work on Retreat						
Guerard, Michael	8/12/2020		.25	195.00	48.75	
Scheduleing mtg w Acadia/Kai						
Guerard, Michael	8/18/2020		1.00	195.00	195.00	
Education subcomm call, prep						
Guerard, Michael	8/31/2020		1.00	195.00	195.00	
Review retreat agenda; retreat planning call w Rachel						
Totals			7.00		1,267.50	
Total Labor						1,267.50
					Total this Phase	\$1,267.50
					Total this Project	\$80,299.00
					Total this Report	\$80,299.00

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

George Lawrence, Caerbannog Consulting
3540 Mountain Rd
Addison VT 05491

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 27
Invoice Date: August 31, 2020
OEI Project #: 7345

Work Performed for Rhode Island EERMC

Description of Services		Amount	
Services Performed 8/1/2020 through 8/31/2020			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	6.25	\$185.00	\$1,156.25
LABOR - Travel Hours	0.00	\$92.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$1,156.25</u>

George Lawrence, Caerbannog Consulting
Services Performed 01/2020 through 03/2020

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning & Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
8/6/20	1 hr Call with National Grid, .5 hr prep for call	1.50					1.50	0.00	1.50
8/12/2020	1 hr Upstream lighting call w/ Grid	1.00					1.00	0.00	1.00
8/18/2020	Review Tech Working Group barriers		0.50				0.50	0.00	0.50
8/19/2020	Review Upstream lighting promotions and tracking tool	0.50					0.50	0.00	0.50
8/21/2020	1.5 hr Call with Grid on the C&I Annual Plan, 1 hr Call with National Grid about lighting, .25 hr prep for call	1.00	1.75				2.75	0.00	2.75
							0.00	0.00	0.00
	Total hours	3.00	2.25	0.00	0.00	0.00	6.25	0.00	6.25
	Total Amount	\$70.00	\$16.25	\$0.00	\$0.00	\$0.00	\$1,156.25	0.00	\$1,156.25

Margie Lynch/Core Energy Insights, Inc.
111 Hooksett Road, Auburn, NH 03032

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 8-2020*
Invoice Date: *August 31, 2020*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services	Amount
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Services Performed 08/01/2020 through 08/30/2020

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	7.25	\$176.00	\$1,276.00

TOTAL DUE

\$1,276.00

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
8/4/20	Reviewed responses to information requests		0.50				0.50	0.00	0.50
8/5/2020	Discussed equity strategies for 2021-2023 plan		1.00				1.00	0.00	1.00
8/6/2020	Participated in monthly res sector meeting		2.00				2.00	0.00	2.00
8/17/2020	Prepared for and participated in planning meeting		1.75				1.75	0.00	1.75
8/18/2020	Participated in planning meeting		1.50				1.50	0.00	1.50
8/28/2020	Reviewed July data and prepared questions		0.50				0.50	0.00	0.50
							0.00	0.00	0.00
	Total hours	0.00	7.25	0.00	0.00	0.00	7.25	0.00	7.25
	Total Amount	\$0.00	\$1,276.00	\$0.00	\$0.00	\$0.00	\$1,276.00	0.00	\$1,276.00

Energy Futures Group, Inc.

PO Box 587
 Hinesburg, VT 05461
 Phone: (802) 482-5001
 Fax: (802) 329-2143



Invoice

TO: Optimal Energy Inc.
 April Clodgo
 10600 Route 116, Suite 3
 Hinesburg, VT 05461
 clodgo@optenergy.com

Invoice #:4205
 Invoice Date: 9/8/2020
 Invoice Period: 8/1/2020-8/31/2020
 Job Name: RI EERMC
 Terms: Net 30 Days
 PO # 3200362251

Consultant Labor	Job-Phase-Project	Project Description	Rate	Hours	Amount
Dan Mellinger	4104-00-02	Cyclical Planning & Reporting Activities	\$185.00	10.75	\$1,988.75
Glenn Reed	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	21.00	\$4,095.00
Richard Faesy	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	8.50	\$1,657.50
EFG Labor Subtotal:				40.25	\$7,741.25

TOTAL DUE THIS INVOICE: \$7,741.25 USD

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4205
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 8/1/2020-8/31/2020
Consultant: Dan Mellinger

Date	Phase-Project	Project Description	Hours Task Description
8/11/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Check-in with Ben Rivers re: lighting data
8/12/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Upstream lighting data analysis; prep meeting agenda; C&I lighting meeting with NGrid
8/13/2020	00-02	Cyclical Planning & Reporting Activities	2.00 Notes from lighting meeting; RI email updates and review; upstream data dashboard
8/14/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review upstream promo info from Travis
8/19/2020	00-02	Cyclical Planning & Reporting Activities	1.75 Prep for RI lighting meeting
8/21/2020	00-02	Cyclical Planning & Reporting Activities	2.50 RI C&I planning meeting; prep agenda and data for lighting call; lead C&I lighting call with NGrid; send out notes
8/25/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Respond to Travis' question about LLLC savings
8/26/2020	00-02	Cyclical Planning & Reporting Activities	1.00 C&I C-team planning call; review updated BCR-MPS mapping from Adam
8/31/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review info from Adam; RI call scheduling
TOTAL:			10.75

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4205
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 8/1/2020-8/31/2020
Consultant: Glenn Reed

Date	Phase-Project	Project Description	Hours Task Description
8/3/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Lighting one-pager revisions
8/4/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Review and comment on Grid RI H&S barrier data. Review MA activities
8/6/2020	00-02	Cyclical Planning & Reporting Activities	2.25 Monthly RI sector call, prep and follow up
8/10/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review draft Evaluation vendor RFP
8/17/2020	00-02	Cyclical Planning & Reporting Activities	1.75 RI Lighting, HVAC and Products call, prep and review of just released ENERGY STAR shipment data
8/18/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Planning call for IES, MF and RNC
8/20/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Review SF and MF evaluation one-pagers
8/25/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Follow up on review of SF and MF impact reports, review of Ralph's comments on savings results
8/25/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review of lighting sales data analysis report
8/26/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Res. C-Team prep call, prep and follow up (review of Council presentation)
8/26/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Monthly EM&V call, prep and follow up
8/26/2020	00-02	Cyclical Planning & Reporting Activities	2.25 Review of regional lighting sales data analysis report, responses to Carrie's questions
8/27/2020	00-02	Cyclical Planning & Reporting Activities	1.50 July data review
8/28/2020	00-02	Cyclical Planning & Reporting Activities	1.50 2021 Plan review
8/30/2020	00-02	Cyclical Planning & Reporting Activities	2.00 2021 Plan review
8/31/2020	00-02	Cyclical Planning & Reporting Activities	1.75 2021 Plan review
TOTAL:			21.00

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4205
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 8/1/2020-8/31/2020
Consultant: Richard Faesy

Date	Phase-Project	Project Description	Hours Task Description
8/6/2020	00-02	Cyclical Planning & Reporting Activities	2.00 Plan review call with Grid and C-Team
8/7/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Heat pump analysis review/discuss with Calvert and Grid
8/17/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Res planning with C-Team and Grid
8/18/2020	00-02	Cyclical Planning & Reporting Activities	1.75 Prep then RI res planning meeting with Grid etc.
8/21/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Review Cadmus heat pump analysis, comments to Optimal
8/31/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review 2021 Plan with G. Reed
TOTAL:			8.50

Pay to: Jennifer Chiodo
JLC Consulting, LLC
52 Bent Creek Road
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-2020.05*
Invoice Date: *August 31, 2020*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 8/1/2020 through 8/31/2020			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	8.75	\$195.00	\$1,706.25
LABOR - Travel Hours	0.00	\$97.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$1,706.25</u>

LC Consulting, LLC

Services Performed 01/2020 through 03/2020

Jen Chiodo

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
08/06/20	CI Sector team meeting prep, mtg and followup			1.75			1.75	0.00	1.75
08/18/20	Grid barriers review		1.00				1.00	0.00	1.00
08/20/20	Review materials prep for Grid mtg		1.00				1.00	0.00	1.00
08/21/20	National Grid Planning meeting and follow up		2.00				2.00	0.00	2.00
08/26/20	RI Team call and 3 yr planning		2.00				2.00	0.00	2.00
08/31/20	2021 Plan review		1.00				1.00	0.00	1.00
	Total hours	0.00	7.00	1.75	0.00	0.00	1.75	0.00	1.75
	Total Amount	\$0.00	\$1,365.00	\$3,125	\$0.00	\$0.00	\$1,706.25	0.00	\$1,706.25

Ralph Prah
7613 Whitebridge Glen
University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 16
Invoice Date: August 31, 2020
OEI Project #: 7345

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 7/01/20 through 8/31/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	59.75	\$195.00	\$11,651.25
LABOR - Travel Hours	0.00	\$97.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$11,651.25</u>

Ralp Pra
Services performed 07/01/20 through 08/31/20

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
07/01/20	overall studies check-in call; C&I NTG study; Sense instr	2.25					2.25	0.00	2.25
07/02/20	Sense study; CSSI attribution; C&I on-sites one-pager;	0.75					0.75	0.00	0.75
07/03/20	ltg shelf report	0.25					0.25	0.00	0.25
07/05/20	ltg shelf study report rev; C&I NTG sample plan; beh impact report rev	1.25					1.25	0.00	1.25
07/07/20	beh impact report	0.25					0.25	0.00	0.25
07/08/20	CSSI studies	0.25					0.25	0.00	0.25
07/09/20	CEEI issues; res ltg shelf stocking report; beh imp report rev;	0.75					0.75	0.00	0.75
07/13/20	beh impact report; CSSI policy issues; CSSI training permit review report; ltg shelf report	1.00					1.00	0.00	1.00
07/14/20	permit report; res retro studies webinar	3.00					3.00	0.00	3.00
07/16/20	custom impact studies; CSSI	0.50					0.50	0.00	0.50
07/17/20	C&I on-site one-pager; C&I custom impact studies (conf call + prep)	1.50					1.50	0.00	1.50
07/18/20	gas load shape study; custom gas impact study	0.25					0.25	0.00	0.25
07/19/20	C&I custom gas impact site reports; gas load shape study	1.25					1.25	0.00	1.25
07/20/20	custom gas impact; gas peak demand study	0.50					0.50	0.00	0.50
07/21/20	beh rep; gas load shapes study; review new study tracker; prep for res studies mtg; C&I custom gas impact eval (site reports)	2.25					2.25	0.00	2.25
07/22/20	res studies check-in call; e-mail mgmt; res retro impact reports	2.00					2.00	0.00	2.00
07/23/20	codes mtg; res ltg sales data query from Glenn	1.25					1.25	0.00	1.25
07/24/20	custom gas impact eval	0.25					0.25	0.00	0.25
07/25/20	codes impact accounting; gas load shape study; res retro studies impact results memos	2.25					2.25	0.00	2.25
07/26/20	res retro studies results memos	2.00					2.00	0.00	2.00
07/27/20	res retro reports; C&I custom gas impact study; codes issues	1.00					1.00	0.00	1.00
07/28/20	beh report	0.50					0.50	0.00	0.50
07/29/20	heat pump study; C&I custom impact; legislative study; shelf stocking report rev	0.75					0.75	0.00	0.75
07/30/20	codes - CSSI savings	0.50					0.50	0.00	0.50
07/31/20	beh report; CCEI impact accounting issues (two conf calls)	2.75					2.75	0.00	2.75
08/01/20	codes impact accounting issues	0.75					0.75	0.00	0.75
08/03/20	code compliance savings	0.25					0.25	0.00	0.25
08/05/20	overall studies check-in call+ prep	1.50					1.50	0.00	1.50
08/07/20	heat pump study (conf call + prep); leg study (vendor instr); res EM&V RFP; gas load shapes study	2.25					2.25	0.00	2.25
08/09/20	custom gas one-pager; res retro studies final reports	2.00					2.00	0.00	2.00
08/10/20	res retro studies final reports	3.25					3.25	0.00	3.25
08/11/20	res EM&V RFP; legislative study; C&I NTG study	0.25					0.25	0.00	0.25
08/13/20	heat pump study	0.25					0.25	0.00	0.25
08/14/20	retro reports; CSSI impact accounting;	1.25					1.25	0.00	1.25
08/17/20	leg study - conf call + prep	1.25					1.25	0.00	1.25
08/18/20	leg study report	1.00					1.00	0.00	1.00
08/19/20	CSSI - call w/Phil + prep	1.25					1.25	0.00	1.25
08/20/20	codes impact accounting; C&I NTG study; res retrofit impact reports; res ltg sales data report	1.75					1.75	0.00	1.75
08/21/20	res retrofit impact reports	0.50					0.50	0.00	0.50
08/22/20	res retro impact report; heat pump study	0.50					0.50	0.00	0.50
08/23/20	legislative study report	1.50					1.50	0.00	1.50
08/24/20	codes call + follow-up; leg study report;	2.50					2.50	0.00	2.50
08/25/20	retrofit report; leg report; CSSI report rev; py2018 custom gas report; res ltg sales data report;	2.00					2.00	0.00	2.00
08/26/20	custom gas report; res studies check-in call; conf call on codes compliance savings	2.50							2.50
08/27/20	codes mtg; res ltg sales data report	1.75							1.75
08/28/20	Res EM&V RFP; res retrofit studies final reports rev	1.25							1.25
08/31/20	2021 EM&V plan	1.00							1.00
		Total Hours	51.75	0.00	0.00	0.00	51.75	0.00	51.75
		Total Amount	\$11,651.25	\$0.00	\$0.00	\$0.00	\$11,651.25	\$0.00	\$11,651.25

Rachel Sholly
48 Hudson Street
Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 32
Invoice Date: August 31, 2020
OEI Project #: 7345

Work Performed for National Grid USA Service Company

Description of Services	Amount		
Services Performed 08/01/20 through 08/31/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	26.00	\$148.00	\$3,848.00
LABOR - Travel Hours	0.00	\$74.00	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$3,000.00</u>

Raciel Solly

Services Performed 08/01/20 through 08/31/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
8/3/2020	Drafted edu call agenda, sent for review			0.50			0.50		0.50
8/4/2020	Retreat planning, call w/Mike; Optimal workforce strategy call			1.50			1.50		1.50
8/5/2020	Fleshed out retreat framing proposal; Drafted workforce strategy agenda & reviewed relevant docs; Prep & edu call; Equity strategy call w/Mike, Elizabeth & Margie; Call w/Adam to finalize workforce agenda, follow-up communications			5.25			5.25		5.25
8/6/2020	Check-in w/Mike; Workforce strategy scheduling; Edu call notes & follow-up; Retreat scheduling			2.25			2.25		2.25
8/7/2020	Optimal daily scrum & finance check-in; Scheduling workforce & finance mtgs			2.25			2.25		2.25
8/10/2020	Optimal daily scrum			0.50			0.50		0.50
8/11/2020	Finance mtgs scheduling			0.25			0.25		0.25
8/14/2020	TWG mtg (equity & barriers)			1.50			1.50		1.50
8/17/2020	Optimal daily scrum & follow-up; Annual Report communications			0.75			0.75		0.75
8/18/2020	Picked up printed Annual Reports & dropped them at Optimal; Edu call prep			0.75			0.75		0.75
8/19/2020	Finance mtgs scheduling			1.75			1.75		1.75
8/20/2020	Equity call; Workforce call; Finance mtgs scheduling			2.25			2.25		2.25
8/21/2020	Finalized & sent workforce notes; Finance mtg full group & debrief			3.00			3.00		3.00
8/24/2020	Optimal daily scrum			0.50			0.50		0.50
8/26/2020	Sent finance mtgs agendas;			0.25			0.25		0.25
8/27/2020	Public forum planning; Edu call prep			1.00			1.00		1.00
8/31/2020	Edu call prep; Public forum coordination; Optimal daily scrum; Retreat planning w/Mike			1.75			1.75		1.75
	Total hours	0.00	0.00	26.00	0.00	0.00	26.00	0.00	26.00
	Total Amount	\$0.00	\$0.00	\$3,000.00	\$0.00	\$0.00	\$3,000.00	\$0.00	\$3,000.00



102 Waterman Street
 Providence, RI 02906
 P 401.421.5160
 F 401.272.0686
 www.allegraprovidence.com
 print@allegraprovidence.

Invoice	
No: 92761	Date: 08/17/20

Rachel Sholly
RI Energy Efficiency & Resource Management Council
RI Office of Energy Resources
One Capitol Hill
Providence, RI 02908

Acct.No	Ordered by	Phone	P.O. No	Prepared by	Sales Rep	Ship By
2023	Rachel Sholly	401-580-2901		Catherine		Pickup
Quantity	Description					Price
100	Annual Report <hr/> Annual Report Copy Paper: 80# Blazer Text Satin 11 x 8.5 Front: Color Back: Color Digital: Color Laser 17" Cut: To FinSz (5 Cuts/Sheet) Bind: BookMaker <10 Cover Copy Paper: 80# Blazer Cover Gloss 11 x 8.5 Front: Color Back: Color Digital: Color Laser 17" Cut: To FinSz (5 Cuts/Sheet) Bind: BookMaker <10 <i>Thank you for the order.</i>					956.21 Subtotal 956.21 Tax 0.00 TOTAL 956.21 Paid 0.00 BALANCE 956.21 Terms Net 15 Days
Received by _____ Date _____						

Pay from this invoice

Allegra Marketing | Print | Mail · 102 Waterman Street · Providence RI 02906 · (401) 421-5160

(print# 3)

Invoice



September 30, 2020
Project No: 7345
Invoice No: 7066

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2020
PO #:

Professional Services from September 1, 2020 to September 30, 2020

Phase 001 Policy & Strategy

Optimal Staff

	Hours	Rate	Amount	
Belliveau, Eric	24.00	195.00	4,680.00	
Guerard, Michael	31.75	195.00	6,191.25	
Jacobs, Adam	.50	185.00	92.50	
Mosenthal, Philip	2.75	195.00	536.25	
Ross, Samuel	26.50	185.00	4,902.50	
Socks, Matthew	16.50	185.00	3,052.50	
Totals	102.00		19,455.00	
Total Labor				19,455.00

Subcontractors

Rachel Sholly			3,848.00	
Total Subcontractors			3,848.00	3,848.00

Total this Phase \$23,303.00

Phase 002 Cyclical Planning & Reporting

Optimal Staff

	Hours	Rate	Amount
Caesar, Adrian	21.00	130.00	2,730.00
Guerard, Michael	46.25	195.00	9,018.75
Jacobs, Adam	26.25	185.00	4,856.25

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020		Invoice	7066
	Johnson, Craig	91.50	150.00	13,725.00	
	Ross, Samuel	110.00	185.00	20,350.00	
	Schuur, Arah	5.00	195.00	975.00	
	Totals	300.00		51,655.00	
	Total Labor				51,655.00

Subcontractors

Core Energy Insights Inc.	1,188.00
Caerbannog Consulting, LLC	1,572.50
Energy Futures Group, Inc.	7,372.50
Total Subcontractors	10,133.00

Total this Phase \$61,788.00

Phase 003 EERMC Oversight - EMV

Optimal Staff

	Hours	Rate	Amount	
Guerard, Michael	2.75	195.00	536.25	
Jacobs, Adam	6.00	185.00	1,110.00	
Johnson, Craig	11.25	150.00	1,687.50	
Mosenthal, Philip	12.00	195.00	2,340.00	
Totals	32.00		5,673.75	
Total Labor				5,673.75

Subcontractors

Jennifer Chiodo	3,461.25
Total Subcontractors	3,461.25

Total this Phase \$9,135.00

Phase 004 EERMC Oversight - Education/Stakeholders

Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	12.75	130.00	1,657.50	
Guerard, Michael	24.00	195.00	4,680.00	
Totals	36.75		6,337.50	
Total Labor				6,337.50

Total this Phase \$6,337.50

Phase 005 Intern

Fixed Fees

Monthly Intern Fee (September 2020)	2,272.73
Total Fixed Fees	2,272.73

Total this Phase \$2,272.73

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Project	7345	Rhode Island EERMC - 2020	Invoice	7066
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Billing Limits	Current	Prior	To-Date	
Total Billings	102,836.23	637,257.11	740,093.34	
Limit			945,000.00	
Remaining			204,906.66	
		Total this Invoice		\$102,836.23

Billings to Date

	Current	Prior	Total
Labor	83,121.25	476,646.25	559,767.50
Subcontractor	17,442.25	142,101.75	159,544.00
Expense	0.00	2,600.00	2,600.00
Add-on	2,272.73	15,909.11	18,181.84
Totals	102,836.23	637,257.11	740,093.34

Project 7345 Rhode Island EERMC - 2020 Invoice 7066

Billing Backup

Tuesday, October 13, 2020

Optimal Energy Inc.

Invoice 7066 Dated 9/30/2020

10:09:39 AM

Phase 001 Policy & Strategy

Optimal Staff

			Hours	Rate	Amount
Belliveau, Eric	9/4/2020		1.50	195.00	292.50
		PIMs call, disc with MG on thresholds, review doc and comment			
Belliveau, Eric	9/8/2020		1.25	195.00	243.75
		research on comparisons for goal setting			
Belliveau, Eric	9/9/2020		2.00	195.00	390.00
		team meeting on RI strategy, disc with MG, review team EE comments doc			
Belliveau, Eric	9/10/2020		.50	195.00	97.50
		call with T Wolfe, NDA process			
Belliveau, Eric	9/11/2020		.50	195.00	97.50
		tech session listened to all charged for 1/2 hour			
Belliveau, Eric	9/15/2020		1.25	195.00	243.75
		3YP discussion			
Belliveau, Eric	9/16/2020		1.25	195.00	243.75
		call with BT and MG on PIM planning and goal setting. analysis on payout rate application			
Belliveau, Eric	9/18/2020		1.50	195.00	292.50
		retreat prep calls, review PIM slides and codes, PIM application for payout rate			
Belliveau, Eric	9/21/2020		4.00	195.00	780.00
		attend EERMC retreat, present on PIM, 3YP plan update meeting-internal			
Belliveau, Eric	9/22/2020		4.50	195.00	877.50
		3YP call, pim call prep, pim call, develop spreadsheet on payout rates, verify data, discuss same with MG			
Belliveau, Eric	9/23/2020		2.00	195.00	390.00
		PIMS meeting and goal setting, prep with team on payout rates			
Belliveau, Eric	9/24/2020		1.00	195.00	195.00
		disc with SR on PIMS trajectories and static slope examples			
Belliveau, Eric	9/25/2020		2.25	195.00	438.75
		PIMs team prep, pool setting call			
Belliveau, Eric	9/29/2020		.50	195.00	97.50
		review Div agreement on PIMS and goals, disc with MG, reply			
Guerard, Michael	9/1/2020		2.75	195.00	536.25
		Follow-up on LCP legislation data request; PIM planning			
Guerard, Michael	9/2/2020		1.25	195.00	243.75
		Report to OER on PUC Open meeting on CHP; PIMs - review Division comments, coord. w EB on reposnse			
Guerard, Michael	9/4/2020		1.25	195.00	243.75
		C-E report development w SR; Review main text of 2021 plan			
Guerard, Michael	9/9/2020		4.75	195.00	926.25
		Annual Plan review; call w OER; sector team coord			

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Page 4

Project	7345	Rhode Island EERMC - 2020			Invoice	7066
Guerard, Michael		9/10/2020	2.25	195.00		438.75
		PIMs -comment and feedback sent; EERMC mtg prep				
Guerard, Michael		9/11/2020	5.25	195.00		1,023.75
		EE TWG, prep and debriefs; EERMC mtg materials prep				
Guerard, Michael		9/14/2020	2.00	195.00		390.00
		EERMC mtg materials prep				
Guerard, Michael		9/15/2020	2.50	195.00		487.50
		Plan negotiations; EERMC mtg prep				
Guerard, Michael		9/16/2020	2.00	195.00		390.00
		Chk-in call w OER on LCP law data; EERMC mtg prep; AESC update				
Guerard, Michael		9/17/2020	6.00	195.00		1,170.00
		Chk-in call w OER/Div; EERMC mtg, prep and debriefs				
Guerard, Michael		9/18/2020	.75	195.00		146.25
		EERMC debriefs, follow-up tasks				
Guerard, Michael		9/23/2020	1.00	195.00		195.00
		Chk-in mtg w OER, Div				
Jacobs, Adam		9/1/2020	.25	185.00		46.25
		-review July RI C&I data report				
Jacobs, Adam		9/29/2020	.25	185.00		46.25
		-check-in w/ Craig and Mike on monthly sector team calls				
Mosenthal, Philip		9/4/2020	1.50	195.00		292.50
		PIMS conf., C&S				
Mosenthal, Philip		9/22/2020	1.00	195.00		195.00
		ph. and analysis re PIMS				
Mosenthal, Philip		9/23/2020	.25	195.00		48.75
		PIMS disc.				
Ross, Samuel		9/14/2020	1.75	185.00		323.75
		Dunsky NH MPS review; esp. COVID sensitivity				
Ross, Samuel		9/18/2020	.50	185.00		92.50
		Prep for; cancelation of OBR Mkt Validation mtg (Ben Rivers out sick)				
Ross, Samuel		9/22/2020	1.00	185.00		185.00
		OER / CTeam PIM Call, prep & follow up re: same				
Ross, Samuel		9/23/2020	3.25	185.00		601.25
		Internal analysis, disc re: PIMs, group call re: same, follow up disc.				
Ross, Samuel		9/24/2020	1.75	185.00		323.75
		Assembling options for PIM in graphical form; quick review of Acquidneck Report				
Ross, Samuel		9/25/2020	4.25	185.00		786.25
		PIM meeting, prep & follow-up re:same; Gas DR mtg, prep and follow up re: same				
Ross, Samuel		9/27/2020	1.00	185.00		185.00
		Dunsky Feedback form; planning re: how to submit				
Ross, Samuel		9/28/2020	3.75	185.00		693.75
		Disc. re: methodology for adjusting MPS results for EM&V; planning for rest of week deliverables; review, comments re: updated 3YP savings justification				
Ross, Samuel		9/29/2020	5.50	185.00		1,017.50
		kick off meeting re: Oct 8th slides, initial work re: same; updated SRP PIM documentation; gas R&B model initial review & emailing re:same				
Ross, Samuel		9/30/2020	3.75	185.00		693.75

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Project	7345	Rhode Island EERMC - 2020		Invoice	7066
		Gas Rate and Bill Impacts; planning for final draft review			
Socks, Matthew		9/2/2020	2.50	185.00	462.50
		Discuss initial comments on AESC Draft Deliverable #1 w/ B.Trietch et. al.; Reviewing AESC Draft Deliverable #1 in preparation for Study Group call			
Socks, Matthew		9/3/2020	1.00	185.00	185.00
		Reviewing AESC Draft Deliverable #1 in preparation for Study Group call			
Socks, Matthew		9/4/2020	1.25	185.00	231.25
		Drafting/distributing draft comments on AESC Draft Deliverable #1 to B.Trietch et al.			
Socks, Matthew		9/8/2020	1.00	185.00	185.00
		Performing detailed review of AESC Draft Deliverable #1 and cited materials for written comments			
Socks, Matthew		9/9/2020	2.75	185.00	508.75
		Drafting/sending final comments on AESC Draft Deliverable #1 to Synapse.			
Socks, Matthew		9/10/2020	1.25	185.00	231.25
		Reviewing RI RE and climate action plans/alternatives for AESC 2021			
Socks, Matthew		9/16/2020	1.00	185.00	185.00
		Discuss comments on AESC Second Draft Deliverable #1 w/ B.Trietch et. al.			
Socks, Matthew		9/24/2020	1.75	185.00	323.75
		Reviewing AESC 2021 Draft Deliverable #2 in preparation for Study Group call; Summarizing/sending initial comments to B.Trietch et al.			
Socks, Matthew		9/25/2020	.75	185.00	138.75
		Researching marginal abatement cost methodologies for AESC 2021 Draft Deliverable #2 review.			
Socks, Matthew		9/30/2020	3.25	185.00	601.25
		Drafting/submitting questions to Synapse on Draft Deliverable #2.			
		Totals	102.00		19,455.00
		Total Labor			19,455.00
				Total this Phase	\$23,303.00

Phase 002 Cyclical Planning & Reporting

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian		9/1/2020	2.00	130.00	260.00
		C&I July Data report, PUC Open Meeting - Docket 4755 - CHP reimbursement			
Caesar, Adrian		9/2/2020	.75	130.00	97.50
		Res Financing Strategy call - notetaking			
Caesar, Adrian		9/9/2020	5.00	130.00	650.00
		2021 Annual Plan comps to historical plans/actuals/3YP			
Caesar, Adrian		9/10/2020	5.75	130.00	747.50
		2021 Annual Plan comps to historical plans/actuals/3YP, 2021 Annual Plan review, questions, and comments, LCP Standards comment document drafting			
Caesar, Adrian		9/28/2020	3.50	130.00	455.00
		2021 Annual Plan/3YP final draft program level comps - workbook and visual buildout, BC/MPS Mapping tool 3YP/2021 AP final draft prep			

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Project	7345	Rhode Island EERMC - 2020			Invoice	7066
Caesar, Adrian		9/29/2020	1.75	130.00		227.50
		2021 Annual Plan/3YP final draft program level comps - workbook and visual buildout, EERMC October mtg - presentation planning				
Caesar, Adrian		9/30/2020	2.25	130.00		292.50
		2021-2023 3YP/2021 Annual Plan Sector and Program-level Comps - 2nd draft analysis prep				
Guerard, Michael		9/1/2020	1.00	195.00		195.00
		C&I planning mtg				
Guerard, Michael		9/2/2020	4.75	195.00		926.25
		Rez and C&I sector team chk-in; Rez fuiance review call; debrief of rez labelling				
Guerard, Michael		9/3/2020	5.50	195.00		1,072.50
		Monthly rez and C&I sector calls w Grid, OER, prep and debriefs; chk-in call w OER on 2021 sbc; Bldg labelling follow-up				
Guerard, Michael		9/4/2020	5.25	195.00		1,023.75
		Review 2021 1st draft; team update on PIMs; call w RIIB				
Guerard, Michael		9/8/2020	2.00	195.00		390.00
		C&S updates; coord SRP NDA; Q2 data review				
Guerard, Michael		9/10/2020	5.00	195.00		975.00
		Plan review, comments; Team coord and updates; AESC, MF tax credits, RIIB and bill impact debriefs with team				
Guerard, Michael		9/11/2020	1.25	195.00		243.75
		Plan follow-up, set up negotiation meetings w Grid				
Guerard, Michael		9/14/2020	3.25	195.00		633.75
		Plan review/discussions, review NH study, COVID impacts; codes coord.				
Guerard, Michael		9/16/2020	1.75	195.00		341.25
		Plan updates, call w Grid/OER				
Guerard, Michael		9/21/2020	2.00	195.00		390.00
		Prep for rez and C&I sector mtgs				
Guerard, Michael		9/22/2020	2.75	195.00		536.25
		Debrief on codes w OER, follow-up w PM; review Plan issues, next steps				
Guerard, Michael		9/23/2020	3.50	195.00		682.50
		C&I planning mtg; PIMs negotiation mtg w Grid/OER/Div, prep				
Guerard, Michael		9/25/2020	3.00	195.00		585.00
		SRP updates; debriefs and coord next steps on EE plan				
Guerard, Michael		9/28/2020	3.75	195.00		731.25
		Review and discussions on final Plan issues				
Guerard, Michael		9/30/2020	1.50	195.00		292.50
		Ongoing resolution of Plan issues				
Jacobs, Adam		9/1/2020	1.00	185.00		185.00
		-C&I internal plan review check-in + prep for upcoming C&I sector team and planning meetings				
Jacobs, Adam		9/2/2020	.75	185.00		138.75
		-3YP/Annual Plan Process/Timeline Check-in				
Jacobs, Adam		9/3/2020	2.00	185.00		370.00
		-RI C&I Sector team call -C&I finance check-in w/ Sam				
Jacobs, Adam		9/4/2020	.25	185.00		46.25
		-2021 annual plan review coordination				
Jacobs, Adam		9/8/2020	1.25	185.00		231.25

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020		Invoice	7066
		-RI daily scrum, planning timeline review -email to Mona on Final C&I 3YP focused meeting for week of Sept 21st -subcontractor plan review/2020 time allocation review -follow-up w/ Ben on 2021 plan comments -agenda for RI C&I planning meeting			
Jacobs, Adam		9/9/2020	6.00	185.00	1,110.00
		-C&I Review of comments on 1st draft of Annual Plan + prep -Strategy discussion on 3YP/2021 Plan Barriers/Savings -Consolidate Sector Team Comments -BCR cost of savings analysis			
Jacobs, Adam		9/10/2020	1.25	185.00	231.25
		-gas BCR cost analysis and questions for 2021 plan -benefits/PI check-in -coordinate final comments			
Jacobs, Adam		9/11/2020	.50	185.00	92.50
		-marginal acquisition cost of savings -send out doodle poll for RI C&I Planning Meeting			
Jacobs, Adam		9/14/2020	.25	185.00	46.25
		-1/2 RI Daily scrum - retreat and planning			
Jacobs, Adam		9/15/2020	1.50	185.00	277.50
		-schedule final C&I planning meeting -scrum check-in on BC/MPS mapping for final plan compared to draft plan -Sector Team Planning Mtg Sync Up -draft C&I sector team planning agenda -outline C&I sector team content for council retreat			
Jacobs, Adam		9/16/2020	1.75	185.00	323.75
		-C&I sector team planning meeting agenda finalizing/sending -councilor retreat C&I presentation draft -DR Final Draft 2021 scheduling call w/ OER/Grid			
Jacobs, Adam		9/17/2020	.50	185.00	92.50
		-DR in RI - Final draft 2021 (call w/ Grid)			
Jacobs, Adam		9/18/2020	.75	185.00	138.75
		-RI EERMC retreat dry run			
Jacobs, Adam		9/21/2020	3.00	185.00	555.00
		-RI EERMC councilor retreat -check-in on C&I savings goals, NTG impacts and COVID impacts			
Jacobs, Adam		9/22/2020	.75	185.00	138.75
		-RI daily scrum updated NTG factors -cross sector team check-in w/ Craig			
Jacobs, Adam		9/23/2020	2.25	185.00	416.25
		-follow-up on C&I EM&V adjustments to 3YP and targets -RI C&I planning call			
Jacobs, Adam		9/24/2020	1.00	185.00	185.00
		-1/2 RI Daily scrum (planning focus) -review notes from C&I planning calls -Summarizing Planning Meeting recommendations and commitments in appendix for council plan vote			
Jacobs, Adam		9/28/2020	.50	185.00	92.50
		-follow-ups on M&V Adjustments to Mid Potential - Methodology Discussion -1/2 RI daily scrum (planning tasks)			
Jacobs, Adam		9/29/2020	.75	185.00	138.75

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Project	7345	Rhode Island EERMC - 2020			Invoice	7066
		-RI council meeting slides check-in -discuss summarizing all 3YP planning meetings for council vote				
Jacobs, Adam		9/30/2020	.25	185.00		46.25
		-1/2 RI daily scrum -subcontractor plan review coordination				
Johnson, Craig		9/1/2020	6.00	150.00		900.00
		LCP Data request research and analysis. Review timeline and strategy discussion on annual/3YPs. Develop program level comps for 2021 Annual Plan. Review narrative and numbers associated with residential programs in 2021 annual plan. Prep for residential sector team meeting.				
Johnson, Craig		9/2/2020	6.50	150.00		975.00
		Review narrative and numbers associated with residential programs in 2021 annual plan. Prep for res sector team meeting w/ internal res team. Prep planning next steps for sector teams w/ Adam and Mike. Residential fiance planning meeting.				
Johnson, Craig		9/3/2020	7.50	150.00		1,125.00
		Monthly residential sector team meeting, meeting prep and debrief. Review narrative and numbers associated with residential programs in 2021 annual plan.				
Johnson, Craig		9/4/2020	2.00	150.00		300.00
		Review narrative and numbers associated with residential programs in 2021 annual plan. Reschedule Res October meeting. Send out request for availability for next residential planning meetings.				
Johnson, Craig		9/8/2020	4.00	150.00		600.00
		Review narrative and numbers associated with residential programs in 2021 annual plan.				
Johnson, Craig		9/9/2020	9.50	150.00		1,425.00
		Review narrative and numbers associated with residential programs in 2021 annual plan. Review major changes to measure level costs. Review non-incentive costs for 2021 compared to 2020. Break out lighting savings/spending from recent plans/actuals for assessing cost-to-achieve without lighting. Check-in and work on LCP research and Q2 presentation.				
Johnson, Craig		9/10/2020	9.25	150.00		1,387.50
		Review narrative and numbers associated with residential programs in 2021 annual plan. Check-in w/ Mike on LCP analysis updates. Compile comments on residential, main text, EM&V, and pilots narratives. Compile c-team comments on BC model. Respond to Division's question re: cost to achieve in residential portfolio for 2021 vs 2020.				
Johnson, Craig		9/11/2020	5.50	150.00		825.00
		EE TWG Meeting. Develop slide content for Q2 presentation. Develop TWG update memo for Council.				
Johnson, Craig		9/14/2020	3.75	150.00		562.50
		Review/discuss needs for Council meeting, Council retreat, and sector planning meetings w/ Mike. Develop content for TWG update memo to Council. Develop content for Q2 presentation to Council.				
Johnson, Craig		9/15/2020	5.50	150.00		825.00
		Develop slide content for Q2 presentation. Prep for Council retreat and sector team meetings next week.				
Johnson, Craig		9/16/2020	4.00	150.00		600.00
		Review/discuss program costs w/ NGrid team. Review heating electrification market assessment and identify/discuss potential impacts on savings.				
Johnson, Craig		9/17/2020	6.50	150.00		975.00

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Project	7345	Rhode Island EERMC - 2020	Invoice	7066
		C-Team/OER/Division check-in. Prep for Council meeting and Council retreat. Council meeting.		
Johnson, Craig	9/18/2020	7.50	150.00	1,125.00
		Develop content for Council retreat. Prep for retreat with team.		
Johnson, Craig	9/19/2020	2.25	150.00	337.50
		Develop content and prep for Council retreat.		
Johnson, Craig	9/21/2020	3.00	150.00	450.00
		Council retreat.		
Johnson, Craig	9/22/2020	3.25	150.00	487.50
		RI Res planning meeting and meeting prep.		
Johnson, Craig	9/23/2020	3.00	150.00	450.00
		Review PIMs analysis. Update analysis w/ actuals from BC model and duplicate analysis for gas.		
Johnson, Craig	9/24/2020	.50	150.00	75.00
		Prep for final draft plan review w/ Mike, Adam, and Sam.		
Johnson, Craig	9/30/2020	2.00	150.00	300.00
		Prep for final draft plan review. LCP research - review incentive spending by town data from National Grid, emails about the same.		
Ross, Samuel	9/2/2020	3.50	185.00	647.50
		Annual Plan review re: MPS costs & Max Ach logic; Res Financing call, prep & follow up		
Ross, Samuel	9/3/2020	2.50	185.00	462.50
		following up on Res and C&I Finance calls; initial prep for 9/4 calls		
Ross, Samuel	9/4/2020	6.00	185.00	1,110.00
		RIIB Finance Catch Up; Market Research Finance chat w/Ben Rivers; PIMs cross-context discussion; Cost-Effectiveness Memo initial mtg		
Ross, Samuel	9/7/2020	6.00	185.00	1,110.00
		Begin Plan Text review; planning re: analytical review; initial review of BC models		
Ross, Samuel	9/8/2020	7.75	185.00	1,433.75
		BC model review for accuracy - CE report; Cost as a barrier memo review; internal comments and disc; continued text review		
Ross, Samuel	9/9/2020	14.25	185.00	2,636.25
		Annual Plan review & Analysis: Finalize C-Team comments on 3YP Savings Justification; further text read through; LCP analysis check in; tax credits and MF participation call; C-Team call; finance comments initial work		
Ross, Samuel	9/10/2020	10.25	185.00	1,896.25
		2021 Annual Plan Comments: Final review and assembly of finance comments in-line; final check on analytical comparisons for comments; mtgs to review and ensure all comments centralized, final review, packaging, and submission of all C-Team comments; C-Team check in		
Ross, Samuel	9/11/2020	6.25	185.00	1,156.25
		EE TWG, prep re: same; Draft CE Memo; initial work on Council mtg slides		
Ross, Samuel	9/14/2020	4.75	185.00	878.75
		CE Slide Deck, draft memo finalization; SRP updates for memo		
Ross, Samuel	9/15/2020	3.25	185.00	601.25
		3YP targets call, prep & follow up		
Ross, Samuel	9/16/2020	5.25	185.00	971.25
		Detailed Cost Data discussion; 3YP Targets mtg, prep re: same; annual plan slides for council mtg		

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Project	7345	Rhode Island EERMC - 2020			Invoice	7066
Ross, Samuel		9/17/2020	5.25	185.00		971.25
		C-Team Check in; EERMC Sept Mtg, prep re: same; DR mtg, prep re: same				
Ross, Samuel		9/18/2020	8.00	185.00		1,480.00
		EERMC Retreat Finish draft slides, dry run, continued slide dev; building out Appendices; review of full slide deck; assemble final to do's for weekend work				
Ross, Samuel		9/20/2020	3.50	185.00		647.50
		Finalizing retreat presentation; cleaning formatting and consistency of slides for entire team				
Ross, Samuel		9/21/2020	6.50	185.00		1,202.50
		Retreat; 3YP Targets call, prep & follow up re: same incl. internal discussion, further review of plans, MPS results, BC models				
Ross, Samuel		9/22/2020	6.25	185.00		1,156.25
		Initial review of SRP 3YP 2nd Draft, esp. Grid responses to C-Team comments; Res planning call; 3YP Targets call, prep & follow up re: same				
Ross, Samuel		9/23/2020	3.25	185.00		601.25
		SRP TWG; prep call re: same; Res EM&V call				
Ross, Samuel		9/24/2020	5.50	185.00		1,017.50
		Full Read through of SRP Plan, mtg re: initial comment plan; disc. re: best way to provide documentation of C-Team feedback on plans to Council				
Ross, Samuel		9/25/2020	2.00	185.00		370.00
		SRP 3YP 2nd Draft C-Team comments finalized and submitted				
Schuur, Arah		9/8/2020	1.00	195.00		195.00
		EERMC retreat planning				
Schuur, Arah		9/9/2020	1.00	195.00		195.00
		Call with Sholly and Mike				
Schuur, Arah		9/11/2020	.50	195.00		97.50
		EERMC retreat planning				
Schuur, Arah		9/14/2020	1.50	195.00		292.50
		EERMC retreat planning				
Schuur, Arah		9/16/2020	1.00	195.00		195.00
		RI retreat planning				
		Totals	300.00			51,655.00
		Total Labor				51,655.00
					Total this Phase	\$61,788.00

Phase 003 EERMC Oversight - EMV

Optimal Staff

			Hours	Rate	Amount
Guerard, Michael		9/8/2020	.75	195.00	146.25
		Review status of ongoing studies			
Guerard, Michael		9/23/2020	1.00	195.00	195.00
		Rez EMV monthly chk-in call			
Guerard, Michael		9/25/2020	1.00	195.00	195.00
		Follow-up w Grid on jobs study; updates on NTG C&I results			
Jacobs, Adam		9/2/2020	1.25	185.00	231.25
		-RI C&I EM&V Monthly Check In (C-Team and Grid Team)			

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Project	7345	Rhode Island EERMC - 2020			Invoice	7066
Jacobs, Adam		9/9/2020	.75	185.00		138.75
		-review Strategic Electrification of Heating Market Assessment -C&I NTG/FRSO follow-ups				
Jacobs, Adam		9/11/2020	.50	185.00		92.50
		-RI C&I FRSO Study Discussion				
Jacobs, Adam		9/14/2020	.50	185.00		92.50
		-RI Strategic Electrification study material review				
Jacobs, Adam		9/16/2020	.75	185.00		138.75
		-RI strategic electrification study finalization				
Jacobs, Adam		9/18/2020	1.75	185.00		323.75
		-RI C&I NTG results review + call -follow-ups on aggregating NTG results				
Jacobs, Adam		9/21/2020	.25	185.00		46.25
		-review final RI PY2018 Custom Gas Evaluation Memo				
Jacobs, Adam		9/23/2020	.25	185.00		46.25
		-C&I NTG/FR study				
Johnson, Craig		9/1/2020	.50	150.00		75.00
		Monitor e-mail traffic and review comments on regional lighting study.				
Johnson, Craig		9/2/2020	1.50	150.00		225.00
		Monthly C&I EM&V call. Review final reports of studies on Council website, emails about the same.				
Johnson, Craig		9/4/2020	2.50	150.00		375.00
		Update C&I monthly meeting invite. Respond to C&I EM&V group on next steps regarding FRSO study. Review list of unposted EM&V studies and one-pagers from Erin/Romillee and work w/ Adrian to get them posted on Council site. Review EM&V section of 2021 Annual Plan.				
Johnson, Craig		9/9/2020	.50	150.00		75.00
		Schedule C&I FRSO discussion meeting.				
Johnson, Craig		9/14/2020	1.25	150.00		187.50
		Review final results of strategic electrification of heating market assessment.				
Johnson, Craig		9/15/2020	.50	150.00		75.00
		Review and comment on final results of strategic electrification of heating market assessment.				
Johnson, Craig		9/17/2020	.50	150.00		75.00
		Review Task 3 interviews memo for legislated study.				
Johnson, Craig		9/18/2020	2.00	150.00		300.00
		Review results of C&I FRSO study; call w/ C-Team, NGrid and vendor to discuss results and process for incorporation into BC Models.				
Johnson, Craig		9/23/2020	1.00	150.00		150.00
		Monthly Res EM&V call and call prep. Monitor e-mail traffic on incorporation/final results of C&I FRSO study.				
Johnson, Craig		9/30/2020	1.00	150.00		150.00
		Regional lightin sales data discussion.				
Mosenthal, Philip		9/8/2020	.50	195.00		97.50
		C&S emails r savings attribution				
Mosenthal, Philip		9/9/2020	3.50	195.00		682.50
		work on code and standards PIMS, ph. RP, MG, KR re same				
Mosenthal, Philip		9/10/2020	2.00	195.00		390.00
		work on CCEI EMV				

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Project	7345	Rhode Island EERMC - 2020			Invoice	7066
Mosenthal, Philip		9/11/2020	2.50	195.00	487.50	
		CCEI emails re emv, ph. KP, ph. RP, res. Grid plans				
Mosenthal, Philip		9/14/2020	1.75	195.00	341.25	
		codes conf., ph BT re same				
Mosenthal, Philip		9/18/2020	.75	195.00	146.25	
		rev/comment on Grid codes emv doc, emails re same				
Mosenthal, Philip		9/21/2020	.25	195.00	48.75	
		codes emv comments, emails re same				
Mosenthal, Philip		9/29/2020	.75	195.00	146.25	
		ph MG re plans, C&S emv, potential and goals				
		Totals	32.00		5,673.75	
		Total Labor				5,673.75
						Total this Phase
						\$9,135.00

Phase 004 EERMC Oversight - Education/Stakeholders

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian		9/1/2020	.75	130.00	97.50
		EERMC site updates - Resources/EM&V Studies			
Caesar, Adrian		9/4/2020	1.25	130.00	162.50
		EERMC Website - EM&V studies upload and backfill			
Caesar, Adrian		9/11/2020	4.00	130.00	520.00
		Q2 Electric and Gas Results Slide Deck drafting			
Caesar, Adrian		9/14/2020	3.75	130.00	487.50
		Q2 Results slide deck for Sep. EERMC mtg, 2021-2023 3YP/2021 AP LCP/Council Priorities compliance tracker, Sep EERMC mtg materials upload			
Caesar, Adrian		9/15/2020	1.75	130.00	227.50
		2021-2023 3YP and 2021 Annual Plan LCP/EERMC priorities compliance documentation, Q2 Grid report/presentation QA/QC			
Caesar, Adrian		9/16/2020	.75	130.00	97.50
		EERMC site updates abd Sep mtg materials upload			
Caesar, Adrian		9/17/2020	.50	130.00	65.00
		EERMC Sept. Mtg materials upload, Special meeting and meeting materials upload			
Guerard, Michael		9/1/2020	.50	195.00	97.50
		Review Retreat options			
Guerard, Michael		9/2/2020	1.50	195.00	292.50
		Education subcommittee call; retreat planning w RS			
Guerard, Michael		9/4/2020	.75	195.00	146.25
		Retreat planning w RS			
Guerard, Michael		9/8/2020	1.75	195.00	341.25
		Retreat planning call; Website content review			
Guerard, Michael		9/9/2020	1.75	195.00	341.25
		Respond to stakeholder query on incentives - GECA; retreat planning			
Guerard, Michael		9/10/2020	.75	195.00	146.25
		Retreat prep; updates on website, KV request			

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Project	7345	Rhode Island EERMC - 2020			Invoice	7066
Guerard, Michael		9/14/2020	1.75	195.00	341.25	
	Retreat prep					
Guerard, Michael		9/15/2020	2.25	195.00	438.75	
	Education subcommittee call prep; Retreat prep					
Guerard, Michael		9/16/2020	3.00	195.00	585.00	
	Retreat prep; Education call debrief					
Guerard, Michael		9/18/2020	5.25	195.00	1,023.75	
	Retreat prep					
Guerard, Michael		9/21/2020	4.75	195.00	926.25	
	EERMC Retreat, prep and follow-up					
	Totals		36.75		6,337.50	
	Total Labor					6,337.50
				Total this Phase		\$6,337.50
				Total this Project		\$100,563.50
				Total this Report		\$100,563.50

George Lawrence, Caerbannog Consulting
3540 Mountain Rd
Addison VT 05491

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 30
Invoice Date: September 30, 2020
OEI Project #: 7345

Work Performed for Rhode Island EERMC

Description of Services	Amount
-------------------------	--------

Services Performed 09/01/20 through 09/30/20

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	8.50	\$185.00	\$1,572.50
LABOR - Travel Hours	0.00	\$92.50	\$0.00

(See attached for breakdown by EERMC Team/Task and description of services.)

Travel Expenses \$0.00
(See attached travel expense form for details.)

TOTAL DUE \$1,572.50

Margie Lynch/Core Energy Insights, Inc.
111 Hooksett Road, Auburn, NH 03032

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 9-2020*
Invoice Date: *September 30, 2020*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services	Amount
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Services Performed 09/01/2020 through 09/30/2020

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	6.75	\$176.00	\$1,188.00

TOTAL DUE

\$1,188.00

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Invoice

TO: Optimal Energy Inc.
April Clodgo
10600 Route 116, Suite 3
Hinesburg, VT 05461
clodgo@optenergy.com

Invoice #:4229
Invoice Date: 10/7/2020
Invoice Period: 9/1/2020-9/30/2020
Job Name: RI EERMC
Terms: Net 30 Days
PO # 3200362251

Consultant Labor	Job-Phase-Project	Project Description	Rate	Hours	Amount
Dan Mellinger	4104-00-02	Cyclical Planning & Reporting Activities	\$185.00	13.50	\$2,497.50
Glenn Reed	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	8.50	\$1,657.50
Richard Faesy	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	16.50	\$3,217.50
EFG Labor Subtotal:				38.50	\$7,372.50

TOTAL DUE THIS INVOICE: \$7,372.50 USD

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4229
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 9/1/2020-9/30/2020
Consultant: Dan Mellinger

Date	Phase-Project	Project Description	Hours Task Description
9/1/2020	00-02	Cyclical Planning & Reporting Activities	1.50 C&I planning call; review plan info
9/3/2020	00-02	Cyclical Planning & Reporting Activities	2.00 C&I sector team prep and call
9/8/2020	00-02	Cyclical Planning & Reporting Activities	2.50 Provide comments on 2021 plan 1st draft
9/9/2020	00-02	Cyclical Planning & Reporting Activities	2.00 C-team call with NGrid to review 2021 plan comments
9/10/2020	00-02	Cyclical Planning & Reporting Activities	0.50 RI questions and discussions with Adam
9/17/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Communications with Ben about data, scheduled, lighting topics
9/18/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Review C&I NTG prelim results; call with Adam & team to discuss
9/21/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review updated NTG results and respond to Adam
9/22/2020	00-02	Cyclical Planning & Reporting Activities	0.25 More discussions about NTG study
9/23/2020	00-02	Cyclical Planning & Reporting Activities	2.75 Emails to Adam and Ralph re: NTG study; attend C&I sector meeting
TOTAL:			13.50

Energy Futures Group, Inc.

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Task Description

Invoice #:4229
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 9/1/2020-9/30/2020
Consultant: Glenn Reed

Date	Phase-Project	Project Description	Hours	Task Description
9/2/2020	00-02	Cyclical Planning & Reporting Activities	1.00	Res. Team check-in call
9/3/2020	00-02	Cyclical Planning & Reporting Activities	2.25	RI EE Res. Sector Team meeting, prep and follow up
9/7/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Review and share comments on monthly lighting and appliance data
9/17/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Review of Plan schedule, check-in with Optimal on process, timing and needs
9/21/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Participate in quarterly NEEP codes webinar - time split with MA and CT clients
9/22/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Home Energy Management Systems/Demand Response webinar - time split with CT and MA clients
9/22/2020	00-02	Cyclical Planning & Reporting Activities	2.00	Participate in monthly call w/Grid, prep - review of Grid responses to Consultant comments - and follow up
9/23/2020	00-02	Cyclical Planning & Reporting Activities	1.50	Monthly EM&V call, follow up on DI lighting MLs
9/24/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Request for information on RNC NEIs
9/24/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Follow up on RNC lighting question from OER
9/30/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Participation on regional lighting call w/NMR - billings split w/MA and CT clients
TOTAL:			8.50	

Energy Futures Group, Inc.

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Task Description

Invoice #:4229
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 9/1/2020-9/30/2020
Consultant: Richard Faesy

Date	Phase-Project	Project Description	Hours Task Description
9/1/2020	00-02	Cyclical Planning & Reporting Activities	3.75 Review 2021 plan
9/2/2020	00-02	Cyclical Planning & Reporting Activities	2.00 RI team call, NEEP energy labeling working group (split with CT)
9/3/2020	00-02	Cyclical Planning & Reporting Activities	2.00 2021 plan meeting review with Ngrid team
9/4/2020	00-02	Cyclical Planning & Reporting Activities	1.75 Meeting with Becca re. RI labeling, notes draft and out
9/8/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Plan review/comments
9/14/2020	00-02	Cyclical Planning & Reporting Activities	1.00 RI Energy Labeling with Becca, Angela, etc.
9/15/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Virtual audit demo (split with CT)
9/16/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Cadmus heat pump report review and response, heat pump O&M cost call
9/21/2020	00-02	Cyclical Planning & Reporting Activities	0.50 NEEP Codes Working Group (split with CT)
9/22/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Review plan with Grid, OER, etc.
9/24/2020	00-02	Cyclical Planning & Reporting Activities	1.00 RI Health and EE intersection forum
9/25/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Review labeling language, comments back to Becca
9/29/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Follow up with Optimal re. status of RI plan and scheduling
TOTAL:			16.50

Pay to: Jennifer Chiodo
JLC Consulting, LLC
52 Bent Creek Road
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-2020.06*
Invoice Date: *September 30, 2020*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 09/01/20 through 09/30/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	17.75	\$195.00	\$3,461.25
LABOR - Travel Hours	0.00	\$97.50	\$0.00
(See attached for breakdown by EEAC Team/Task and description of services.)			
Travel Expenses			\$0.00
(See attached travel expense form for details.)			
TOTAL DUE			<u>\$3,61.25</u>

Pay to Jennifer Ciodo

Services Performed 01/20 through 03/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
9/1/20	N Grid 2021 Annual plan review and planning meeting			4.25			4.25	0.00	4.25
9/2/2020	N Grid 2021 Annual plan review and comment			3.75			3.75	0.00	3.75
9/3/2020	Sept Grid meeting and 2021 plan rvw and comment			4.50			4.50	0.00	4.50
9/8/2020	2021 Plan review and comment			2.75			2.75	0.00	2.75
9/18/2020	review NTGR study results and comment			0.50			0.50	0.00	0.50
9/23/2020	C&I Sector meeting with Ngrid - 2021 and 3yp discussions			2.00			2.00	0.00	2.00
							0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
Total hours		0.00	0.00	17.75	0.00	0.00	17.75	0.00	17.75
Total Amount		\$0.00	\$0.00	\$3,61.25	\$0.00	\$0.00	\$3,61.25	0.00	\$3,61.25

Rachel Sholly
48 Hudson Street
Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 33
Invoice Date: *September 30, 2020*
OEI Project #: 7345

Work Performed for National Grid USA Service Company

Description of Services	Amount
Services Performed 09/01/20 through 09/30/20	

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	26.00	\$148.00	\$3,848.00
LABOR - Travel Hours	0.00	\$74.00	\$0.00
(See attached for breakdown by EEAC Team/Task and description of services.)			
Travel Expenses			\$0.00
(See attached travel expense form for details.)			

TOTAL DUE **\$3,000.00**

Rachel Solly

Services Performed 09/01/20 through 09/30/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
9/1/2020	Retreat planning - call w/Becca, follow-up w/Mike, updating agenda	2.00					2.00		2.00
9/4/2020	Retreat planning	1.25					1.25		1.25
9/8/2020	Optimal weekly scrum; Retreat planning; Website communications w/aren	1.75					1.75		1.75
9/9/2020	Call w/aren re: website updates & follow-up; Retreat planning w/Mike & Arah	1.50					1.50		1.50
9/10/2020	Retreat planning; Finalized & sent edu notes; Forum planning	2.25					2.25		2.25
9/14/2020	Drafted member experience discussion guide; Optimal weekly scrum & follow-up; Retreat planning & prep - mtg, agenda, slides	5.75					5.75		5.75
9/15/2020	Retreat planning & prep - mtg, agenda, slides	2.00					2.00		2.00
9/16/2020	Retreat communications & slides; Edu check-in call	1.5					1.50		1.50
9/21/2020	Prep & retreat	4.00					4.00		4.00
9/23/2020	Public Forum prep	1.00					1.00		1.00
9/24/2020	EERMC Public Forum	2.50					2.50		2.50
9/28/2020	Optimal weekly scrum	0.50					0.50		0.50
	Total hours	26.00	0.00	0.00	0.00	0.00	26.00	0.00	26.00
	Total Amount	\$3,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,000.00	\$0.00	\$3,000.00

Invoice



October 31, 2020
Project No: 7345
Invoice No: 7075

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2020
PO #:

Professional Services from October 1, 2020 to October 31, 2020

Phase	001	Policy & Strategy	<hr style="border-top: 1px dashed black;"/>		
Optimal Staff					
			Hours	Rate	Amount
		Belliveau, Eric	1.00	195.00	195.00
		Guerard, Michael	28.50	195.00	5,557.50
		Jacobs, Adam	1.25	185.00	231.25
		Ross, Samuel	18.00	185.00	3,330.00
		Socks, Matthew	16.00	185.00	2,960.00
		Totals	64.75		12,273.75
		Total Labor			12,273.75
Subcontractors					
		Ralph Prah			7,458.75
		Total Subcontractors			7,458.75
				Total this Phase	\$19,732.50

Phase	002	Cyclical Planning & Reporting	<hr style="border-top: 1px dashed black;"/>		
Optimal Staff					
			Hours	Rate	Amount
		Caesar, Adrian	44.50	130.00	5,785.00
		Guerard, Michael	21.75	195.00	4,241.25
		Jacobs, Adam	6.25	185.00	1,156.25
		Johnson, Craig	52.25	150.00	7,837.50

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020		Invoice	7075
	Ross, Samuel		55.25	185.00	10,221.25
	Totals		180.00		29,241.25
	Total Labor				29,241.25

Subcontractors

	Core Energy Insights Inc.				528.00
	Energy Futures Group, Inc.				5,092.50
	Total Subcontractors				5,620.50

Total this Phase **\$34,861.75**

Phase 003 EERMC Oversight - EMV

Optimal Staff

	Hours	Rate	Amount	
Guerard, Michael	3.25	195.00	633.75	
Jacobs, Adam	4.25	185.00	786.25	
Johnson, Craig	10.50	150.00	1,575.00	
Totals	18.00		2,995.00	
Total Labor				2,995.00

Subcontractors

	Rachel Sholly				2,738.00
	Caerbannog Consulting, LLC				370.00
	Jennifer Chiodo				438.75
	Total Subcontractors				3,546.75

Total this Phase **\$6,541.75**

Phase 004 EERMC Oversight - Education/Stakeholders

Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	5.00	130.00	650.00	
Guerard, Michael	1.25	195.00	243.75	
Totals	6.25		893.75	
Total Labor				893.75

Total this Phase **\$893.75**

Phase 005 Intern

Fixed Fees

	Monthly Intern Fee (October 2020)				2,272.73
	Total Fixed Fees				2,272.73

Total this Phase **\$2,272.73**

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Project	7345	Rhode Island EERMC - 2020			Invoice	7075
Billing Limits		Current	Prior	To-Date		
Total Billings		64,302.48	740,093.34	804,395.82		
Limit				945,000.00		
Remaining				140,604.18		
			Total this Invoice		\$64,302.48	

Billings to Date

	Current	Prior	Total
Labor	45,403.75	559,767.50	605,171.25
Subcontractor	16,626.00	159,544.00	176,170.00
Expense	0.00	2,600.00	2,600.00
Add-on	2,272.73	18,181.84	20,454.57
Totals	64,302.48	740,093.34	804,395.82

Project 7345 Rhode Island EERMC - 2020 Invoice 7075

Billing Backup

Tuesday, November 10, 2020

Optimal Energy Inc.

Invoice 7075 Dated 10/31/2020

8:02:39 AM

Phase 001 Policy & Strategy

Optimal Staff

			Hours	Rate	Amount
Belliveau, Eric	10/23/2020		1.00	195.00	195.00
	check in call with MG-planning, update on final plan, budget review, AESC disc on changes to demand and energy pricing.				
Guerard, Michael	10/5/2020		3.75	195.00	731.25
	EERMC mtg prep				
Guerard, Michael	10/6/2020		3.50	195.00	682.50
	EERMC mtg prep				
Guerard, Michael	10/7/2020		4.75	195.00	926.25
	Call w Peter case on PPlan; EERMC mtg prep; call w Joe G				
Guerard, Michael	10/8/2020		7.25	195.00	1,413.75
	OER/Div/C-Team chk-in; EERMC mtg, prep and debriefs				
Guerard, Michael	10/26/2020		1.25	195.00	243.75
	Coord mtg w Joe G, RI Housing per Joe's request, send mtg materials and Plan highlights to Joe, RIH				
Guerard, Michael	10/28/2020		3.50	195.00	682.50
	Call w Joe G, RIH; prep and debriefs with team, set up next steps; update on SRP TWG from team; Rez and CI team chk-ins				
Guerard, Michael	10/29/2020		2.25	195.00	438.75
	Review draft EERMC agenda; Coord and prep for OER mtg on legislation data; set up tasks/timing for EERMC mtg material development				
Guerard, Michael	10/30/2020		2.25	195.00	438.75
	EERMC mtg material dev; coord follow up MF mtg w Joe, OER, Grid, review MF plan materials				
Jacobs, Adam	10/19/2020		.25	185.00	46.25
	-review notes from RI Lighting Subgroup 10/15				
Jacobs, Adam	10/27/2020		.25	185.00	46.25
	-Check-in on meeting materials for C&I sector team call for next week				
Jacobs, Adam	10/28/2020		.50	185.00	92.50
	-RI C&I Sector Call Prep meeting				
Jacobs, Adam	10/29/2020		.25	185.00	46.25
	-follow-ups w/ new Division staff on C&I sector team meetings				
Ross, Samuel	10/1/2020		2.25	185.00	416.25
	Gas Rate&Bill work; econ mult study request				
Ross, Samuel	10/2/2020		6.25	185.00	1,156.25
	Reviewing final draft 3YP, 2021 Plan				
Ross, Samuel	10/3/2020		2.75	185.00	508.75
	Reviewing final draft 3YP, 2021 Plan				
Ross, Samuel	10/4/2020		4.25	185.00	786.25
	Reviewing final draft 3YP, 2021 Plan				

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Page 4

Project	7345	Rhode Island EERMC - 2020			Invoice	7075
Ross, Samuel		10/20/2020	2.50	185.00		462.50
	SRP BCA Model Review					
Socks, Matthew		10/6/2020	1.00	185.00		185.00
	Reviewing AESC Second Draft Deliverable #2 for upcoming Study Group call					
Socks, Matthew		10/7/2020	2.50	185.00		462.50
	AESC study check-in w/ B.Trietch; Reviewing AESC Second Draft Deliverable #2 for upcoming Study Group call					
Socks, Matthew		10/8/2020	1.50	185.00		277.50
	AESC support: researching marginal GHG abatement technologies in RI					
Socks, Matthew		10/9/2020	1.00	185.00		185.00
	Participating in AESC Study Group meeting to discuss counterfactuals					
Socks, Matthew		10/13/2020	1.00	185.00		185.00
	Reviewing AESC Draft Deliverable #3 in preparation for Study Group call					
Socks, Matthew		10/14/2020	1.75	185.00		323.75
	AESC study check-in w/ B.Trietch; Reviewing AESC Draft Deliverable #3 in preparation for Study Group call					
Socks, Matthew		10/15/2020	.75	185.00		138.75
	Reviewing AESC Draft Deliverable #3 in preparation for Study Group call					
Socks, Matthew		10/28/2020	2.50	185.00		462.50
	Reviewing Draft AESC 2021 report in preparation for Study Group call; AESC study check-in w/ B.Trietch					
Socks, Matthew		10/29/2020	1.75	185.00		323.75
	Reviewing Draft AESC 2021 report in preparation for Study Group call; Participating in AESC Study Group meeting					
Socks, Matthew		10/30/2020	2.25	185.00		416.25
	Reviewing Draft AESC 2021 report					
		Totals		64.75		12,273.75
		Total Labor				12,273.75
					Total this Phase	\$19,732.50

Phase	002	Cyclical Planning & Reporting			
Optimal Staff					
			Hours	Rate	Amount
Caesar, Adrian		10/1/2020	2.00	130.00	260.00
	3YP Draft/Targets comps analysis and visual buildout				
Caesar, Adrian		10/2/2020	6.75	130.00	877.50
	2021 AP/2021-2023 3YP final draft analysis and EERMC October presentation drafting				
Caesar, Adrian		10/4/2020	3.00	130.00	390.00
	2021-2023 3YP final draft analysis, BC/MPS mapping tool 3YP final draft updates				
Caesar, Adrian		10/5/2020	7.25	130.00	942.50
	3YP and Annual Plan final draft analysis and QA/QC, 3YP and AP slide deck drafting and review				

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Project	7345	Rhode Island EERMC - 2020			Invoice	7075
Caesar, Adrian		10/6/2020	5.50	130.00		715.00
		3YP and Annual Plan final draft analysis and QA/QC, 3YP and AP slide deck drafting and review, 3YP/2021 AP first and final draft measure/program level delta analysis				
Caesar, Adrian		10/7/2020	5.25	130.00		682.50
		3YP and Annual Plan final draft analysis and QA/QC, 3YP and AP slide deck drafting and review, 3YP/2021 AP first and final draft measure/program level delta analysis, Council Mtg Presentation Prep				
Caesar, Adrian		10/8/2020	4.50	130.00		585.00
		EERMC october meeting prep, Measure/End use-level delta analysis (2021 AP/3YP drafts)				
Caesar, Adrian		10/15/2020	3.00	130.00		390.00
		NGrid August program performance Data Report				
Caesar, Adrian		10/19/2020	3.50	130.00		455.00
		September Res/C&I NGrid program Data Report and Q3 updates				
Caesar, Adrian		10/28/2020	1.00	130.00		130.00
		C&I and Res sector team mtg prep calls, C-Team comments on Data through Q3 and prelim. Q3 results discussion				
Caesar, Adrian		10/29/2020	2.75	130.00		357.50
		Preliminary Q3 data update and presentation draft, Res C-Team preliminary Q3 feedback review,				
Guerard, Michael		10/1/2020	3.75	195.00		731.25
		Sector review, Planning updates, BP research				
Guerard, Michael		10/2/2020	5.00	195.00		975.00
		Annual and 3YP review				
Guerard, Michael		10/5/2020	3.50	195.00		682.50
		2021 plan review				
Guerard, Michael		10/6/2020	3.75	195.00		731.25
		2021 plan review				
Guerard, Michael		10/20/2020	3.75	195.00		731.25
		Updates on sector mtg strategy for year-end; review final submittal of plans				
Guerard, Michael		10/21/2020	.50	195.00		97.50
		Coord mtg w Frank Owens, Sam, Becca on CPACE opp				
Guerard, Michael		10/27/2020	1.50	195.00		292.50
		Review SRP materials; preliminary check on TRM posted on PUC website				
Jacobs, Adam		10/2/2020	2.75	185.00		508.75
		-RI daily scrum final plan review strategy -review of Grid 2021 final plan Attachment 2 C&I -final 2021-2023 BC model C&I measure analysis -C&I themes for annual and 3yp presentations				
Jacobs, Adam		10/5/2020	2.00	185.00		370.00
		-updates to slides for October EERMC 2021 plan and 3YP C&I sector highlights -daily scrum planning discussions to close out plan-review -Check in on Council Slides				
Jacobs, Adam		10/6/2020	.75	185.00		138.75
		-final edits to 2021 and 3YP slides for EERMC meeting -1/2 RI daily scrum planning presentation				
Jacobs, Adam		10/7/2020	.50	185.00		92.50
		-check-in on C&I EERMC presentation content and cost savings from our BCR comments				

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Project	7345	Rhode Island EERMC - 2020			Invoice	7075
Jacobs, Adam		10/13/2020	.25	185.00		46.25
		-1/2 RI daily scrum on final plan debrief				
Johnson, Craig		10/1/2020	2.00	150.00		300.00
		prep slides for Council meeting				
Johnson, Craig		10/2/2020	4.50	150.00		675.00
		Review of Final draft of 2021 and 2021-2023 plans.				
Johnson, Craig		10/4/2020	8.00	150.00		1,200.00
		Review final draft of 2021 Annual Plan and 2021-2023 3 YR Plan. Review narrative and numbers for comparisons between drafts.				
Johnson, Craig		10/5/2020	8.00	150.00		1,200.00
		Review final draft of 2021 Annual Plan and 2021-2023 3 YR Plan. Review narrative and numbers for comparisons between drafts. Discuss and develop slide content for Council meeting on this topic. General updates and check-ins w/ RI Team. Update graphics for cost-effectiveness memo.				
Johnson, Craig		10/6/2020	6.00	150.00		900.00
		Review/develop content for 3YP and Annual plan presentations				
Johnson, Craig		10/7/2020	4.00	150.00		600.00
		Review Plans and prep for Council meeting presentations.				
Johnson, Craig		10/8/2020	6.50	150.00		975.00
		Review outstanding issues with EE plan in advance of Council vote. Prep for Council meeting presentations. Council Meeting.				
Johnson, Craig		10/9/2020	.75	150.00		112.50
		EE TWG meeting				
Johnson, Craig		10/14/2020	.50	150.00		75.00
		RI Plan debrief - revisit residential comments addressed/not addressed, provide update to sector team.				
Johnson, Craig		10/15/2020	.25	150.00		37.50
		RI Plan debrief - schedule debrief meeting.				
Johnson, Craig		10/20/2020	2.00	150.00		300.00
		Internal debrief w/ Residential sector team on RI Plans, meeting prep. Discuss EERMC website update needs w/ Adrian.				
Johnson, Craig		10/21/2020	2.75	150.00		412.50
		Review LCP research status, check-in call w/ Becca and Mike. Review website updates.				
Johnson, Craig		10/23/2020	1.50	150.00		225.00
		Review Website updates, discuss updates w/ Rachel and Adrian				
Johnson, Craig		10/28/2020	3.50	150.00		525.00
		Review preliminary Q3 residential data. Internal prep call for next week's sector strategy meeting, draft agenda for sector strategy meeting. Discuss needs for Council meeting w/ Mike.				
Johnson, Craig		10/29/2020	1.00	150.00		150.00
		Review residential data report and C-Team questions				
Johnson, Craig		10/30/2020	1.00	150.00		150.00
		Develop/distribute agenda for RI Monthly Res Sector strategy mtg				
Ross, Samuel		10/5/2020	12.00	185.00		2,220.00
		Plan review feedback, slides etc. re: Annual Plan, 3YP; CE Report and associated slides				
Ross, Samuel		10/6/2020	6.75	185.00		1,248.75
		Finalizing slides & QA re: Annual Plan, 3YP, CE Report and associated slides				
Ross, Samuel		10/7/2020	7.50	185.00		1,387.50

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Project	7345	Rhode Island EERMC - 2020		Invoice	7075
		EM&V mtg, check in with Peter; prepping supporting analysis for slide decks, further slide review; meetings re: presentation plan + narrative for Council mtg; QA/QC for plan & discussions with GRID; budget pull for Becca			
Ross, Samuel		10/8/2020	7.75	185.00	1,433.75
		C-Team Check in; final slide QA/QC, revision, and submission; Council meeting			
Ross, Samuel		10/9/2020	2.75	185.00	508.75
		Council mtg follow up; EE TWG; quick review of division comments on SRP 3YP			
Ross, Samuel		10/12/2020	3.50	185.00	647.50
		Finalizing CE Memo, Plan editorial Feedback for Grid			
Ross, Samuel		10/13/2020	.75	185.00	138.75
		following up on final plan edits; disc. next steps			
Ross, Samuel		10/14/2020	2.00	185.00	370.00
		CE Report updates, vote language, emailing re: same w/OER and Marisa			
Ross, Samuel		10/15/2020	1.00	185.00	185.00
		SRP TRM Review for Carrie's Qs			
Ross, Samuel		10/19/2020	.75	185.00	138.75
		Emailing & disc re: submission of CE Report			
Ross, Samuel		10/22/2020	2.50	185.00	462.50
		Finish reviewing SRP BCA & TRM; call re: same			
Ross, Samuel		10/23/2020	1.50	185.00	277.50
		EE C-Team Check In; SRP TRM & BCA Model review discussion, sending to Grid			
Ross, Samuel		10/28/2020	4.25	185.00	786.25
		SRP TWG, Res EM&V, prep re: same; working with Matt S. on AESC Economic modeling			
Ross, Samuel		10/29/2020	1.00	185.00	185.00
		finance call with Frank Owens, prep re: same			
Ross, Samuel		10/30/2020	1.25	185.00	231.25
		initial planning re: SRP CE Report, initial overview of final SRP 3YP			
		Totals	180.00		29,241.25
		Total Labor			29,241.25
				Total this Phase	\$34,861.75

Phase 003 EERMC Oversight - EMV

Optimal Staff

			Hours	Rate	Amount
Guerard, Michael		10/1/2020	1.75	195.00	341.25
		Review status of studies			
Guerard, Michael		10/21/2020	1.25	195.00	243.75
		Review EMV study on strategic elec; review upcoming EMV tasks for year			
Guerard, Michael		10/27/2020	.25	195.00	48.75
		Update on CI gas demand study			
Jacobs, Adam		10/1/2020	.25	185.00	46.25
		-follow-up on RI PY2018 C&I Custom Gas Impact Evaluation Report			

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Project	7345	Rhode Island EERMC - 2020			Invoice	7075
Jacobs, Adam		10/7/2020	.50	185.00		92.50
		-C&I EMV monthly check-in call				
Jacobs, Adam		10/12/2020	.25	185.00		46.25
		-final RI PY2018 C&I Custom Gas Impact Evaluation Report and Site Report review				
Jacobs, Adam		10/14/2020	.50	185.00		92.50
		-RI custom gas Site ID: 2018RIG55 project review				
		-RI 2020 Upstream Lighting Work Plan_Draft review				
Jacobs, Adam		10/15/2020	.25	185.00		46.25
		-review RI Strategic Electrification Report Document				
Jacobs, Adam		10/16/2020	.25	185.00		46.25
		-Strategic Electrification study close-out				
		-follow-ups on custom gas 2018 report				
Jacobs, Adam		10/22/2020	.25	185.00		46.25
		-follow-ups on RI Upstream Lighting Draft Work Plan				
Jacobs, Adam		10/23/2020	.25	185.00		46.25
		-C&I Gas Peak Demand Study - Kick Off Meeting prep/scheduling				
Jacobs, Adam		10/27/2020	1.00	185.00		185.00
		-C&I Gas Peak Demand Study Kick Off Meeting				
Jacobs, Adam		10/28/2020	.25	185.00		46.25
		-follow-up on gas DR study from Grid MA/UMass Lowell for RI C&I Peak Gas Demand Study				
Jacobs, Adam		10/29/2020	.50	185.00		92.50
		-review and comment on RI C&I FRSO Draft Report				
Johnson, Craig		10/6/2020	1.75	150.00		262.50
		Review and distribute EM&V tracker to C&I team. Review and distribute SEM Report documents and Upstream Lighting work plan to C&I team.				
Johnson, Craig		10/7/2020	1.00	150.00		150.00
		Monthly C&I EM&V meeting				
Johnson, Craig		10/15/2020	1.50	150.00		225.00
		Review completed studies and direct Adrian to post to Council website. Review notes from Regional lighting sales data analysis call. Review stock-turnover models and final report provided as part of heat pump market assessment. Review revised Task 3 memo for legislated study. Review documents/c-team comments for 2018 C&I Custom Gas report.				
Johnson, Craig		10/16/2020	1.00	150.00		150.00
		review strategic electrification report				
Johnson, Craig		10/20/2020	.75	150.00		112.50
		Review/compile C-Team comments on SEM report and Upstream lighting workplan, emails				
Johnson, Craig		10/21/2020	.50	150.00		75.00
		Review/compile C-Team comments on SEM report and Upstream lighting workplan, distribute comments to Grid.				
Johnson, Craig		10/23/2020	2.00	150.00		300.00
		Heating electrification comment review, consolidate feedback.				
Johnson, Craig		10/28/2020	1.50	150.00		225.00
		Review study tracker. Monthly Res EM&V check-in call. Review documents and deadlines currently out for review.				
Johnson, Craig		10/30/2020	.50	150.00		75.00

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020	Invoice	7075
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Review/Consolidate comments on Gas peak demand study

Totals 18.00 2,995.00

Total Labor 2,995.00

Total this Phase \$6,541.75

Phase 004 EERMC Oversight - Education/Stakeholders

Optimal Staff

		Hours	Rate	Amount
Caesar, Adrian	10/2/2020	.50	130.00	65.00
October EERMC mtg material upload				
Caesar, Adrian	10/7/2020	.50	130.00	65.00
October Meeting Materials Upload				
Caesar, Adrian	10/8/2020	.25	130.00	32.50
EERMC october meeting materials upload				
Caesar, Adrian	10/13/2020	.25	130.00	32.50
EERMC Website - Council page updates				
Caesar, Adrian	10/16/2020	.50	130.00	65.00
EERMC Website - EM&V studies updates				
Caesar, Adrian	10/20/2020	2.00	130.00	260.00
EERMC Website updates, 2021 Annual Plan and 2021-2023 3YP upload				
Caesar, Adrian	10/26/2020	1.00	130.00	130.00
EERMC home page information updates, EERMC URI PIER lecture series information event upload				
Guerard, Michael	10/7/2020	.50	195.00	97.50
Prep and debrief Education call				
Guerard, Michael	10/21/2020	.75	195.00	146.25
EERMC Website updates, next steps w team				
Totals		6.25		893.75
Total Labor				893.75
Total this Phase				\$893.75
Total this Project				\$62,029.75
Total this Report				\$62,029.75

George Lawrence, Caerbannog Consulting
3540 Mountain Rd
Addison VT 05491

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 33
Invoice Date: *October 31, 2020*
OEI Project #: 7345

Work Performed for Rhode Island EERMC

Description of Services		Amount	
Services Performed 10/1/20 through 10/31/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	2.00	\$185.00	\$370.00
LABOR - Travel Hours	0.00	\$92.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$370.00</u>

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
10/7/20	Review evaluation SEM program comparison memo			0.25			0.25	0.00	0.25
10/12/2020	Review SEM evaluation report			0.75			0.75	0.00	0.75
10/28/2020	Consultant team call			0.50			0.50	0.00	0.50
10/29/2020	Review Sept performance report and presentations, provide questions			0.50			0.50	0.00	0.50
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	2.00	0.00	0.00	2.00	0.00	2.00
	Total Amount	\$0.00	\$0.00	\$370.00	\$0.00	\$0.00	\$370.00	0.00	\$370.00

Margie Lynch/Core Energy Insights, Inc.
111 Hooksett Road, Auburn, NH 03032

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 10-2020*
Invoice Date: *October 31, 2020*
OEI Project #: *7345*

Work Performed for Rhode Island EERMC Project

Description of Services	Amount
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Services Performed 10/01/2020 through 10/31/2020

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	3.00	\$176.00	\$528.00

TOTAL DUE

\$528.00

Margie Lync Core Energy Insights, Inc.
Services Performed 10/01/2020 through 10/31/2020

Date	Description of Services	001 - Policy Strategy	002 - Cyclical Planning & Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
10/20/20	Reviewed final 2021 plan and discussed same with res C-team		1.75				1.75	0.00	1.75
10/28/2020	Reviewed September data; discussed same with C-team		1.25				1.25	0.00	1.25
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	3.00	0.00	0.00	0.00	3.00	0.00	3.00
	Total Amount	\$0.00	\$520.00	\$0.00	\$0.00	\$0.00	\$520.00	0.00	\$520.00

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Invoice

TO: Optimal Energy Inc.
April Clodgo
10600 Route 116, Suite 3
Hinesburg, VT 05461
clodgo@optenergy.com

Invoice #:4295
Invoice Date: 11/5/2020
Invoice Period: 10/1/2020-10/31/2020
Job Name: RI EERMC
Terms: Net 30 Days
PO # 3200362251

Consultant Labor	Job-Phase-Project	Project Description	Rate	Hours	Amount
Dan Mellinger	4104-00-02	Cyclical Planning & Reporting Activities	\$185.00	7.50	\$1,387.50
Glenn Reed	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	9.00	\$1,755.00
Richard Faesy	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	10.00	\$1,950.00
EFG Labor Subtotal:				26.50	\$5,092.50

TOTAL DUE THIS INVOICE: \$5,092.50 USD

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4295
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 10/1/2020-10/31/2020
Consultant: Dan Mellinger

Date	Phase-Project	Project Description	Hours Task Description
10/1/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review NEEA study on LLLC
10/15/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Update RI upstream data dashboard and prepare agenda for 10/15 lighting subgroup meeting
10/16/2020	00-02	Cyclical Planning & Reporting Activities	1.50 RI lighting subgroup meeting
10/17/2020	00-02	Cyclical Planning & Reporting Activities	1.25 Compile and send notes for lighting subgroup; review RI upstream impact eval SOW
10/18/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Review RI upstream impact eval SOW
10/21/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Upstream data questions for Ben and Travis
10/28/2020	00-02	Cyclical Planning & Reporting Activities	1.25 C&I C-team prep call; review final plan details
TOTAL:			7.50

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4295
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 10/1/2020-10/31/2020
Consultant: Glenn Reed

Date	Phase-Project	Project Description	Hours Task Description
10/9/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Review and comment on monthly YTD lighting and products numbers
10/18/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review of RI Passive House offer and comparison to MA's
10/19/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Review revised NMR lighting report and S-curves
10/20/2020	00-02	Cyclical Planning & Reporting Activities	2.00 Review of 2021 Plan filing, debrief call
10/26/2020	00-02	Cyclical Planning & Reporting Activities	2.25 Review and comments on Q3 data
10/27/2020	00-02	Cyclical Planning & Reporting Activities	1.00 RI Q3 data review, follow up on BCR model
10/28/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Monthly Grid meeting prep call, call prep
10/28/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Monthly RI EM&V call
10/29/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Review and comment on Gas end use metering study Options, call w/R. Prahl, review of OER comments
TOTAL:			9.00

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4295
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 10/1/2020-10/31/2020
Consultant: Richard Faesy

Date	Phase-Project	Project Description	Hours Task Description
10/6/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Virtual assessments
10/7/2020	00-02	Cyclical Planning & Reporting Activities	1.00 RI Green Energy Consumers Alliance health and EE webinar
10/20/2020	00-02	Cyclical Planning & Reporting Activities	1.50 Plan review comments, debrief
10/21/2020	00-02	Cyclical Planning & Reporting Activities	1.50 NEEP Heat Pump workshop (split with CT and EFG)
10/22/2020	00-02	Cyclical Planning & Reporting Activities	3.50 Cadmus electrification heat pump report review
10/27/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Review data with G. Reed
10/28/2020	00-02	Cyclical Planning & Reporting Activities	2.00 C-Team prep meeting, review data and add questions
TOTAL:			10.00

Pay to: Jennifer Chiodo
JLC Consulting, LLC
52 Bent Creek Road
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-2020.07*
Invoice Date: *October 31, 2020*
OEI Project #: *7345*

Work Performed for Rhode Island EERMC Project

Description of Services		Amount	
Services Performed 10/01/20 through 10/31/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	2.25	\$195.00	\$438.75
LABOR - Travel Hours	0.00	\$97.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$31.75</u>

LC Consulting, LLC

Services Performed 10/01/20 through 10/31/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning & Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
10/28/20	RI call prep and document review			2.25			2.25	0.00	2.25
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	2.25	0.00	0.00	2.25	0.00	2.25
	Total Amount	\$0.00	\$0.00	\$33.75	\$0.00	\$0.00	\$33.75	0.00	\$33.75

Ralph Prah
7613 Whitebridge Glen, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 17
Invoice Date: October 31, 2020
OEI Project #: 7345

Work Performed for Rhode Island EERMC Project

Description of Services		Amount	
Services Performed 9/01/20 through 10/31/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	38.25	\$195.00	\$7,458.75
LABOR - Travel Hours	0.00	\$97.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$7,458.75</u>

Ralp Pra

Services Performed 01/20 through 10/31/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stateholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
9/1/2020	EM&V plan	0.50					0.50	0.00	0.50
9/2/2020	C&I studies check-in call; res retro study reports; C&I NTG study;	1.75					1.75	0.00	1.75
9/3/2020	2021 EM&V plan; C&I NTG study	2.00					2.00	0.00	2.00
9/7/2020	codes promulgation issue from Phil; C&I NTG study; HER eval report rev	1.25					1.25	0.00	1.25
9/8/2020	codes issue from Phil	0.25					0.25	0.00	0.25
9/9/2020	codes impact accounting – call with phil; HP report	1.75					1.75	0.00	1.75
9/10/2020	hp report	0.75					0.75	0.00	0.75
9/11/2020	C&I NTG (conf call); codes impact accounting (call w Phil)	1.50					1.50	0.00	1.50
9/14/2020	leg study (follow-up intvw memo); codes impact issues	0.50					0.50	0.00	0.50
9/15/2020	hp rep; leg study report	1.00					1.00	0.00	1.00
9/16/2020	HP report; res ltg sales data report	1.00					1.00	0.00	1.00
9/17/2020	leg study report; C&I custom gas impact report; C&I NTG study	1.25					1.25	0.00	1.25
9/18/2020	C&I NTG study - conf call + follow-up	1.50					1.50	0.00	1.50
9/19/2020	res ltg sales data report	0.25					0.25	0.00	0.25
9/20/2020	C&I NTG study; C&I custom gas report rev	0.75					0.75	0.00	0.75
9/21/2020	C&I NTG study	0.25					0.25	0.00	0.25
9/22/2020	C&I NTG study	0.50					0.50	0.00	0.50
9/23/2020	res studies check-in call; C&I NTG study	2.00					2.00	0.00	2.00
9/25/2020	res ltg rep	0.25					0.25	0.00	0.25
10/1/2020	C&I custom gas study; res ltg sales data report	0.75					0.75	0.00	0.75
10/2/2020	leg report rev	0.25					0.25	0.00	0.25
10/6/2020	SEM report; C&I upstrm ltg res plan;	0.25					0.25	0.00	0.25
10/7/2020	C&I upstrm ltg res plan; C&I studies check-in call	1.50					1.50	0.00	1.50
10/8/2020	up ltg plan; SEM report	1.25					1.25	0.00	1.25
10/9/2020	SEM report	0.75					0.75	0.00	0.75
10/11/2020	SEM report	1.25					1.25	0.00	1.25
10/12/2020	custom gas rep	1.25					1.25	0.00	1.25
10/13/2020	custom gas rep	0.25					0.25	0.00	0.25
10/14/2020	cust gas site report; HP report	1.25					1.25	0.00	1.25
10/15/2020	hp report	1.25					1.25	0.00	1.25
10/16/2020	hp report	0.50					0.50	0.00	0.50
10/17/2020	hp report	1.25					1.25	0.00	1.25
10/19/2020	hp rep	1.00					1.00	0.00	1.00
10/21/2020	SEM report, C&I upstrm ltg res plan	0.25					0.25	0.00	0.25
10/22/2020	C&I upstrm impact eval query from Craig; leg study report	1.50					1.50	0.00	1.50
10/23/2020	hp rep; gas load shape study	0.50					0.50	0.00	0.50
10/24/2020	gas load shape study	0.50					0.50	0.00	0.50
10/25/2020	gas load shape study	0.25					0.25	0.00	0.25
10/26/2020	gas load shape studies	0.25					0.25	0.00	0.25
10/27/2020	C&I gas load shape study (conf call)	1.00					1.00	0.00	1.00
10/28/2020	res studies check-in call + prep	0.75					0.75	0.00	0.75
10/30/2020	gas load shape studies; C&I NTG report	1.50					1.50	0.00	1.50
	Total hours	31.25	0.00	0.00	0.00	0.00	31.25	0.00	31.25
	Total Amount	\$7,517.50	\$0.00	\$0.00	\$0.00	\$0.00	\$7,517.50	0.00	\$7,517.50

Rachel Sholly
48 Hudson Street
Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 34
Invoice Date: October 31, 2020
OEI Project #: 7345

Work Performed for Rhode Island EERMC Project

Description of Services		Amount	
Services Performed 10/01/20 through 10/31/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	18.50	\$148.00	\$2,738.00
LABOR - Travel Hours	0.00	\$74.00	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$2,738.00</u>

Rachel Solly

Services Performed 10/01/20 through 10/31/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
10/5/2020	Drafted edu agenda; Drafted edu activities summary memo; Weekly Optimal team scrum; Analyzed & summarized event survey data; Sent edu agenda & materials			4.25			4.25		4.25
10/7/2020	Edu call & prep; URI Energy Lecture #1			3.00			3.00		3.00
10/8/2020	Sent Becca first lecture notes for chair report			0.50			0.50		0.50
10/13/2020	Weekly Optimal team scrum			0.50			0.50		0.50
10/14/2020	EERMC website meeting			0.75			0.75		0.75
10/16/2020	Website notes & follow-up strategy; Edu call notes & follow-ups			1.50			1.50		1.50
10/19/2020	Weekly Optimal team scrum; Updated EERMC stakeholder list; Strategized on member education & experience			2.50			2.50		2.50
10/20/2020	EERMC website updates			0.50			0.50		0.50
10/21/2020	Edu call - event planning & follow-up			1.00			1.00		1.00
10/26/2020	Weekly Optimal team scrum; EERMC website updates			3.00			3.00		3.00
10/28/2020	URI Energy Lecture #2			1.00			1.00		1.00
	Total hours	0.00	0.00	14.50	0.00	0.00	14.50	0.00	14.50
	Total Amount	\$0.00	\$0.00	\$2,731.00	\$0.00	\$0.00	\$2,731.00	\$0.00	\$2,731.00

Invoice



November 30, 2020
Project No: 7345
Invoice No: 7094

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2020
PO #:

Professional Services from November 1, 2020 to November 30, 2020

Phase 001 Policy & Strategy

Optimal Staff

	Hours	Rate	Amount	
Belliveau, Eric	3.75	195.00	731.25	
Chant, Elizabeth	.25	195.00	48.75	
Guerard, Michael	36.75	195.00	7,166.25	
Jacobs, Adam	9.75	185.00	1,803.75	
Ross, Samuel	1.75	185.00	323.75	
Socks, Matthew	9.25	185.00	1,711.25	
Totals	61.50		11,785.00	
Total Labor				11,785.00
		Total this Phase		\$11,785.00

Phase 002 Cyclical Planning & Reporting

Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	19.50	130.00	2,535.00	
Guerard, Michael	38.25	195.00	7,458.75	
Jacobs, Adam	.25	185.00	46.25	
Johnson, Craig	32.75	150.00	4,912.50	
Ross, Samuel	35.00	185.00	6,475.00	
Totals	125.75		21,427.50	
Total Labor				21,427.50

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020	Invoice	7094
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Subcontractors

Core Energy Insights Inc.	440.00		
Energy Futures Group, Inc.	2,456.25		
Total Subcontractors	2,896.25		2,896.25
		Total this Phase	\$24,323.75

Phase	003	EERMC Oversight - EMV
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Optimal Staff

	Hours	Rate	Amount
Guerard, Michael	5.75	195.00	1,121.25
Jacobs, Adam	2.00	185.00	370.00
Johnson, Craig	19.25	150.00	2,887.50
Totals	27.00		4,378.75
Total Labor			4,378.75

Subcontractors

Rachel Sholly	3,108.00		
Caerbannog Consulting, LLC	370.00		
Total Subcontractors	3,478.00		3,478.00
		Total this Phase	\$7,856.75

Phase	004	EERMC Oversight - Education/Stakeholders
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Optimal Staff

	Hours	Rate	Amount
Caesar, Adrian	5.25	130.00	682.50
Guerard, Michael	4.25	195.00	828.75
Totals	9.50		1,511.25
Total Labor			1,511.25
		Total this Phase	\$1,511.25

Phase	005	Intern
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Fixed Fees

Monthly Intern Fee (November 2020)	2,272.73		
Total Fixed Fees	2,272.73		2,272.73
		Total this Phase	\$2,272.73

Billing Limits

	Current	Prior	To-Date
Total Billings	47,749.48	804,395.82	852,145.30
Limit			945,000.00
Remaining			92,854.70

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7345	Rhode Island EERMC - 2020	Invoice	7094
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Total this Invoice **\$47,749.48**

Billings to Date

	Current	Prior	Total
Labor	39,102.50	605,171.25	644,273.75
Subcontractor	6,374.25	176,170.00	182,544.25
Expense	0.00	2,600.00	2,600.00
Add-on	2,272.73	20,454.57	22,727.30
Totals	47,749.48	804,395.82	852,145.30

Project 7345 Rhode Island EERMC - 2020 Invoice 7094

Billing Backup

Wednesday, December 9, 2020

Optimal Energy Inc.

Invoice 7094 Dated 11/30/2020

8:24:35 AM

Phase 001 Policy & Strategy

Optimal Staff

			Hours	Rate	Amount
Belliveau, Eric	11/16/2020		1.00	195.00	195.00
	PIMS discussion from PUC with MG				
Belliveau, Eric	11/23/2020		1.00	195.00	195.00
	review data on PIMS from PUC, review plan and cross reference interrogatories. disc with MG				
Belliveau, Eric	11/24/2020		1.00	195.00	195.00
	review PIMS information from AC on PIMS comps, Porter emails on same.				
Belliveau, Eric	11/30/2020		.75	195.00	146.25
	view PUC meeting on PIMS, review questions in reference.				
Chant, Elizabeth	11/24/2020		.25	195.00	48.75
	meet with Mike on launch of Equity Working Group				
Guerard, Michael	11/2/2020		.50	195.00	97.50
	Call w OER to update on legislation data				
Guerard, Michael	11/5/2020		2.25	195.00	438.75
	Chk in call w BT/OER; Call w Grid/OER on 2021 timeline; EERMC mtg prep				
Guerard, Michael	11/6/2020		4.25	195.00	828.75
	Bi-weekly OER/Div check-in; EERMC mtg materials prep				
Guerard, Michael	11/9/2020		2.25	195.00	438.75
	Council mtg prep; Coord council admin items- mailing of Annual reports to members; payment of annual website fee				
Guerard, Michael	11/10/2020		3.50	195.00	682.50
	Review/comment on IRs for OER; Review IR RESPONSES FROM gRID TO puc; EERMC mtg prep				
Guerard, Michael	11/11/2020		2.25	195.00	438.75
	EERMC mtg prep on presentations;				
Guerard, Michael	11/12/2020		4.75	195.00	926.25
	EERMC mtg, prep and debriefs; update w Marisa on PUC next steps				
Guerard, Michael	11/13/2020		4.25	195.00	828.75
	SRP settlement mtg; EE settlement mtg; review PUC IRs and responses				
Guerard, Michael	11/19/2020		1.25	195.00	243.75
	Finalize and send C-E Report to Marisa; team PUC Open mtg coord				
Guerard, Michael	11/20/2020		1.75	195.00	341.25
	OER/Div/C-Team bi-weekly, follow-up tasks				
Guerard, Michael	11/24/2020		3.75	195.00	731.25
	Call w OER/RIIB on PUC prep; Work on 2021 timeline-process; call w OER on remaining 2020 tasks and 2021 prep				
Guerard, Michael	11/25/2020		3.75	195.00	731.25
	PUC Open mtg on 2021 EEPP, team debriefs; coord response to PUC on EERMC DR on minutes w OER, team and Marisa; source send bill impact memo to BT; finalize updated PIM comps ans send to Grid, review Grid' text				

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Page 4

Project	7345	Rhode Island EERMC - 2020			Invoice	7094
Guerard, Michael		11/30/2020	2.25	195.00		438.75
		Review SRP C-E submittal from Marisa; work on timeline-process; prep for PUC mtgs				
Jacobs, Adam		11/2/2020	.25	185.00		46.25
		-agenda and data questions for RI C&I sector team call				
Jacobs, Adam		11/3/2020	.25	185.00		46.25
		-Grid staffing and sector team call discussion				
Jacobs, Adam		11/4/2020	.50	185.00		92.50
		-review of Q3 C&I data for small biz trends and locational savings weighting by city/town				
Jacobs, Adam		11/5/2020	1.75	185.00		323.75
		-RI EE C&I Sector Team call				
		-Small biz geographic participation analysis 2020YTD follow-ups				
Jacobs, Adam		11/6/2020	1.25	185.00		231.25
		-materials for EERMC council meeting				
		-follow-ups on C&I multifamily gas savings/reporting				
Jacobs, Adam		11/9/2020	.25	185.00		46.25
		-1/2 RI daily scrum November EERMC presentation planning				
Jacobs, Adam		11/11/2020	.50	185.00		92.50
		-Check-in on EERMC meeting sector slides				
Jacobs, Adam		11/12/2020	1.00	185.00		185.00
		-1/2 RI EERMC meeting				
		-prep for presentation				
Jacobs, Adam		11/16/2020	1.50	185.00		277.50
		-review NGrid 2020 plan commitment tracker doc				
		-National Grid Commitments Tracker check-in call				
		-call to Plan out balance of 2020 tasks/timeline				
Jacobs, Adam		11/18/2020	1.00	185.00		185.00
		-RI sector team coordination				
Jacobs, Adam		11/20/2020	1.25	185.00		231.25
		-C&I sector team meeting agenda				
		-RI 2021 planning				
		-C&I sector team agenda for December meeting				
Jacobs, Adam		11/30/2020	.25	185.00		46.25
		-C&I sector team call meeting update				
Ross, Samuel		11/16/2020	1.75	185.00		323.75
		planning discussions re: remainder of 2020, begin discussions re: 2021 work plan				
Socks, Matthew		11/5/2020	1.25	185.00		231.25
		AESC draft deliverable review; compiling review notes				
Socks, Matthew		11/6/2020	1.50	185.00		277.50
		AESC draft deliverable review; compiling review notes				
Socks, Matthew		11/11/2020	1.00	185.00		185.00
		Review AESC 2021 Second Draft deliverable				
Socks, Matthew		11/12/2020	1.50	185.00		277.50
		Review AESC 2021 Second Draft deliverable				
Socks, Matthew		11/17/2020	1.75	185.00		323.75
		Reviewing third draft of AESC 2021 report; preparing notes				
Socks, Matthew		11/19/2020	1.00	185.00		185.00
		Participating in AESC Study Group meeting/prep				

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Project	7345	Rhode Island EERMC - 2020		Invoice	7094
Socks, Matthew		11/24/2020	1.25	185.00	231.25
		Developing/submitting comments on Third Draft AESC 2021 Report			
		Totals	61.50		11,785.00
		Total Labor			11,785.00
				Total this Phase	\$11,785.00

Phase 002 Cyclical Planning & Reporting

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian	11/5/2020		3.50	130.00	455.00
		C&I and Residential Sector team meetings			
Caesar, Adrian	11/6/2020		3.25	130.00	422.50
		National Grid Q3 Report review, Q3 Report, SRP presentation finalization - November EERMC Mtg			
Caesar, Adrian	11/9/2020		2.25	130.00	292.50
		National Grid 2020 Q3 Report review/analysis			
Caesar, Adrian	11/11/2020		.75	130.00	97.50
		Q3 Presentation - narrative and content finalization			
Caesar, Adrian	11/19/2020		4.75	130.00	617.50
		C&I and Res October Program Data Report and review			
Caesar, Adrian	11/20/2020		1.00	130.00	130.00
		RI 2020 Sector team/EM&V/SRP strategy discussion			
Caesar, Adrian	11/24/2020		4.00	130.00	520.00
		Docket 5076 PUC data request 4-38 PIMs review, NGrid Elec Resi measure data review, EERMC approved mtg minutes upload			
Guerard, Michael	11/2/2020		.75	195.00	146.25
		Coord MF call w JGarlick, OER, Grid; prep for monthly sector calls			
Guerard, Michael	11/3/2020		1.75	195.00	341.25
		Review PUC IRs to Grid; review sector data from Grid			
Guerard, Michael	11/5/2020		4.75	195.00	926.25
		Res sector monthly mtg; C&I monthly sector mtg; prep and debriefs. Prep for MF mtg w Joe G, OER, Grid; review SRP C-E report draft			
Guerard, Michael	11/6/2020		1.50	195.00	292.50
		MF call w JGarlick/Becca, coord next steps w Grid; BP research			
Guerard, Michael	11/9/2020		2.75	195.00	536.25
		MF call w OER, Grid, JoeG, prep and follow-up tasks; chk-in on upcoming sector oversight tasks			
Guerard, Michael	11/12/2020		1.25	195.00	243.75
		Coord EE marketing mtg participation; set up 2020 EOY planning			
Guerard, Michael	11/13/2020		1.25	195.00	243.75
		Draft protocols to support Process/timeline for Dec mtg			
Guerard, Michael	11/16/2020		3.50	195.00	682.50
		Respond to Grid Q on PIM response to IR; review Grid IR responses #3; 2020 EOY planning			
Guerard, Michael	11/17/2020		2.50	195.00	487.50
		Coord SRP C-E report filing; review MF issues, BP research			

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Project	7345	Rhode Island EERMC - 2020			Invoice	7094
Guerard, Michael		11/18/2020	2.50	195.00		487.50
		Review PDA tracker from Grid; prep for sector mtgs w team; schedule coord for upcoming IE/MF mtgs				
Guerard, Michael		11/19/2020	3.50	195.00		682.50
		Review MF/LMI planning doc from Grid; Review monthly sector data				
Guerard, Michael		11/20/2020	2.50	195.00		487.50
		Review MF process from Grid, follow-up coord; team prep for EOY sector tasks; data review				
Guerard, Michael		11/21/2020	1.25	195.00		243.75
		Follow-up on DR request from Grid on PIMs; prep for MF mtgs				
Guerard, Michael		11/22/2020	1.75	195.00		341.25
		Add'l Follow-up on DR request from Grid on PIMs, source send info to EB on PIMs; prep for MF mtgs; Work on 2021 timeline				
Guerard, Michael		11/23/2020	3.50	195.00		682.50
		Call w Grid on IE verification/rates; call w Grid/Joe G on MF agenda; prep and follow-up; prep for sector mtgs, agenda review				
Guerard, Michael		11/24/2020	2.75	195.00		536.25
		Call w Grid/Joe G on MF agenda update; PUC DR review of Grid's responses; chk-in with team on equity issues				
Guerard, Michael		11/30/2020	.50	195.00		97.50
		Coord updating sector mtg agendas				
Jacobs, Adam		11/30/2020	.25	185.00		46.25
		-follow-ups on RI Upstream Lighting study				
Johnson, Craig		11/2/2020	1.00	150.00		150.00
		Meeting w/ OER on update for LCP Research. Meeting prep.				
Johnson, Craig		11/3/2020	.25	150.00		37.50
		Review MassSave Heating and Cooling Conference Course catalog; e-mails internally to identify how/if we can bring to RI.				
Johnson, Craig		11/5/2020	3.00	150.00		450.00
		Prep/conduct residential monthly strategy meeting. Review Q3 results and prep content for Council presentation.				
Johnson, Craig		11/6/2020	5.00	150.00		750.00
		Review Q3 data and Q3 report, develop content for Council meeting presentation, review content and prep for Council meeting.				
Johnson, Craig		11/9/2020	3.00	150.00		450.00
		Review NGrid Q3 report. Review slides and prep narrative for Q3 update to Council.				
Johnson, Craig		11/10/2020	2.25	150.00		337.50
		Review slides and prep narrative for Q3 update to Council. Review NGrid responses to PUC IR on 2021 Plan.				
Johnson, Craig		11/11/2020	1.00	150.00		150.00
		Council meeting prep mtg w/ Mike, Adam, Adrian.				
Johnson, Craig		11/12/2020	6.00	150.00		900.00
		Council meeting and Council meeting prep.				
Johnson, Craig		11/16/2020	1.50	150.00		225.00
		Walkthrough commitment tracker task with Brian and Adam. Internal check-in call w/ RI C-Team to discuss work needs for the balance of the year and to start planning for 2021.				
Johnson, Craig		11/18/2020	2.75	150.00		412.50

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Project	7345	Rhode Island EERMC - 2020		Invoice	7094
		Review progress on 2021 plan commitment tracker. Draft res sector strategy meeting agenda. Coordinate w/ Adam and Mike on sector strategy meeting agenda topics for December, and for resetting meetings in 2021.			
Johnson, Craig		11/23/2020	4.50	150.00	675.00
		Draft monthly residential sector strategy meeting agenda. Monthly residential sector strategy meeting prep. Discuss EERMC website updates w/ Adrian.			
Johnson, Craig		11/24/2020	.50	150.00	75.00
		Review/comment on draft EERMC Website Survey options			
Johnson, Craig		11/25/2020	.25	150.00	37.50
		Send EERMC retreat slides to Nathan			
Johnson, Craig		11/30/2020	1.75	150.00	262.50
		Review updated draft survey regarding Council website, emails. Brainstorm ideas for MF Session pre-read document. Prep for residential sector strategy team meeting.			
Ross, Samuel		11/4/2020	4.50	185.00	832.50
		SRP 3YP final draft review; CE Report draft; discussion with OER			
Ross, Samuel		11/5/2020	8.75	185.00	1,618.75
		developing EERMC materials - finalizing SRP CE Memo, initial work on SRP CE Slide deck, SRP 3YP slide deck, contributions to timeline planning			
Ross, Samuel		11/6/2020	4.00	185.00	740.00
		OER C-Team check in - finalizing materials for Council Meeting to share with Becca, discussions re: same			
Ross, Samuel		11/10/2020	1.75	185.00	323.75
		SRP NWA BCA Discount Meeting, prep re: same			
Ross, Samuel		11/12/2020	6.00	185.00	1,110.00
		SRP Coordination with OER; prep talking points and review slides for Council meeting; Council meeting			
Ross, Samuel		11/13/2020	2.00	185.00	370.00
		SRP & EE TWG / Settlements			
Ross, Samuel		11/20/2020	4.25	185.00	786.25
		EE C-Team check in, prep re: same; continued 2021 planning, internal discussions re: same; EM&V WTP study correspondence			
Ross, Samuel		11/30/2020	3.75	185.00	693.75
		review materials and begin internal planning re: PUC hearings; begin review of South Kingstown RFP			
		Totals	125.75		21,427.50
		Total Labor			21,427.50
				Total this Phase	\$24,323.75

Phase 003 EERMC Oversight - EMV

Optimal Staff

			Hours	Rate	Amount
Guerard, Michael		11/9/2020	1.00	195.00	195.00
		Review Strat. Elec report and associated communications from team, stakeholders			
Guerard, Michael		11/10/2020	.75	195.00	146.25
		Review Legislated EE Study			

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Project	7345	Rhode Island EERMC - 2020			Invoice	7094
Guerard, Michael		11/12/2020	.50	195.00	97.50	
		Monitor updates on Strat. Elec study				
Guerard, Michael		11/17/2020	1.75	195.00	341.25	
		Review Strat Elec and gas peak study updates				
Guerard, Michael		11/20/2020	.75	195.00	146.25	
		Updates on status of remaining EMV studies				
Guerard, Michael		11/23/2020	1.00	195.00	195.00	
		Review team email traffic on multiple studies wrapping up				
Jacobs, Adam		11/3/2020	.25	185.00	46.25	
		-C&I Gas Load Shapes Study sources notes				
		-follow-ups on RI C&I FRSO Draft Report				
Jacobs, Adam		11/4/2020	.75	185.00	138.75	
		-RI C&I EMV call				
Jacobs, Adam		11/9/2020	.50	185.00	92.50	
		-Strategic Electrification Report Document notes				
Jacobs, Adam		11/13/2020	.25	185.00	46.25	
		-Strategic Electrification Report Document comments on awareness				
Jacobs, Adam		11/19/2020	.25	185.00	46.25	
		-review final RI C&I FRSO Draft Report				
Johnson, Craig		11/3/2020	2.00	150.00	300.00	
		Review C&I FRSO Study Final Report. Compile C-Team and OER comments and distribute back to NGrid and vendor.				
Johnson, Craig		11/4/2020	1.00	150.00	150.00	
		Monthly C&I EM&V check-in and meeting prep.				
Johnson, Craig		11/5/2020	1.00	150.00	150.00	
		Review Gas Peak Demand study documents.				
Johnson, Craig		11/6/2020	.50	150.00	75.00	
		Review/coordinate review on Gas Peak Demand Study documents, legislated study, X-State Lighting study.				
Johnson, Craig		11/9/2020	1.50	150.00	225.00	
		Review Task 1 report for legislated study.				
Johnson, Craig		11/10/2020	1.25	150.00	187.50	
		Review Task 1 report for legislated study.				
Johnson, Craig		11/13/2020	1.00	150.00	150.00	
		Strategic Electrification study, cross reference potential with current planning, emails about the same.				
Johnson, Craig		11/16/2020	1.00	150.00	150.00	
		Strategic Electrification study - review report and move forward conversations regarding next steps				
Johnson, Craig		11/17/2020	3.25	150.00	487.50	
		Review/track progress on comments on Regional Lighting Sales Data Analysis report, Strategic Electrification Report, and Gas Peak Demand Study approaches, emails about the same.				
Johnson, Craig		11/18/2020	1.25	150.00	187.50	
		Inquire w/ Grid and C-Team to see if monthly resi em&v meeting needs to be rescheduled; cancel meeting. Review updates to C&I FRSO draft report.				
Johnson, Craig		11/24/2020	2.50	150.00	375.00	

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Project	7345	Rhode Island EERMC - 2020	Invoice	7094
		Review C-Team and OER comments on options for Resi Gas Peak Demand Study. Review DNVGL's responses to C-Team/OER comments on Upstream Lighting Work Plan. Review and respond to additional comments on C&I FRSO Draft Report.		
Johnson, Craig	11/25/2020	1.50	150.00	225.00
		Review C&I Upstream Lighting Work Plan comments and responses. Review monthly study update tracker.		
Johnson, Craig	11/30/2020	1.50	150.00	225.00
		Review Res EMV tracker, distribute to team. Review comments/responses to Heat Pump Market study, Regional Sales Data Report. Review C&I Upstream Lighting Workplan & emails. Review Sense Study draft final report.		
	Totals	27.00		4,378.75
	Total Labor			4,378.75
			Total this Phase	\$7,856.75

Phase 004 EERMC Oversight - Education/Stakeholders

Optimal Staff

		Hours	Rate	Amount
Caesar, Adrian	11/4/2020	.50	130.00	65.00
	Homepage update - featured events/PIER Lecture #3 page creation, Councilor photo update - Bill Riccio			
Caesar, Adrian	11/5/2020	.50	130.00	65.00
	EERMC website homepage modifications			
Caesar, Adrian	11/6/2020	.50	130.00	65.00
	November EERMC mtg materials upload and 2020 Results and Reporting update			
Caesar, Adrian	11/10/2020	.25	130.00	32.50
	November EERMC mtg materials upload			
Caesar, Adrian	11/11/2020	.25	130.00	32.50
	November EERMC mtg materials upload			
Caesar, Adrian	11/12/2020	.50	130.00	65.00
	November EERMC final mtg materials upload, 2021 November EERMC timeline feedback documentation			
Caesar, Adrian	11/16/2020	1.25	130.00	162.50
	2020 Q4 and 2021 planning C-Team strategy discussion			
Caesar, Adrian	11/18/2020	.50	130.00	65.00
	EERMC Website Councilor survey for website improvements strategizing			
Caesar, Adrian	11/30/2020	1.00	130.00	130.00
	2021 EERMC Education strategy planning			
Guerard, Michael	11/5/2020	.50	195.00	97.50
	Debrief w RS on Education call			
Guerard, Michael	11/17/2020	.75	195.00	146.25
	Chk-in on lecture series status, tasks; updates on annual report mailing and website survey of council members			
Guerard, Michael	11/25/2020	.75	195.00	146.25
	Review draft website survey			
Guerard, Michael	11/30/2020	2.25	195.00	438.75

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Project	7345	Rhode Island EERMC - 2020	Invoice	7094
	Call w RS, AC on 2020 Educ. wrap-up tasks, plnning 2021			
	Totals	9.50	1,511.25	
	Total Labor			1,511.25
			Total this Phase	\$1,511.25
			Total this Project	\$45,476.75
			Total this Report	\$45,476.75

George Lawrence, Caerbannog Consulting
3540 Mountain Rd
Addison VT 05491

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 36
Invoice Date: *November 30, 2020*
OEI Project #: 7345

Rhode Island EERMC

Description of Services		Amount	
Services Performed 11/01/20 through 11/30/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	2.00	\$185.00	\$370.00
LABOR - Travel Hours	0.00	\$92.50	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$370.00</u>

George Lawrence, Caerbannog Consulting
Services Performed 11/01/20 through 11/30/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
11/5/20	Check in call with National Grid			1.50			1.50	0.00	1.50
11/20/2020	Prep for meeting on Dec 3, discussion of SEM measure life			0.50			0.50	0.00	0.50
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	2.00	0.00	0.00	2.00	0.00	2.00
	Total Amount	\$0.00	\$0.00	\$370.00	\$0.00	\$0.00	\$370.00	0.00	\$370.00

Energy Futures Group, Inc.

PO Box 587
Hinesburg, VT 05461
Phone: (802) 482-5001
Fax: (802) 329-2143



Invoice

TO: Optimal Energy Inc.
April Clodgo
10600 Route 116, Suite 3
Hinesburg, VT 05461
clodgo@optenergy.com

Invoice #:4354
Invoice Date: 12/5/2020
Invoice Period: 11/1/2020-11/30/2020
Job Name: RI EERMC
Terms: Net 30 Days
PO # 3200362251

Consultant Labor	Job-Phase-Project	Project Description	Rate	Hours	Amount
Dan Mellinger	4104-00-02	Cyclical Planning & Reporting Activities	\$185.00	3.00	\$555.00
Glenn Reed	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	5.75	\$1,121.25
Richard Faesy	4104-00-02	Cyclical Planning & Reporting Activities	\$195.00	4.00	\$780.00
EFG Labor Subtotal:				12.75	\$2,456.25

TOTAL DUE THIS INVOICE: \$2,456.25 USD

Energy Futures Group, Inc.

PO Box 587
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Phone: (802) 482-5001
Fax: (802) 329-2143



Task Description

Invoice #:4354
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 11/1/2020-11/30/2020
Consultant: Dan Mellinger

Date	Phase-Project	Project Description	Hours Task Description
11/2/2020	00-02	Cyclical Planning & Reporting Activities	0.50 Review data, C-team questions, agenda for this weeks C&I sector meeting
11/5/2020	00-02	Cyclical Planning & Reporting Activities	1.50 C&I committee meeting
11/30/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Communications from Adam; review DNV responses to upstream lighting eval, and follow-up emails
TOTAL:			3.00

Energy Futures Group, Inc.

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Task Description

Invoice #:4354
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 11/1/2020-11/30/2020
Consultant: Glenn Reed

Date	Phase-Project	Project Description	Hours	Task Description
11/4/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Regional lighting sales data report, MA HVAC training courses
11/5/2020	00-02	Cyclical Planning & Reporting Activities	2.00	Monthly Res. Sector call
11/14/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Review and distributed comments on October lighting and appliance data
11/17/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Investigation into revived EISA lighting standards, call w/ASAP
11/17/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Review of regional lighting sales data analysis report, revised Consideration
11/18/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Follow up on revived lighting standards
11/19/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Gas demand study
11/19/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Regional lighting sales data report and revived EISA standards
11/20/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Follow up on federal lighting standards and regional lighting sales data analysis
11/23/2020	00-02	Cyclical Planning & Reporting Activities	0.50	RI prep call
11/23/2020	00-02	Cyclical Planning & Reporting Activities	0.25	Follow up w/NMR on regional lighting sales data analysis
11/30/2020	00-02	Cyclical Planning & Reporting Activities	0.50	Final comments on regional sales data report
TOTAL:			5.75	

Energy Futures Group, Inc.

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Task Description

Invoice #:4354
Job Code: 4104
Job Name: RI EERMC
Invoice Period: 11/1/2020-11/30/2020
Consultant: Richard Faesy

Date	Phase-Project	Project Description	Hours Task Description
11/5/2020	00-02	Cyclical Planning & Reporting Activities	2.00 Meeting with N. Grid to review Q3 activity and data
11/9/2020	00-02	Cyclical Planning & Reporting Activities	0.25 Heat pump eval study emails
11/13/2020	00-02	Cyclical Planning & Reporting Activities	1.00 Cadmus heat pump study review report questions, respond
11/23/2020	00-02	Cyclical Planning & Reporting Activities	0.75 Lighting emails, prep for Grid meeting with OEI
TOTAL:			4.00

Margie Lynch/Core Energy Insights, Inc.
111 Hooksett Road, Auburn, NH 03032

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 11-2020*
Invoice Date: *November 30, 2020*
OEI Project #: *7345*

Rhode Island EERMC

Description of Services	Amount
-------------------------	--------

Services Performed 11/01/2020 through 11/30/2020

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	2.50	\$176.00	\$440.00

TOTAL DUE

\$440.00

Margie Lync Core Energy Insights, Inc.

Services Performed 11/01/2020 through 11/30/2020

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
11/5/20	Participated in res sector meeting		2.00				2.00	0.00	2.00
11/23/2020	Participated in C Team meeting		0.50				0.50	0.00	0.50
							0.00	0.00	0.00
	Total hours	0.00	2.50	0.00	0.00	0.00	2.50	0.00	2.50
	Total Amount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.00	\$0.00

Rachel Sholly
48 Hudson Street
Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 35
Invoice Date: *November 30, 2020*
OEI Project #: 7345

Rhode Island EERMC

Description of Services	Amount		
Services Performed 11/01/20 through 11/30/20			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	21.00	\$148.00	\$3,108.00
LABOR - Travel Hours	0.00	\$74.00	\$0.00
Travel Expenses			\$0.00
TOTAL DUE			<u>\$3,108.00</u>

Raciel Solly

Services Performed 11/01/20 through 11/30/20

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stateholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
11/2/2020	Drafted edu call agenda			0.50			0.50		0.50
11/4/2020	NEEP RI state check-in; Edu prep, call & follow-up (sent notes, emailed URI, drafted Chair updates, drafted closing speaker request, updated website)			5.75			5.75		5.75
11/9/2020	Made Council member contact form; Weekly Optimal team scrum; Communications re: lecture series promo			1.50			1.50		1.50
11/17/2020	Communications re: URI lecture prep			0.50			0.50		0.50
11/18/2020	Website planning; URI Energy Lecture #3			2.00			2.00		2.00
11/20/2020	Check-in call w/Mike; Education planning 2021			1.25			1.25		1.25
11/23/2020	Drafted edu call agenda; Optimal weekly scrum & prep; Call w/URI on 2021 partnership			2.25			2.25		2.25
11/27/2020	Sent draft edu agenda; Drafted website survey			1.75			1.75		1.75
11/30/2020	Optimal weekly scrum & prep; Drafted 2021 edu strategy outline; 2021 edu strategy call w/Mike & Adrian; Drafted & sent 2020 edu budget proposal			5.50			5.50		5.50
	Total hours	0.00	0.00	21.00	0.00	0.00	21.00	0.00	21.00
	Total Amount	\$0.00	\$0.00	\$3,100.00	\$0.00	\$0.00	\$3,100.00	\$0.00	\$3,100.00

Invoice



November 30, 2020
Project No: 7345
Invoice No: 7097

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2020
PO #:

Professional Services from November 16, 2020 to November 30, 2020

Phase 004 EERMC Oversight - Education/Stakeholders

Reimbursable Expenses

Misc Reimbursable Expense			
11/30/2020	EERMC website fees - WP Engine	300.00	
	Total Reimbursables	300.00	300.00
		Total this Phase	\$300.00

Billing Limits	Current	Prior	To-Date
Total Billings	300.00	852,145.30	852,445.30
Limit			945,000.00
Remaining			92,554.70
		Total this Invoice	\$300.00

Billings to Date

	Current	Prior	Total
Labor	0.00	644,273.75	644,273.75
Subcontractor	0.00	182,544.25	182,544.25
Expense	300.00	2,600.00	2,900.00
Add-on	0.00	22,727.30	22,727.30
Totals	300.00	852,145.30	852,445.30

If additional information is needed please contact April Clodgo at 802-482-5621 or clodgo@optenergy.com. Federal Tax ID Number: 03-0351557.

Project 7345 Rhode Island EERMC - 2020 Invoice 7097

Billing Backup

Thursday, December 10, 2020

Optimal Energy Inc.

Invoice 7097 Dated 11/30/2020

1:12:41 PM

Phase 004 EERMC Oversight - Education/Stakeholders

Total this Phase \$300.00

Total this Project \$300.00

Total this Report \$300.00



In addition to this print view, you can also use Download Transactions to download a range of transactions in multiple formats.

Statement Ending Nov 11, 2020

Account Ending in ...8646

Search: engine

DATE	DESCRIPTION	CATEGORY	CARD	AMOUNT
Nov 10	WP Engine	Internet	Michael G. ...2798	\$300.00



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

RI Energy Efficiency & Resource Management Council
c/o RI Office of Energy Resources
One Capitol Hill, Providence, RI 02908

INVOICE

Invoice Date of Approval: December 23, 2020

Invoice Date: December 23, 2020

To: Matthew Ray
National Grid 40
Sylvan Road
Waltham, MA 02451

Description: Energy Efficiency and Resource Management Council (EERMC) 2020 end-of-year balance transfer from National Grid to the EERMC client fund held by legal counsel Marisa Desautel.

See attached for detailed budget and expense accounting.

Amount: \$ 156,786.56

2020 SBC - Electric	\$893,700.00
2020 SBC - Gas	\$361,200.00
TOTAL in Main Fund	\$ 1,254,900.00

	Spending by Month												TOTALS
	January	February	March	April	May	June	July	August	September	October	November	December	
Expenses Drawn from Main Fund													
Total Consultant Services	\$ 61,315.25	\$ 84,272.48	\$ 84,880.98	\$ 91,364.98	\$ 77,574.48	\$ 90,849.73	\$ 64,427.48	\$ 82,571.73	\$ 102,836.23	\$ 64,302.48	\$ 48,049.48		\$ 852,445.30
Legal Counsel	\$ 1,760.50	\$ 2,724.50	\$ 6,521.10	\$ 4,216.50	\$ 962.50	\$ 2,190.00	\$ 2,246.47	\$ 5,032.50	\$ 4,950.50	\$ 2,238.66	\$ 7,672.50		\$ 40,515.73
Annual Report	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 956.21	\$ -	\$ -	\$ -	\$ 956.21
Potential Study		\$ 164,196.20	\$ 40,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 204,196.20
Council Travel	\$ -		\$ -				\$ -			\$ -			\$ -
Total Expenses from Main Fund	\$ 63,075.75	\$ 251,193.18	\$ 131,402.08	\$ 95,581.48	\$ 78,536.98	\$ 93,039.73	\$ 66,673.95	\$ 87,604.23	\$ 108,742.94	\$ 66,541.14	\$ 55,721.98	\$ -	\$ 1,098,113.44

Roll Over Total \$ 156,786.56

Invoice



January 31, 2021
Project No: 7395
Invoice No: 7121

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2021

Professional Services from January 1, 2021 to January 31, 2021

Phase	001	EERMC Oversight	-----		
Optimal Staff					
			Hours	Rate	Amount
		Caesar, Adrian	4.75	135.00	641.25
		Guerard, Michael	23.25	198.00	4,603.50
		Johnson, Craig	3.00	186.00	558.00
		Ross, Samuel	21.00	186.00	3,906.00
		Totals	52.00		9,708.75
		Total Labor			9,708.75
Subcontractors					
		Rachel Sholly			2,480.00
		Total Subcontractors			2,480.00
				Total this Phase	\$12,188.75

Phase	002	Dev of Work Products & Rep. of EERMC	-----		
Optimal Staff					
			Hours	Rate	Amount
		Belliveau, Eric	4.25	212.00	901.00
		Guerard, Michael	13.00	198.00	2,574.00
		Johnson, Craig	1.00	186.00	186.00
		Ross, Samuel	1.00	186.00	186.00
		Socks, Matthew	11.75	198.00	2,326.50
		Totals	31.00		6,173.50
		Total Labor			6,173.50

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021	Invoice	7121
			Total this Phase	\$6,173.50

Phase	003	EE & System Reliab. Prog. Design & Deliv			
Optimal Staff					
			Hours	Rate	Amount
		Caesar, Adrian	35.00	135.00	4,725.00
		Guerard, Michael	22.00	198.00	4,356.00
		Jacobs, Adam	16.00	186.00	2,976.00
		Johnson, Craig	33.75	186.00	6,277.50
		Ross, Samuel	36.75	186.00	6,835.50
		Totals	143.50		25,170.00
		Total Labor			25,170.00
			Total this Phase		\$25,170.00

Phase	004	Adv Integ Approaches & Emerging Issues			
Optimal Staff					
			Hours	Rate	Amount
		Guerard, Michael	2.00	198.00	396.00
		Totals	2.00		396.00
		Total Labor			396.00
			Total this Phase		\$396.00

Billing Limits	Current	Prior	To-Date	
Total Billings	43,928.25	0.00	43,928.25	
Limit			631,263.00	
Remaining			587,334.75	
			Total this Invoice	\$43,928.25

Billings to Date	Current	Prior	Total
Labor	41,448.25	0.00	41,448.25
Subcontractor	2,480.00	0.00	2,480.00
Totals	43,928.25	0.00	43,928.25

Project 7395 Rhode Island EERMC - 2021 Invoice 7121

Billing Backup

Friday, February 26, 2021

Optimal Energy Inc.

Invoice 7121 Dated 1/31/2021

3:59:32 PM

Phase 001 EERMC Oversight

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian	1/11/2021	EERMC website survey results review	.25	135.00	33.75
Caesar, Adrian	1/12/2021	EERMC website design review and feedback - CT/MA website comps, RI EM&V study processing review, C&I commitments tracking discussion and studies update	1.25	135.00	168.75
Caesar, Adrian	1/14/2021	EMV studies and 2021 EERMC meeting calendar upload	.50	135.00	67.50
Caesar, Adrian	1/15/2021	EERMC January mtg material upload	.50	135.00	67.50
Caesar, Adrian	1/20/2021	EERMC January meeting materials upload	.25	135.00	33.75
Caesar, Adrian	1/21/2021	EERMC January mtg materials review	.25	135.00	33.75
Caesar, Adrian	1/22/2021	EM&V studies upload/Evaluation studies pages update	.50	135.00	67.50
Caesar, Adrian	1/29/2021	EERMC Website improvements strategy prep - survey results review and initial workplan outline, EERMC Council page updates	1.25	135.00	168.75
Guerard, Michael	1/4/2021	OER/Div/C-T bi-weekly, follow-up tasks	1.75	198.00	346.50
Guerard, Michael	1/6/2021	Educ. Wkg grp meeting	1.00	198.00	198.00
Guerard, Michael	1/8/2021	Chk-in call with OER/Grid, follow-up tasks; debriefs w team	2.50	198.00	495.00
Guerard, Michael	1/12/2021	Prep for EERMC mtg; draft materials, team discussions	3.50	198.00	693.00
Guerard, Michael	1/13/2021	discussions on PUC rulings; prep memo; draft EERMC mtg materials	3.25	198.00	643.50
Guerard, Michael	1/14/2021	Finalize and submit 4 EERMC presentations-memo	4.25	198.00	841.50
Guerard, Michael	1/19/2021	OER/Div/C-T chk-in; OER/Grid/C-T chk-in, debriefs; EERMC mtg prep	3.25	198.00	643.50
Guerard, Michael	1/20/2021	EERMC mtg prep; respond to T.Hubbard inquiry	1.00	198.00	198.00
Guerard, Michael	1/28/2021	Follow-up on Q from H.Webster/Acadia	.50	198.00	99.00
Guerard, Michael	1/29/2021	Int. Lead proj. man call; mtg on website updates w RS, AC	2.25	198.00	445.50

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7121
Johnson, Craig		1/12/2021	1.50	186.00		279.00
		Review 2021 EERMC calendar updates from Grid, discuss updates w/ Mike. Review suggested edits from Becca. Finalize presentation.				
Johnson, Craig		1/13/2021	1.50	186.00		279.00
		Check-in w/ Mike on 2021 EERMC calendar updates presentation. Finalize and deliver presentation. Review content for PUC Ruling presentation w/ Mike.				
Ross, Samuel		1/5/2021	2.00	186.00		372.00
		reviewing updated process docs and trackers for 2021 C-Team work plan				
Ross, Samuel		1/6/2021	2.50	186.00		465.00
		SRP presentation content outline development				
Ross, Samuel		1/7/2021	2.75	186.00		511.50
		2021 trackers and meeting series coordination; SRP content finalization and distribution to NGrid, OER, DPUC				
Ross, Samuel		1/13/2021	7.25	186.00		1,348.50
		Review of all 2021 Annual Plan EM&V text for commitments tracker; development of SRP slides from existing outline, internal review and iteration re: same, distribution to other stakeholders, scheduling follow-up mtg with NGrid				
Ross, Samuel		1/14/2021	5.00	186.00		930.00
		SRP presentation meeting with NGrid, prep re: same; SRP slide finalization; review and edits to other Council materials;				
Ross, Samuel		1/21/2021	1.50	186.00		279.00
		EERMC Council mtg prep, presentation				
		Totals	52.00			9,708.75
		Total Labor				9,708.75
					Total this Phase	\$12,188.75

Phase 002 Dev of Work Products & Rep. of EERMC

Optimal Staff

			Hours	Rate	Amount
Belliveau, Eric		1/22/2021	1.75	212.00	371.00
		project planning with team, discuss PIMs and review of PUC slides			
Belliveau, Eric		1/28/2021	1.50	212.00	318.00
		pims call to prep for PUC meeting, review analysis, and recreate PUC for sensitivity analysis.			
Belliveau, Eric		1/29/2021	1.00	212.00	212.00
		team check in on policy including PIMs, EMV update and connectino to MA for cost considerations.			
Guerard, Michael		1/5/2021	2.25	198.00	445.50
		Coord mtg w Grid; draft PUC updates			
Guerard, Michael		1/7/2021	1.75	198.00	346.50
		Review PUC ruling livestream, draft 1-1 email for council members			
Guerard, Michael		1/8/2021	2.00	198.00	396.00
		Finalize/send 1-1 emails to EERMC			
Guerard, Michael		1/13/2021	1.25	198.00	247.50
		Coord subs, team updates			
Guerard, Michael		1/21/2021	4.75	198.00	940.50
		EERMC meeting, prep and debriefs			

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7121
Guerard, Michael		1/22/2021	1.00	198.00	198.00	
		Leads coordination meeting				
Johnson, Craig		1/5/2021	.25	186.00	46.50	
		Check-in w/ Jen A. about upcoming MF brainstorming session and ability to review agenda in advance.				
Johnson, Craig		1/7/2021	.25	186.00	46.50	
		Check-in w/ Jen on status of MF brainstorming agenda.				
Johnson, Craig		1/11/2021	.25	186.00	46.50	
		Monitor e-mails on upcoming MF brainstorming session and Equity Working				
Johnson, Craig		1/12/2021	.25	186.00	46.50	
		Monitor e-mail traffic on MF brainstorming meeting agenda.				
Ross, Samuel		1/22/2021	1.00	186.00	186.00	
		proj mgmt & coord internal mtg				
Socks, Matthew		1/6/2021	1.00	198.00	198.00	
		AESC check-in meeting w/ B. Trietch/prep				
Socks, Matthew		1/7/2021	1.00	198.00	198.00	
		Participating in AESC 2021 Study Group mtg; associated prep				
Socks, Matthew		1/11/2021	1.00	198.00	198.00	
		AESC 2021, climate sensitivity background research				
Socks, Matthew		1/12/2021	2.00	198.00	396.00	
		AESC 2021, climate sensitivity background research				
Socks, Matthew		1/13/2021	1.50	198.00	297.00	
		Reviewing AESC 2021 straw proposal; RI climate priorities research				
Socks, Matthew		1/19/2021	1.25	198.00	247.50	
		Reviewing latest AESC documents/sensitivities; correspondence with Synapse re: outstanding questions				
Socks, Matthew		1/20/2021	1.25	198.00	247.50	
		AESC check-in meeting w/ B. Trietch/prep				
Socks, Matthew		1/25/2021	1.75	198.00	346.50	
		Reviewing AESC 2021 DRIPE data and draft SCC research and recommendations text				
Socks, Matthew		1/26/2021	1.00	198.00	198.00	
		Reviewing AESC 2021 DRIPE data and draft SCC research and recommendations text				
		Totals	31.00		6,173.50	
		Total Labor				6,173.50
				Total this Phase		\$6,173.50

Phase 003 EE & System Reliab. Prog. Design & Deliv

Optimal Staff

		Hours	Rate	Amount
Caesar, Adrian	1/4/2021	4.25	135.00	573.75
	Monthly/Quarterly data reporting infrastructure improvements, Res reporting template finalization			

Project	7395	Rhode Island EERMC - 2021			Invoice	7121
Caesar, Adrian		1/5/2021	3.75	135.00		506.25
		C&I november data report, Data reporting workbook improvements and sector team strategy discussion, NGrid 2021 Plan commitments review				
Caesar, Adrian		1/7/2021	2.25	135.00		303.75
		2021 C-Team internal strategy kickoff mtg. and prep				
Caesar, Adrian		1/8/2021	4.75	135.00		641.25
		C&I monthly/quarterly reporting workbook development - enduse and project-level tracking				
Caesar, Adrian		1/11/2021	3.25	135.00		438.75
		C&I and Res monthly/quarterly data reporting workbook improvements				
Caesar, Adrian		1/13/2021	6.50	135.00		877.50
		C&I Data reporting strategy check in, C&I/Res monthly/quarterly data reporting improvements				
Caesar, Adrian		1/14/2021	3.00	135.00		405.00
		C&I/Res monthly/quarterly data reporting improvements				
Caesar, Adrian		1/15/2021	.50	135.00		67.50
		C&I monthly/quarterly data reporting improvements				
Caesar, Adrian		1/21/2021	.50	135.00		67.50
		C&I monthly/quarterly data reporting edits				
Caesar, Adrian		1/22/2021	2.50	135.00		337.50
		RI project management check-in, 2021 implementation oversight check-in with Becca, meeting notetaking for follow-up, Outreach to NGrid re: measure-level electric C&I lifetime savings data reporting				
Caesar, Adrian		1/26/2021	1.50	135.00		202.50
		RI 2020 Upstream Lighting Data review for 2021 reporting planning				
Caesar, Adrian		1/29/2021	2.25	135.00		303.75
		Weekly RI project mgmt check-in - discussion of sector team strategy, commitments tracking, PIMs, December 2020 Res Data report initial processing, Grid Data request - VHEA vs. In-person audit data,				
Guerard, Michael		1/4/2021	1.25	198.00		247.50
		Follow-up with RS on ED group members, tasks; review website survey				
Guerard, Michael		1/6/2021	.75	198.00		148.50
		EMV debriefs, review upcoming activities				
Guerard, Michael		1/7/2021	2.50	198.00		495.00
		2021 planning - systems, protocol and process dev for sector, SRP and EMV groups				
Guerard, Michael		1/11/2021	1.75	198.00		346.50
		Respond to data issue from Jenn K; prep/coord upcoming mtgs - DR PIM, MF, Monthly Sector				
Guerard, Michael		1/13/2021	1.50	198.00		297.00
		Review Trackers, commitments				
Guerard, Michael		1/14/2021	2.25	198.00		445.50
		MF mtgh, prep and debriefs				
Guerard, Michael		1/20/2021	2.25	198.00		445.50
		Prep for Sector kick-off mtg - finalize/send agenda, review trackers; coord w team				
Guerard, Michael		1/21/2021	.50	198.00		99.00
		Debrief and next steps on DR PIMs				
Guerard, Michael		1/22/2021	1.25	198.00		247.50
		Review Implantation Oversight Trackers with OER/Becca, prep and debriefs				

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7121
Guerard, Michael		1/27/2021	3.50	198.00		693.00
		Sector kick-off mtg w Grid, OER, Div; prep and debriefs; updates w subs; updates on EMV chk-in call; coord w Marisa on C-Team participation				
Guerard, Michael		1/28/2021	2.25	198.00		445.50
		Call w sector leads to set mtg agendas; review compliance filing from Grid; PIM tech session prep, coord team				
Guerard, Michael		1/29/2021	2.25	198.00		445.50
		PUC PIM tech session - review agenda, prep, analysis; Review C&I data from Ben/Grid				
Jacobs, Adam		1/4/2021	.25	186.00		46.50
		-1/2 daily scrum check-in on PUC updates (PIMs, budget caps)				
Jacobs, Adam		1/5/2021	.25	186.00		46.50
		-follow-up w/ Grid regarding Nov/Dec 2020 C&I data reports				
Jacobs, Adam		1/6/2021	1.00	186.00		186.00
		-EM&V Coordination - RI C&I + MA integration call w/ Sam -review C&I November Data Report -commitment tracker review				
Jacobs, Adam		1/7/2021	2.00	186.00		372.00
		-2021 internal team kickoff -C&I data tracker updates				
Jacobs, Adam		1/8/2021	.50	186.00		93.00
		-subcontractor coordination for 2021 work -work on visualization structure for monthly C&I data reports				
Jacobs, Adam		1/12/2021	.25	186.00		46.50
		-C&I data tracking/commitments - small biz lighting controls goal -1/2 RI daily scrum - commitment tracking				
Jacobs, Adam		1/13/2021	2.75	186.00		511.50
		-RI daily scrum -RI C&I data reporting check-in -suggested tracking methods for NGrid C&I 2021 commitments -review draft C&I Reporting Workbook				
Jacobs, Adam		1/14/2021	.50	186.00		93.00
		-review Updated C&I Reporting Workbook/dashboard -check-in on Upstream lighting w/ Dan/George				
Jacobs, Adam		1/15/2021	.25	186.00		46.50
		-review updated C&I data report and propose final revisions				
Jacobs, Adam		1/19/2021	.25	186.00		46.50
		-review RI cross-sector updates from Mike				
Jacobs, Adam		1/20/2021	1.00	186.00		186.00
		-RI daily scrum -Agenda Setting for RI Sector Team Kickoff -Demand Response PIMs prep				
Jacobs, Adam		1/21/2021	1.25	186.00		232.50
		-prep for Demand Response PIM Discussions -DR PIMs discussion w/ NGrid/OER -draft timing/sequence of data sharing/Q&A for sector team calls -notes/follow-ups from DR PIMs call				
Jacobs, Adam		1/22/2021	1.25	186.00		232.50
		-RI monthly data transfer process development -RI Project Management Meeting				
Jacobs, Adam		1/25/2021	.25	186.00		46.50

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Project	7395	Rhode Island EERMC - 2021		Invoice	7121
		-C&I Lifetime Electric Savings Data - Installed Measures Sheet			
Jacobs, Adam		1/26/2021	.50	186.00	93.00
		-follow-ups on PUC hearing workforce funding decisions			
		-C&I lighting data/lighting subgroup planning			
Jacobs, Adam		1/27/2021	1.50	186.00	279.00
		-RI 2021 Sector Kick-off meeting + internal debrief			
Jacobs, Adam		1/28/2021	1.00	186.00	186.00
		-RI sector team agendas and meeting organization			
		-check-in w/ Craig and Mike on sector calls			
Jacobs, Adam		1/29/2021	1.25	186.00	232.50
		-reschedule RI C&I sector team call for February			
		-RI Project Management Meeting			
Johnson, Craig		1/4/2021	.75	186.00	139.50
		Review redline document on final strategic electrification report, emails about the same. Prep/schedule internal team kickoff meeting.			
Johnson, Craig		1/5/2021	5.75	186.00	1,069.50
		Clean-up draft of implementation and oversight tracker, emails about the same. Check-in/review data reporting infrastructure updates w/ Adrian. Check-in w/ Mike regarding data requests that came out of C-Team/OER/Division check-in. Review Custom Gas 1 pager. Review final version of C&I FRSO study. Review final version of Heating Electrification study. Discussion w/ Sam about the same.			
Johnson, Craig		1/6/2021	1.00	186.00	186.00
		Prep for 2021 internal team kickoff meeting.			
Johnson, Craig		1/7/2021	2.00	186.00	372.00
		2021 internal team kickoff to review tracker and data reporting documents.			
Johnson, Craig		1/11/2021	2.50	186.00	465.00
		2021 strategy team planning meeting with Mike. Plan/prep for 2021 strategy team planning meeting. Review and make updates to commitment tracker. Follow-up on status of December data and in-home vs. virtual audit data.			
Johnson, Craig		1/12/2021	2.50	186.00	465.00
		Updates to tracking document format. Develop proxy metrics for C&I items. Prep for meeting w/ Becca to preview tracking documents.			
Johnson, Craig		1/13/2021	6.25	186.00	1,162.50
		Add pilots/demos and main text items to commitment tracker. Review Res and C&I data reporting infrastructure.			
Johnson, Craig		1/18/2021	.25	186.00	46.50
		Review/check-in on comments on 2018 Custom Gas study to see if we ever received final version.			
Johnson, Craig		1/19/2021	.25	186.00	46.50
		Coordinate rescheduling of meeting w/ Becca to review Data Tracking/Reporting infrastructure.			
Johnson, Craig		1/20/2021	1.00	186.00	186.00
		Coordinate w/ Mike and Adam on agenda for next week sector team kickoff meeting.			
Johnson, Craig		1/21/2021	1.25	186.00	232.50
		Finalize agenda for sector strategy team kickoff meeting. Develop data sharing cadence proposal for sector strategy teams. Update implementation and oversight tracker.			
Johnson, Craig		1/22/2021	2.50	186.00	465.00

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Project	7395	Rhode Island EERMC - 2021			Invoice	7121
		RI Project Management Team Coordination Meeting. Meeting w/ Becca to review implementation and oversight tracker, updated monthly reports, and data sharing cadence, meeting prep.				
Johnson, Craig		1/25/2021	2.00	186.00		372.00
		Edits to implementation and oversight tracker. Edits to data sharing/sector team meeting cadence. Distribute meeting materials for sector team kickoff call.				
Johnson, Craig		1/27/2021	3.00	186.00		558.00
		Sector team kickoff call. Meeting prep and debrief.				
Johnson, Craig		1/28/2021	1.50	186.00		279.00
		Coordinate w/ Adam on meeting invites and agendas for sector team calls. Draft meeting agenda for next sector team call. Prep meeting materials.				
Johnson, Craig		1/29/2021	1.25	186.00		232.50
		RI Project Management Team Coordination Meeting. Coordinate on rescheduling February res sector team meeting.				
Ross, Samuel		1/3/2021	1.50	186.00		279.00
		catching up on PUC rulings, stakeholder input				
Ross, Samuel		1/4/2021	3.25	186.00		604.50
		catching up on PUC rulings and next steps; begin catching up on EM&V				
Ross, Samuel		1/5/2021	1.50	186.00		279.00
		continued EM&V review & prep for 2021 kick-off mtg on 1/5				
Ross, Samuel		1/6/2021	4.50	186.00		837.00
		EM&V kick-off meeting, prep and follow-ups re: same incl. study review, coordination with OER, and C-Team task planning/distribution				
Ross, Samuel		1/7/2021	1.50	186.00		279.00
		continued EM&V follow-ups and correspondence re: same				
Ross, Samuel		1/8/2021	.75	186.00		139.50
		consolidate & distribute EM&V deliverables back to NGrid team				
Ross, Samuel		1/12/2021	3.25	186.00		604.50
		EM&V follow-up correspondence with OER, C-Team, review of deliverables and call-in options for meeting series				
Ross, Samuel		1/14/2021	1.25	186.00		232.50
		SRP presentation meeting with NGrid, prep re: same				
Ross, Samuel		1/15/2021	1.75	186.00		325.50
		Gas Peak Demand comment review and distribution				
Ross, Samuel		1/18/2021	.25	186.00		46.50
		correspondence w/Grid team				
Ross, Samuel		1/19/2021	.75	186.00		139.50
		C-Team check-in debrief, SRP follow-ups				
Ross, Samuel		1/20/2021	3.00	186.00		558.00
		SRP TWG, prep and follow-up re:same				
Ross, Samuel		1/21/2021	1.00	186.00		186.00
		mtg re: MA EMV study review for RI relevance				
Ross, Samuel		1/22/2021	2.50	186.00		465.00
		EM&V agenda, meeting invite updates, final review and approval of FRSO, Gas documents				
Ross, Samuel		1/25/2021	.75	186.00		139.50
		correspondence & check-ins re: various EM&V tasks				
Ross, Samuel		1/27/2021	1.75	186.00		325.50
		Res EM&V meeting, follow ups re: same				

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Project	7395	Rhode Island EERMC - 2021			Invoice	7121
Ross, Samuel		1/28/2021	3.50	186.00	651.00	
		PIM review, mtg, analysis re: same				
Ross, Samuel		1/29/2021	4.00	186.00	744.00	
		ex ante study review; correspondence w/NGrid team, distributing docs for review; PIMs analysis, proj mgmt team mtg				
		Totals	143.50		25,170.00	
		Total Labor				25,170.00
					Total this Phase	\$25,170.00
<hr style="border-top: 1px dashed black;"/>						
Phase	004	Adv Integ Approaches & Emerging Issues				
Optimal Staff			Hours	Rate	Amount	
Guerard, Michael		1/5/2021	1.50	198.00	297.00	
		Review EE legislation, send MA example to OER, review other jurisdiction law updates				
Guerard, Michael		1/22/2021	.50	198.00	99.00	
		Review federal climate plan draft, equity focus				
		Totals	2.00		396.00	
		Total Labor				396.00
					Total this Phase	\$396.00
					Total this Project	\$43,928.25
					Total this Report	\$43,928.25

Rachel Sholly Energy Consulting
48 Hudson St. Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 37
Invoice Date: *January 31, 2021*
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services	Amount		
Services Performed 01/01/21 through 01/31/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	16.00	\$155.00	\$2,480.00
LABOR - Travel Hours	0.00	\$77.50	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$2,000.00</u>

Raciel Solly Energy Consulting
Services Performed 01/01/21 through 01/31/21

Date	Description of Services	001 - EERMC Oversight	002 - Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular Hrs.	Sub-Total Travel Hrs.	Total Hrs.
1/4/21	Optimal weekly scrum w/prep; Call w/Mike; Communications w/edu members	1.75					1.75	0.00	1.75
1/5/21	Sent agenda, materials & new calendar invites to edu group	0.25					0.25	0.00	0.25
1/6/21	Edu mtg prep; Edu mtg & notes/follow-up	3.00					3.00	0.00	3.00
1/8/21	Forwarded OER proposal to edu group	0.25					0.25	0.00	0.25
1/12/21	Optimal weekly scrum w/prep	0.75					0.75	0.00	0.75
1/14/21	Drafted 1 edu bullets for c-team slides	0.50					0.50	0.00	0.50
1/15/21	Communications re: NEED presentation & EERMC website survey; Reviewed energy fellow proposal	2.00					2.00	0.00	2.00
1/21/21	Optimal weekly scrum; Reviewed C-team memo on PUC hearings; EERMC mtg - presented edu 1 activities	2.00					2.00	0.00	2.00
1/27/21	Forwarded video RFP; Drafted edu agenda & sent for review; Emailed NEED	2.25					2.25	0.00	2.25
1/28/21	Optimal weekly scrum	0.75					0.75	0.00	0.75
1/29/21	Website planning & mtg	2.50					2.50	0.00	2.50
							0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total Hrs	16.00	0.00	0.00	0.00	0.00	16.00	0.00	16.00
	Total Amount	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,000.00	0.00	\$2,000.00

Invoice



February 28, 2021
Project No: 7395
Invoice No: 7134

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2021

Professional Services from February 1, 2021 to February 28, 2021

Phase 001 EERMC Oversight

Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	1.75	135.00	236.25	
Guerard, Michael	45.25	198.00	8,959.50	
Johnson, Craig	10.25	186.00	1,906.50	
Ross, Samuel	20.25	186.00	3,766.50	
Totals	77.50		14,868.75	
Total Labor				14,868.75

Subcontractors

Rachel Sholly			2,325.00	
EcoMetric Consulting, LLC			2,764.00	
Ralph Prah			3,564.00	
Total Subcontractors			8,653.00	8,653.00

Total this Phase \$23,521.75

Phase 002 Dev of Work Products & Rep. of EERMC

Optimal Staff

	Hours	Rate	Amount	
Belliveau, Eric	9.50	212.00	2,014.00	
Guerard, Michael	.75	198.00	148.50	
Socks, Matthew	8.50	198.00	1,683.00	
Totals	18.75		3,845.50	
Total Labor				3,845.50

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Project	7395	Rhode Island EERMC - 2021	Invoice	7134
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Subcontractors

Core Energy Insights Inc.	186.00		
Rachel Sholly	387.50		
Total Subcontractors	573.50		573.50
		Total this Phase	\$4,419.00

Phase	003	EE & System Reliab. Prog. Design & Deliv
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Optimal Staff

	Hours	Rate	Amount
Caesar, Adrian	25.00	135.00	3,375.00
Guerard, Michael	21.75	198.00	4,306.50
Jacobs, Adam	11.00	186.00	2,046.00
Johnson, Craig	18.50	186.00	3,441.00
Ross, Samuel	55.00	186.00	10,230.00
Totals	131.25		23,398.50
Total Labor			23,398.50

Subcontractors

Rachel Sholly	775.00		
Energy Futures Group, Inc.	1,584.00		
Total Subcontractors	2,359.00		2,359.00
		Total this Phase	\$25,757.50

Phase	004	Adv Integ Approaches & Emerging Issues
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Optimal Staff

	Hours	Rate	Amount
Guerard, Michael	.75	198.00	148.50
Totals	.75		148.50
Total Labor			148.50
		Total this Phase	\$148.50

Billing Limits

	Current	Prior	To-Date
Total Billings	53,846.75	43,928.25	97,775.00
Limit			631,263.00
Remaining			533,488.00
		Total this Invoice	\$53,846.75

Billings to Date

	Current	Prior	Total
Labor	42,261.25	41,448.25	83,709.50
Subcontractor	11,585.50	2,480.00	14,065.50
Totals	53,846.75	43,928.25	97,775.00

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Project	7395	Rhode Island EERMC - 2021	Invoice	7134
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Project 7395 Rhode Island EERMC - 2021 Invoice 7134

Billing Backup

Wednesday, March 17, 2021

Optimal Energy Inc.

Invoice 7134 Dated 2/28/2021

4:37:06 PM

Phase 001 EERMC Oversight

Optimal Staff

		Hours	Rate	Amount
Caesar, Adrian	2/2/2021	.50	135.00	67.50
	EERMC website event updates for new RFP - PIER lectures and public forums			
Caesar, Adrian	2/8/2021	.25	135.00	33.75
	EERMC website - updated navigation and content outline			
Caesar, Adrian	2/11/2021	.25	135.00	33.75
	EERMC february mtg materials and EM&V studies upload			
Caesar, Adrian	2/12/2021	.50	135.00	67.50
	February EERMC meeting material and NGrid 2020 Q4 report upload			
Caesar, Adrian	2/16/2021	.25	135.00	33.75
	February EERMC mtg material upload and RFP page update			
Guerard, Michael	2/1/2021	2.25	198.00	445.50
	OER/Div/C-T bi-weekly chk-in, follow-up tasks			
Guerard, Michael	2/2/2021	1.75	198.00	346.50
	Chk-in call w OER/Grid, prep and follow-up tasks; cord w Marisa on PUC mtg			
Guerard, Michael	2/4/2021	3.00	198.00	594.00
	PUC PIM mtg debriefs, prep			
Guerard, Michael	2/5/2021	5.25	198.00	1,039.50
	Call w RS on Priorities PPT; Leads mangmnt call; updates on PIMs			
Guerard, Michael	2/8/2021	2.25	198.00	445.50
	PIM ppt mtg w SR; sched PPT development needs w team			
Guerard, Michael	2/10/2021	6.00	198.00	1,188.00
	EERMC materials prep; coord upcoming mtgs; follow-up w BT on EERMC agenda; coord on PIMs w EB/SR			
Guerard, Michael	2/11/2021	4.75	198.00	940.50
	EERMC materials finalize/send; prep for mtgs; team debriefs			
Guerard, Michael	2/12/2021	3.75	198.00	742.50
	Team Leads call; call w Hank/Acadia on PIMs, PUC, EE updates; assemble C&S info for Peter Case			
Guerard, Michael	2/15/2021	1.50	198.00	297.00
	EERMC mtg prep; update on legislation w Becca/OER			
Guerard, Michael	2/16/2021	3.75	198.00	742.50
	Chk-in w OER/Grid; PUC Procedural hearing call; PIM review w EB/SR; EERMC mtg prep			
Guerard, Michael	2/17/2021	1.50	198.00	297.00
	PIM and Priority follow-ups; final EERMC coord w team			
Guerard, Michael	2/18/2021	4.75	198.00	940.50
	EERMC mtg, prep and debriefs			
Guerard, Michael	2/19/2021	.50	198.00	99.00
	Team Leads weekly check-in			

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Project	7395	Rhode Island EERMC - 2021			Invoice	7134
Guerard, Michael		2/24/2021	2.75	198.00		544.50
		Chk in w Marisa on PUC, filing dates; chk-in w Becca/Sam, incl PIM wkshp prep; work on EERMC priorities				
Guerard, Michael		2/26/2021	1.50	198.00		297.00
		Leads management mtg; chk-in call w MRay/Grid				
Johnson, Craig		2/3/2021	.75	186.00		139.50
		Q4/Preliminary Year-End Presentation for Council - Brainstorm content to include, discuss with internal team. Discuss presentation needs for February Council meeting w/ internal team.				
Johnson, Craig		2/4/2021	.25	186.00		46.50
		Coordinate with internal team on development of Q4/Preliminary Year-End presentation for Council meeting.				
Johnson, Craig		2/5/2021	.50	186.00		93.00
		RI Project Management Meeting - coordinate on deliverables for February Council meeting.				
Johnson, Craig		2/9/2021	.25	186.00		46.50
		Coordinate with internal team on Council meeting materials.				
Johnson, Craig		2/10/2021	.25	186.00		46.50
		Coordinate with internal team on Council meeting materials.				
Johnson, Craig		2/11/2021	5.25	186.00		976.50
		Develop content and slides for Q4/Year-end report council presentation. Review and discuss w/ Mike.				
Johnson, Craig		2/18/2021	3.00	186.00		558.00
		Council Meeting, Council meeting prep.				
Ross, Samuel		2/5/2021	1.00	186.00		186.00
		OER SRP Comments review; initial prep on Council comments				
Ross, Samuel		2/8/2021	3.50	186.00		651.00
		SRP Comments - initial drafting; PIM presentation initial disc.				
Ross, Samuel		2/9/2021	1.50	186.00		279.00
		SRP Memo first draft finalization and distribution				
Ross, Samuel		2/10/2021	4.00	186.00		744.00
		Further interaction on SRP comments, planning out PIM presentation approach given timeline complications; initial PIM slide outlining; initial SRP priorities discussions				
Ross, Samuel		2/11/2021	4.75	186.00		883.50
		Finalizing SRP comments, PIM presentation; priorities presentation contribution				
Ross, Samuel		2/18/2021	5.50	186.00		1,023.00
		EERMC mtg, updated PIM slides, analysis supporting same				
		Totals	77.50			14,868.75
		Total Labor				14,868.75
					Total this Phase	\$23,521.75

Phase	002	Dev of Work Products & Rep. of EERMC			
Optimal Staff					
			Hours	Rate	Amount
Belliveau, Eric		2/2/2021	1.50	212.00	318.00

Project	7395	Rhode Island EERMC - 2021		Invoice	7134
		Pims call, disc with MG, review calculations			
Belliveau, Eric		2/4/2021	3.50	212.00	742.00
		PIM tech session, prep			
Belliveau, Eric		2/5/2021	1.00	212.00	212.00
		team check in and prep			
Belliveau, Eric		2/8/2021	.50	212.00	106.00
		pims discussion with Sam R, review PUC information			
Belliveau, Eric		2/16/2021	1.00	212.00	212.00
		PIMS call, review PUC draft, disc with SR			
Belliveau, Eric		2/19/2021	1.00	212.00	212.00
		team check in, disc with MG on proj management			
Belliveau, Eric		2/26/2021	1.00	212.00	212.00
		RI project call - PI discussion, plan changes based on new direction from PUC, team agendas for coordinating CI and res			
Guerard, Michael		2/2/2021	.75	198.00	148.50
		chk in on Annual report			
Socks, Matthew		2/3/2021	1.00	198.00	198.00
		Checking in on AESC w/ B.Trietch			
Socks, Matthew		2/4/2021	1.00	198.00	198.00
		Participating in AESC 2021 Study Group call and associated prep			
Socks, Matthew		2/5/2021	1.75	198.00	346.50
		Soliciting feedback on RI renewable policy assumptions in 2021 AESC; sending summary to Synapse			
Socks, Matthew		2/15/2021	.50	198.00	99.00
		Following up w/ Synapse re: additional RI renewable policy comments for 2021 AESC			
Socks, Matthew		2/16/2021	1.25	198.00	247.50
		Reviewing AESC 2021 Spring update materials/developing comments			
Socks, Matthew		2/22/2021	1.50	198.00	297.00
		Reviewing revised social cost of carbon content in AESC 2021			
Socks, Matthew		2/26/2021	1.50	198.00	297.00
		Initial review of AESC 2021 Fifth Draft Report			
		Totals	18.75		3,845.50
		Total Labor			3,845.50
				Total this Phase	\$4,419.00

Phase 003 EE & System Reliab. Prog. Design & Deliv

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian		2/1/2021	4.00	135.00	540.00
		2020 preliminary year-end C&I data review, December C&I data report processing - new 2021 reporting template incl. end use analysis by program, top savings projects, and performance charts by program			
Caesar, Adrian		2/2/2021	3.00	135.00	405.00
		December 2020 Res data report update with detailed NGrid data, December 2020 Res/C&I data report review			

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Project	7395	Rhode Island EERMC - 2021			Invoice	7134
Caesar, Adrian		2/3/2021	1.00	135.00		135.00
		2020 preliminary year-end results presentation planning, 2020 year-end data reports review and distribution to sector team members				
Caesar, Adrian		2/5/2021	1.00	135.00		135.00
		Weekly RI project mgmt check-in re: PUC tech session on PIMs, updated 2021 BC models/2021 reporting, Q4/Year-end report and presentation, Res and C&I sector team planning				
Caesar, Adrian		2/9/2021	2.00	135.00		270.00
		Updated preliminary NGrid 2020 year-end data review, 2020 Q4 presentation for EERMC february mtg				
Caesar, Adrian		2/11/2021	5.25	135.00		708.75
		Res and C&I Sector team prep, meeting, notetaking, and action items/follow-ups, January Res/C&I data report - new 2021 template				
Caesar, Adrian		2/12/2021	2.25	135.00		303.75
		RI Project mgmt check-in re: Res and C&I sector team meeting debrief, oversight tracking strategy, monthly/quarterly data sharing caadence reminders, January Res data report - BC model update				
Caesar, Adrian		2/16/2021	5.25	135.00		708.75
		New 2021 BC model and C&I data through January updates, C&I and Res January data reports, check-in re: January data report review and data sharing schedule for 2021, January data report distribution				
Caesar, Adrian		2/19/2021	.50	135.00		67.50
		RI project management check-in re: Sector team strategy, commitments and data reporting tracking				
Caesar, Adrian		2/26/2021	.75	135.00		101.25
		RI project mgmt meeting re: sector team updates, oversight tracking, EM&V planning, PIMs and LCP update				
Guerard, Michael		2/2/2021	5.25	198.00		1,039.50
		PUC PIM discussion w Grid/OER/Div; team prep and debriefs; updates on sector work, data review; source send data to JKalay				
Guerard, Michael		2/8/2021	2.25	198.00		445.50
		Planning for Feb oversight objectives; coord w team, subs				
Guerard, Michael		2/11/2021	1.75	198.00		346.50
		Debriefs on Sector calls; review data, next steps				
Guerard, Michael		2/15/2021	4.25	198.00		841.50
		PUC Open mtg; follow-call w OER/Div; debriefs and analysis w team; coord w Marisa				
Guerard, Michael		2/22/2021	1.75	198.00		346.50
		sector data review; commitments tracker updates				
Guerard, Michael		2/24/2021	1.75	198.00		346.50
		Update w team on sector deliverable, timelines; review tracker				
Guerard, Michael		2/25/2021	4.75	198.00		940.50
		EE TWG mtg, debrief w CI team; PIM PUC workshop, prep and follow-up review; chk on sector mtg prep - data, tracker; review 3 surveys from Grid, coord w team, submit to Rodormer/Grid				
Jacobs, Adam		2/1/2021	1.00	186.00		186.00
		-RI CI subcontract review -Providence Business News C&I stakeholder complaints -review December 2020 C&I data report -update Jan timesheet to reflect new contract tasks				
Jacobs, Adam		2/2/2021	.75	186.00		139.50

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7134
		-1/2 RI daily scrum on subcontractor work-orders -review December 2020 C&I data report in new template and provide feedback to Adrian -check-in on lifetime savings data and mapping for monthly data reports				
Jacobs, Adam		2/3/2021	.75	186.00		139.50
		-1/2 RI Daily scrum -Internal Check-in on RI Subs Q1 Tasks				
Jacobs, Adam		2/4/2021	.25	186.00		46.50
		-sub-A SOWs				
Jacobs, Adam		2/5/2021	1.00	186.00		186.00
		-follow-up on SEM demo eval -RI project management meeting -note to Dan RE: small biz lighting controls tracking mechanism				
Jacobs, Adam		2/8/2021	.75	186.00		139.50
		-subcontractor work plans for 2021 -reminder to NGrid staff on sector team meeting homework/review of committment tracker				
Jacobs, Adam		2/9/2021	1.00	186.00		186.00
		-1/2 RI daily scrum PIMs and sector team discussions -2021 RI Res Implementation Oversight Process & Q1 Tasks call w/ EFG				
Jacobs, Adam		2/10/2021	.25	186.00		46.50
		-Updated RI Lighting Dashboard review + internal C-team notes				
Jacobs, Adam		2/11/2021	1.25	186.00		232.50
		-C&I sector team call -C&I talking points for 2020 year-end results presentation				
Jacobs, Adam		2/12/2021	1.25	186.00		232.50
		-RI project management meeting -follow-up w/ Division on December C&I data report -distribute next-steps/follow-ups from Feb C&I sector call				
Jacobs, Adam		2/16/2021	.50	186.00		93.00
		-check-in on data/reporting distribution				
Jacobs, Adam		2/17/2021	.50	186.00		93.00
		-follow-up w/ Ben Rivers on Telecomm initiative marketing materials				
Jacobs, Adam		2/19/2021	1.00	186.00		186.00
		-benchmarking opportunities/lessons learned from other states and applicability to RI -subcontractor workorder development -RI Project Management Meeting				
Jacobs, Adam		2/22/2021	.50	186.00		93.00
		-review Grid updated implementation/oversight tracker + Jan C&I data report				
Jacobs, Adam		2/23/2021	.25	186.00		46.50
		-1/2 RI daily scrum				
Johnson, Craig		2/1/2021	1.00	186.00		186.00
		Review PIM analysis tool w/ Sam and Adam.				
Johnson, Craig		2/2/2021	.50	186.00		93.00
		Internal RI team check-in on upcoming PIMs tech session, NG year-end performance, and planning for upcoming sector team meetings.				
Johnson, Craig		2/3/2021	1.25	186.00		232.50
		Discuss upcoming sector team meetings with internal team. Review preliminary year-end data for 2020. Coordinate with internal sector leads to discuss process for setting up Q1 tasks.				

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Project	7395	Rhode Island EERMC - 2021			Invoice	7134
Johnson, Craig		2/4/2021	.50	186.00		93.00
		Schedule meetings w/ internal teams to discuss Q1 tasks. Develop list of Q1 tasks for subject matter experts.				
Johnson, Craig		2/5/2021	.50	186.00		93.00
		RI Project Management Meeting - coordinate on upcoming sector team meetings, and debrief on PUC tech session on PIMs.				
Johnson, Craig		2/8/2021	2.00	186.00		372.00
		Prepare Q1 task items for Residential team. Check-in call w/ Margie to discuss Q1 tasks.				
Johnson, Craig		2/9/2021	2.25	186.00		418.50
		Prepare Q1 task items for Residential team. Check-in call w/ EFG to discuss Q1 tasks. Meeting prep.				
Johnson, Craig		2/10/2021	.25	186.00		46.50
		Coordinate with internal team on sector team meetings.				
Johnson, Craig		2/11/2021	3.00	186.00		558.00
		Monthly Residential Sector team meeting and associated meeting prep				
Johnson, Craig		2/12/2021	2.00	186.00		372.00
		RI Project Management Meeting - coordinate on sector team meetings, use of implementation oversight tracker and monthly data reports. Review notes/send out follow-up items/next steps to residential sector team attendees.				
Johnson, Craig		2/16/2021	3.50	186.00		651.00
		Coordinate w/ Adrian on Res/C&I data reports. E-mails w/ John T regarding updated BC models. 2ish hours - review monthly data report. Outline cadence for reminders on data sharing, questions/response deadlines, etc.				
Johnson, Craig		2/19/2021	.50	186.00		93.00
		Check-in with internal team on updates related to sector team oversight.				
Johnson, Craig		2/22/2021	.75	186.00		139.50
		Review January data report and assemble questions to send to National Grid. Internal Res team check-in w/ Margie; discussed internal briefing on MA Equity Working Group.				
Johnson, Craig		2/24/2021	.50	186.00		93.00
		Internal Res team check-in w/ Richard; discussed internal briefing on regional audit programs and participation/non-participation survey for EW and HVAC contractors.				
Ross, Samuel		2/1/2021	2.50	186.00		465.00
		PIM tool review meeting; prep & follow-up re: same				
Ross, Samuel		2/2/2021	5.00	186.00		930.00
		PIM Tech Session stakeholder brainstorming mtg, prep & follow-up re: same; EM&V correspondence, one-pager review, & C&I mtg prep				
Ross, Samuel		2/3/2021	2.50	186.00		465.00
		Monthly C&I EM&V mtg, pre & follow-up re: same				
Ross, Samuel		2/4/2021	7.25	186.00		1,348.50
		PIM Tech Session, prep & follow-up re: same; Workforce interview guide draft review & comment distribution				
Ross, Samuel		2/5/2021	4.50	186.00		837.00
		team mtg, incl. disc EM&V, SRP, PIM status and next steps; Leg Study mtg, prep re: same; EM&V task coord, call w/Ralph re: same				
Ross, Samuel		2/11/2021	1.50	186.00		279.00
		Participant/NonParticipant Study call, follow-up re: same; Gas Peak Demand One Pager review				

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Project	7395	Rhode Island EERMC - 2021			Invoice	7134
Ross, Samuel		2/12/2021	1.25	186.00	232.50	
		RI proj mgr team coord.				
Ross, Samuel		2/15/2021	4.00	186.00	744.00	
		PUC Open Meeting, follow-up mtg, initial work re: next steps				
Ross, Samuel		2/16/2021	5.50	186.00	1,023.00	
		PIM discussion, analysis re: updated PIM proposal; dev. calculator to reproduce; procedural call				
Ross, Samuel		2/17/2021	4.50	186.00	837.00	
		SRP TWG, prep re: same; EM&V kick-off coord with EcoMetric; PIM discussion re: Council presentation and C-Team impressions				
Ross, Samuel		2/19/2021	2.00	186.00	372.00	
		EM&V agenda development & distribution, team leads check in call, initial option value prep				
Ross, Samuel		2/20/2021	1.50	186.00	279.00	
		EM&V materials review, distributing same				
Ross, Samuel		2/21/2021	2.00	186.00	372.00	
		Option value meeting prep				
Ross, Samuel		2/22/2021	2.50	186.00	465.00	
		solar inverter study mtg, prep re: same, Option value disc., prep re: same				
Ross, Samuel		2/23/2021	1.25	186.00	232.50	
		EFG EM&V coord; SRP comments next steps, initial thinking re: PIM PUC workshop				
Ross, Samuel		2/24/2021	4.25	186.00	790.50	
		EM&V Res meeting, prep & follow-up re: same; PIM hearing prep call w/Becca; SRP comments finalization and correspondence				
Ross, Samuel		2/25/2021	2.50	186.00	465.00	
		PUC hearing, prep & follow-up re: same				
Ross, Samuel		2/28/2021	.50	186.00	93.00	
		EM&V agenda dev & dist				
		Totals	131.25		23,398.50	
		Total Labor				23,398.50
						Total this Phase
						\$25,757.50

Phase	004	Adv Integ Approaches & Emerging Issues				
Optimal Staff						
			Hours	Rate	Amount	
Guerard, Michael		2/17/2021	.75	198.00	148.50	
		call w Loiter/Nat'l Regulatory Research Inst.				
		Totals	.75		148.50	
		Total Labor				148.50
						Total this Phase
						\$148.50
						Total this Project
						\$53,846.75

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021	Invoice	7134
			Total this Report	\$53,846.75



EcoMetric Consulting, LLC
555 Exton Cms
Exton, PA 19341
610.400.8600
admin@ecometricconsulting.com

I N V O I C E

BILLED TO

Mike Guerard
Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

TOTAL DUE

\$2,764.00

Project Name	RI EEMRC Consultant	Invoice Date	03/05/2021
Project #	7395	Due Date	04/04/2021
Invoice #	1029-P2-21	Payment Terms	Net 30
Billing Period	02/01/21 - 02/26/21		

Task Number	Description	Amount
Task 1	EM&V Oversight	\$2,764.00
Task 2	Program Design & Policy	\$0.00

Subtotal \$2,764.00

Invoice Total \$2,764.00

Invoice Number 1029-P2-21
Period 02/01/21 - 02/26/21

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	Task 1: EM&V Oversight	Salil Gogte	Partner	2021-02	6.5	\$ 212.00	\$ 1,378.00
RI EEMRC Consultant	Task 1: EM&V Oversight	Michael Frischmann	Partner	2021-02	0	\$ 212.00	\$ -
RI EEMRC Consultant	Task 1: EM&V Oversight	Michael Honeychuck	Managing Consultant	2021-02	7	\$ 198.00	\$ 1,386.00
RI EEMRC Consultant	Task 1: EM&V Oversight	Bitul Sinha	Sr Engineer	2021-02	0	\$ 160.00	\$ -
RI EEMRC Consultant	Task 1: EM&V Oversight	Divya Prasanna	Project Coordinator	2021-02	0	\$ -	\$ -
Total					13.5		\$ 2,764.00

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	Task 2: Program Design & Policy	Salil Gogte	Partner	2021-02	0	\$ 212.00	\$ -
RI EEMRC Consultant	Task 2: Program Design & Policy	Michael Frischmann	Partner	2021-02	0	\$ 212.00	\$ -
RI EEMRC Consultant	Task 2: Program Design & Policy	Michael Honeychuck	Managing Consultant	2021-02	0	\$ 198.00	\$ -
RI EEMRC Consultant	Task 2: Program Design & Policy	Bitul Sinha	Sr Engineer	2021-02	0	\$ 160.00	\$ -
RI EEMRC Consultant	Task 2: Program Design & Policy	Divya Prasanna	Project Coordinator	2021-02	0	\$ -	\$ -
Total					-		\$ -

Name	Task	fname	lname	local_date	hours	task	notes
Salil Gogte	Task 1: EM&V Oversight	Salil	Gogte	2/3/2021	0.5	EM&V Oversight	budget and task management
Salil Gogte	Task 1: EM&V Oversight	Salil	Gogte	2/17/2021	2	EM&V Oversight	call with Sam, review materials
Salil Gogte	Task 1: EM&V Oversight	Salil	Gogte	2/19/2021	1	EM&V Oversight	review materials sent by Optimal
Salil Gogte	Task 1: EM&V Oversight	Salil	Gogte	2/24/2021	1	EM&V Oversight	residential weekly call
Salil Gogte	Task 1: EM&V Oversight	Salil	Gogte	2/25/2021	2	EM&V Oversight	review solar inverter memo and Mike's comments
							Kickoff call with Optimal
							Review EERMC website, download studies & reports
Michael Honeychuck	Task 1: EM&V Oversight	Michael	Honeychuck	2/17/2021	2	EM&V Oversight	Emails
							Review inverter memo
							Review Sense Monitor study
							Review tracker
Michael Honeychuck	Task 1: EM&V Oversight	Michael	Honeychuck	2/22/2021	2	EM&V Oversight	Emails
							Monthly residential EM&V call
Michael Honeychuck	Task 1: EM&V Oversight	Michael	Honeychuck	2/24/2021	2	EM&V Oversight	Solar inverter memo review, comments & emails
							Solar inverter memo review & discussion
							Call with Salil
Michael Honeychuck	Task 1: EM&V Oversight	Michael	Honeychuck	2/25/2021	1	EM&V Oversight	Emails

Energy Futures Group, Inc.
PO Box 587
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 4504
Invoice Date: February 28, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 02/01/21 through 02/28/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	8.00	\$198.00	\$1,584.00
LABOR - Travel Hours	0.00	\$99.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$1,584.00</u>

Energy Futures Group, Inc.

Services Performed 02/01/21 to 02/24/21

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
2/5/2021	Prep for meeting with Ngrid; lead lighting discussion; send notes and follow-up items			1.00			1.00	0.00	1.00
2/9/2021	C-team call with Optimal			0.75			0.75	0.00	0.75
2/10/2021	Update upstream dashboard data for Ben			0.50			0.50	0.00	0.50
2/9/2021	Call w/Optimal re: 2021 work: implementation oversight and 1 tasks			0.50			0.50	0.00	0.50
2/11/2021	Call to discuss RI Participant/No-Participant study			0.50			0.50	0.00	0.50
2/24/2021	Review and comment on HVAC add-on contractor survey			1.25			1.25	0.00	1.25
2/9/2021	Check in with Optimal to review 2021 scope of work and 1 plans			1.00			1.00	0.00	1.00
2/18/2021	Review 1 Scope of work and respond with questions			0.25			0.25	0.00	0.25
2/23/2021	Review Work Order in prep for call with Mike and Craig			0.25			0.25	0.00	0.25
2/24/2021	Review and comments on participating and non-participating			1.50			1.50	0.00	1.50
2/24/2021	Review Work Order with Mike and Craig			0.50			0.50	0.00	0.50
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	11.00	0.00	0.00	11.00	0.00	11.00
	Total Amount	\$0.00	\$0.00	\$1,500.00	\$0.00	\$0.00	\$1,500.00	0.00	\$1,500.00

Margie Lynch/Core Energy Insights, Inc.
111 Hooksett Road, Auburn, NH 03032

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 2-2021*
Invoice Date: *February 28, 2021*
OEI Project #: *7395*

Work Performed for National Grid USA Service Company

Description of Services	Amount
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Services Performed 02/01/2021 through 02/28/2021

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	1.00	\$186.00	\$186.00

TOTAL DUE **\$186.00**

Margie Lync Core Energy Insights, Inc.
Services Performed 02/01/2021 through 02/22/2021

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
2/8/21	Participated in work planning meeting w/C. Johnson and M. Guerard		0.50				0.50	0.00	0.50
2/22/2021	Outlined equity working group memo; discussed next steps w/C. Johnson		0.50				0.50	0.00	0.50
							0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	1.00	0.00	0.00	0.00	1.00	0.00	1.00
	Total Amount	\$0.00	\$16.00	\$0.00	\$0.00	\$0.00	\$16.00	0.00	\$16.00

Ralph Prah
7001 Stanhope Place, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 19
Invoice Date: February 28, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 02/01/21 through 02/28/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	18.00	\$198.00	\$3,564.00
LABOR - Travel Hours	0.00	\$99.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$3,564.00</u>

Ralp Pra
Services Performed 02/01/21 to 02/24/21

Date	Description of Services	001 - EERMC Oversight	002 - Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hrs.
1/5/2021	heat pump rep	0.50					0.50	0.00	0.50
1/6/2021	heat pump report; check-in call prep; updating study tracker; gas load shapes report; Sense report; C&I NTG report; legislative study task 2 report	3.75					3.75	0.00	3.75
1/7/2021	gas load shape report	0.75					0.75	0.00	0.75
1/8/2021	gas load shape report	1.00					1.00	0.00	1.00
1/9/2021	gas load shape report	0.75					0.75	0.00	0.75
1/10/2021	gas load shape report; Sense report; legislative study	1.25					1.25	0.00	1.25
1/14/2021	gas load shape report	0.25					0.25	0.00	0.25
1/15/2021	gas load shape report, leg report	0.50					0.50	0.00	0.50
1/21/2021	conf call on study tracker	0.75					0.75	0.00	0.75
1/26/2021	ex-ante review cases	0.75					0.75	0.00	0.75
1/27/2021	Res studies check-in call; gas load shapes report rev	1.25					1.25	0.00	1.25
1/28/2021	gas load shapes report; ex-ante review case	0.75					0.75	0.00	0.75
2/2/2021	ex-ante review cases	0.25					0.25	0.00	0.25
2/3/2021	non-res studies check-in call; legislative study report	1.25					1.25	0.00	1.25
2/4/2021	leg review study; work force study; ex-ante review; SEM report	1.50					1.50	0.00	1.50
2/5/2021	Call w/Sam on workplan	0.25					0.25	0.00	0.25
2/12/2021	P/NP studies	0.50					0.50	0.00	0.50
2/13/2021	P/NP studies	0.50					0.50	0.00	0.50
2/17/2021	custom impact eval; leg study; P/NP studies	0.25					0.25	0.00	0.25
2/24/2021	res call; custom electric impact ex-ante case	1.25					1.25	0.00	1.25
							0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hrs	11.00	0.00	0.00	0.00	0.00	11.00	0.00	11.00
	Total Amount	\$3,560.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,560.00	\$0.00	\$3,560.00

Rachel Sholly Energy Consulting
48 Hudson St. Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 38
Invoice Date: February 28, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 02/01/21 through 02/28/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	22.50	\$155.00	\$3,487.50
LABOR - Travel Hours	0.00	\$77.50	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$3,007.50</u>

Raciel Solly Energy Consulting
Services Performed 02/01/21 through 02/25/21

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
2/2/21	Sent final edu agenda & materials; Updated annual report timeline & TOC - sent to Mike & Becca	0.50	1.00				1.50	0.00	1.50
2/3/21	Sent outreach RFP to edu group; Edu call prep; Check-in w/Mike Annual Report, Priorities, PUC/PIMS; Reviewed Feb EERMC agenda; Sent annual report timeline & TOC to larger group; Edu mtg prep & followup	2.25	1.00				3.25	0.00	3.25
2/4/21	Optimal weekly scrum	0.50					0.50	0.00	0.50
2/5/21	Priorities discussion w/Mike			1.00			1.00	0.00	1.00
2/8/21	Drafted new website organization; Drafted priorities slides	2.00		1.50			3.50	0.00	3.50
2/9/21	Sent reminder to review RFP; Priorities chat w/Mike; Reviewed outreach RFP & sent feedback	1.00		0.75			1.75	0.00	1.75
2/10/21	Compiled feedback on NEED curriculum; Emailed URI; Sent feedback to NEED	1.00					1.00	0.00	1.00
2/11/21	Prepared & sent last year's Annual Report word doc to writers; Optimal weekly scrum & prep; Finalized priorities slides	0.50	0.50	1.75			2.75	0.00	2.75
2/12/21	Communications w/NEED	0.50					0.50	0.00	0.50
2/15/21	Website handoff chat	0.50					0.50	0.00	0.50
2/17/21	Reviewed final outreach RFP & posted to website; Emails re: NEEP 2021 mtg	0.75					0.75	0.00	0.75
2/18/21	Check-in w/Mike; Posted meeting materials; EERMC mtg - Priorities presentation	3.00					3.00	0.00	3.00
2/25/21	TWG mtg notes; Drafted edu agenda; Emailed OER; Call w/OER & Grid re: NEEP 2021 proposal	2.50					2.50	0.00	2.50
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	15.00	2.50	5.00	0.00	0.00	22.50	0.00	22.50
	Total Amount	\$2,325.00	\$377.50	\$775.00	\$0.00	\$0.00	\$3,102.50	0.00	\$3,102.50

Invoice



April 20, 2021
Project No: 7395
Invoice No: 7146

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2021

Professional Services from March 1, 2021 to March 31, 2021

Phase	001	EERMC Oversight	<hr style="border-top: 1px dashed black;"/>		
Optimal Staff					
			Hours	Rate	Amount
		Caesar, Adrian	.25	135.00	33.75
		Guerard, Michael	48.75	198.00	9,652.50
		Johnson, Craig	.50	186.00	93.00
		Ross, Samuel	34.00	186.00	6,324.00
		Totals	83.50		16,103.25
		Total Labor			16,103.25
Subcontractors					
		Rachel Sholly			1,937.50
		EcoMetric Consulting, LLC			5,482.50
		Total Subcontractors			7,420.00
					7,420.00
				Total this Phase	\$23,523.25

Phase	002	Dev of Work Products & Rep. of EERMC	<hr style="border-top: 1px dashed black;"/>		
Optimal Staff					
			Hours	Rate	Amount
		Belliveau, Eric	5.50	212.00	1,166.00
		Guerard, Michael	4.50	198.00	891.00
		Ross, Samuel	5.00	186.00	930.00
		Socks, Matthew	3.25	198.00	643.50
		Totals	18.25		3,630.50
		Total Labor			3,630.50

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Project	7395	Rhode Island EERMC - 2021	Invoice	7146
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Subcontractors

Core Energy Insights Inc.	930.00	
Rachel Sholly	1,162.50	
Total Subcontractors	2,092.50	2,092.50
	Total this Phase	\$5,723.00

Phase	003	EE & System Reliab. Prog. Design & Deliv
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Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	15.75	135.00	2,126.25	
Guerard, Michael	20.00	198.00	3,960.00	
Jacobs, Adam	15.25	186.00	2,836.50	
Johnson, Craig	25.75	186.00	4,789.50	
Mosenthal, Philip	3.50	212.00	742.00	
Ross, Samuel	28.50	186.00	5,301.00	
Totals	108.75		19,755.25	
Total Labor				19,755.25

Subcontractors

Rachel Sholly	1,627.50	
Energy Futures Group, Inc.	3,366.00	
Total Subcontractors	4,993.50	4,993.50
	Total this Phase	\$24,748.75

Billing Limits

	Current	Prior	To-Date
Total Billings	53,995.00	97,775.00	151,770.00
Limit			631,263.00
Remaining			479,493.00
		Total this Invoice	\$53,995.00

Billings to Date

	Current	Prior	Total
Labor	39,489.00	83,709.50	123,198.50
Subcontractor	14,506.00	14,065.50	28,571.50
Totals	53,995.00	97,775.00	151,770.00

Project 7395 Rhode Island EERMC - 2021 Invoice 7146

Billing Backup

Tuesday, April 20, 2021

Optimal Energy Inc.

Invoice 7146 Dated 4/20/2021

6:17:48 PM

Phase 001 EERMC Oversight

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian	3/23/2021		.25	135.00	33.75
	EMV Studies upload				
Guerard, Michael	3/1/2021		2.25	198.00	445.50
	OER/Div chk-in call, debriefs/tasks for team				
Guerard, Michael	3/2/2021		3.00	198.00	594.00
	EERMC topic work - Priorities, PIM comments				
Guerard, Michael	3/3/2021		.75	198.00	148.50
	Review/comment on draft EERMC agenda for BT; stakeholder call on SRP - Seth Handy				
Guerard, Michael	3/4/2021		.50	198.00	99.00
	Task list development for March				
Guerard, Michael	3/5/2021		1.75	198.00	346.50
	Team Leads check-in, prep for month's activities/tasks				
Guerard, Michael	3/8/2021		3.25	198.00	643.50
	Work on EERMC mtg materials/presentations				
Guerard, Michael	3/9/2021		.75	198.00	148.50
	EERMC mtg material dev.				
Guerard, Michael	3/10/2021		4.50	198.00	891.00
	Work on finalizing PUC PIM Comments; work on 3 of EERMC PPTs, coord with Grid				
Guerard, Michael	3/11/2021		4.75	198.00	940.50
	Finalize and send to OER all EERMC March mtg materials; team chk-ins				
Guerard, Michael	3/15/2021		1.50	198.00	297.00
	OER/Division/C-Team chk-in, debriefs				
Guerard, Michael	3/16/2021		2.75	198.00	544.50
	Bi-weekly Chk-in w OER/Grid; EERMC mtg prep				
Guerard, Michael	3/17/2021		1.25	198.00	247.50
	EERMC mtg prep; review public comment from S.Handy				
Guerard, Michael	3/18/2021		6.00	198.00	1,188.00
	EERMC meeting, prep and debriefs				
Guerard, Michael	3/19/2021		2.50	198.00	495.00
	Internal team Leads mtg; EERMC mtg follow-up tasks				
Guerard, Michael	3/22/2021		3.50	198.00	693.00
	Review/comment on ExComm agenda for BT; Planning w Rachel for Educ/Comm tasks - Priorities, CHP annual mtg, GA Annual Report, Retreat, Q report to EERMC, website; EERMC mtg follow-up tasks				
Guerard, Michael	3/24/2021		1.25	198.00	247.50
	Chk-in on Priorities, draft section review; Post-council comm. w P.Case				

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Page 3

Project	7395	Rhode Island EERMC - 2021			Invoice	7146
Guerard, Michael		3/25/2021	2.50	198.00		495.00
		EERMC Ex Comm meeting, prep and follow-up; review planning timeline and set up team tasks/schedules				
Guerard, Michael		3/29/2021	4.50	198.00		891.00
		OER/Div chk-in call; Mtg w RSholly on Priorities and other EERMC mtg materials for April mtg; follow-up on info request from P.Case				
Guerard, Michael		3/30/2021	1.50	198.00		297.00
		Mtg w OER/Grid, follow-up review of RIIB legislation				
Johnson, Craig		3/8/2021	.25	186.00		46.50
		Review EERMC Report content.				
Johnson, Craig		3/15/2021	.25	186.00		46.50
		Review and provide feedback on draft survey for Council retreat.				
Ross, Samuel		3/8/2021	6.00	186.00		1,116.00
		Drafting, responding to initial internal feedback on PIM comments				
Ross, Samuel		3/9/2021	5.50	186.00		1,023.00
		further PIM comments development; correspondence w/NGrid re: EM&V presentation, internal disc. re: same				
Ross, Samuel		3/10/2021	9.00	186.00		1,674.00
		Editing PIM comments re: OER feedback; drafting EM&V slides & coord w/NGrid re: same, internal discussions re: both of the above				
Ross, Samuel		3/11/2021	8.50	186.00		1,581.00
		Council materials - finalizing EM&V & PIM slides, PIM comments, SRP TWG update; call w/Becca re: PIM comments				
Ross, Samuel		3/18/2021	5.00	186.00		930.00
		Council Meeting, prep re: same				
		Totals	83.50			16,103.25
		Total Labor				16,103.25
					Total this Phase	\$23,523.25

Phase 002 Dev of Work Products & Rep. of EERMC

Optimal Staff

			Hours	Rate	Amount
Belliveau, Eric		3/5/2021	1.25	212.00	265.00
		team check in, PIM discussion			
Belliveau, Eric		3/8/2021	.75	212.00	159.00
		PIMS call and disc with team			
Belliveau, Eric		3/10/2021	.50	212.00	106.00
		PIM review SR doc			
Belliveau, Eric		3/11/2021	.75	212.00	159.00
		Pims meeting			
Belliveau, Eric		3/16/2021	1.25	212.00	265.00
		PIM call, prep with MG and SR			
Belliveau, Eric		3/19/2021	1.00	212.00	212.00
		check in with team focus on PIM comments			
Guerard, Michael		3/4/2021	.75	198.00	148.50
		Chk-in on Annual report			

Project	7395	Rhode Island EERMC - 2021			Invoice	7146
Guerard, Michael		3/12/2021	.75	198.00		148.50
		Commitments Tracker review				
Guerard, Michael		3/15/2021	1.00	198.00		198.00
		Prep for PIM stakeholder mtg, review Div comments				
Guerard, Michael		3/16/2021	2.00	198.00		396.00
		Call w OER/Div/Grid on PIM comments, prep and debriefs				
Ross, Samuel		3/7/2021	.75	186.00		139.50
		EERMC Annual Report MPS & Targets Section				
Ross, Samuel		3/11/2021	.75	186.00		139.50
		EM&V follow-ups - Sense Rpt & 1-pager				
Ross, Samuel		3/12/2021	3.25	186.00		604.50
		Appliance recycling read-through, comments consolidation, distribution; SEM 1-pager review, correspondence re: same				
Ross, Samuel		3/23/2021	.25	186.00		46.50
		Website update check re: targets				
Socks, Matthew		3/3/2021	1.00	198.00		198.00
		RI AESC check-in mtg, w/ OER				
Socks, Matthew		3/4/2021	.75	198.00		148.50
		Reviewing AESC 2021 Final Draft review				
Socks, Matthew		3/6/2021	1.00	198.00		198.00
		Reviewing AESC 2021 Final Draft review				
Socks, Matthew		3/25/2021	.50	198.00		99.00
		Participating in AESC 2021 Study Group call				
		Totals	18.25			3,630.50
		Total Labor				3,630.50
					Total this Phase	\$5,723.00

Phase 003 EE & System Reliab. Prog. Design & Deliv

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian		3/2/2021	.25	135.00	33.75
		March data sharing calendar reminders for sector team participants (raw program data, C-Team data reports, and National Grid question responses)			
Caesar, Adrian		3/3/2021	.25	135.00	33.75
		RI program data sharing tracker updates and coordination with Grid C&I team re: March reporting timeline			
Caesar, Adrian		3/4/2021	3.25	135.00	438.75
		C&I and Res sector team mtg prep, C&I sector team call and notetaking and documentation of action items			
Caesar, Adrian		3/5/2021	1.00	135.00	135.00
		RI Project management check in			
Caesar, Adrian		3/12/2021	3.25	135.00	438.75
		February Res and C&I program data processing and report development, C&I reporting workbook updates for updated NGrid C&I electric reporting			

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Project	7395	Rhode Island EERMC - 2021			Invoice	7146
Caesar, Adrian		3/15/2021	3.50	135.00		472.50
		February Res/C&I monthly data processing, report development and distribution to sector teams				
Caesar, Adrian		3/17/2021	1.25	135.00		168.75
		March SRP TWG prep and notetaking				
Caesar, Adrian		3/18/2021	.75	135.00		101.25
		C-Team presentation on PIMs/discussion on EERMC comments to PUC notetaking				
Caesar, Adrian		3/19/2021	1.00	135.00		135.00
		RI weekly project management check-in				
Caesar, Adrian		3/26/2021	1.00	135.00		135.00
		RI Weekly project mgmt check-in				
Caesar, Adrian		3/29/2021	.25	135.00		33.75
		Updated implementation and oversight tracker review, data sharing tracker update				
Guerard, Michael		3/1/2021	1.50	198.00		297.00
		Sector team coord, prep for monthly meetings; review planning docs				
Guerard, Michael		3/3/2021	2.00	198.00		396.00
		AESC call; CI EMV monthly call				
Guerard, Michael		3/4/2021	2.75	198.00		544.50
		Rez and CI monthly sector mtgs, debriefs				
Guerard, Michael		3/8/2021	.75	198.00		148.50
		PIM strategy call w SR, EB				
Guerard, Michael		3/15/2021	1.50	198.00		297.00
		Review rez/CI data drafts, team coord.				
Guerard, Michael		3/19/2021	.75	198.00		148.50
		Coord w CJ on updated commitment tracker and review what was distributed to group				
Guerard, Michael		3/23/2021	1.50	198.00		297.00
		Planning on deep dive topics; prep for TWG				
Guerard, Michael		3/24/2021	2.50	198.00		495.00
		Coord deep dive next steps; research; chk-in EMV monthly mtg				
Guerard, Michael		3/25/2021	4.25	198.00		841.50
		EE TWG, follow-up review of Priority presentations; check in w sector Leads on Tracker and other prep for monthly mtgs				
Guerard, Michael		3/30/2021	.50	198.00		99.00
		Chk-in w CJ on Tracker updates, process				
Guerard, Michael		3/31/2021	2.00	198.00		396.00
		respond to RI Housing questions; chk-in w sector leads on monthly sector mtg prep				
Jacobs, Adam		3/1/2021	1.25	186.00		232.50
		-Mini-ISP chillers research and ex-ante baseline review -review RI C&I EM&V Monthly Check In (C-Team and Grid Team) -sector team prep -send out agenda for March C&I sector team call				
Jacobs, Adam		3/2/2021	.75	186.00		139.50
		-1/2 RI daily scrum -SEM 1 pager review				
Jacobs, Adam		3/3/2021	.25	186.00		46.50
		-sector team prep				

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Project	7395	Rhode Island EERMC - 2021			Invoice	7146
Jacobs, Adam		3/4/2021	1.25	186.00		232.50
Jacobs, Adam		3/5/2021	1.25	186.00		232.50
Jacobs, Adam		3/8/2021	1.25	186.00		232.50
Jacobs, Adam		3/9/2021	.25	186.00		46.50
Jacobs, Adam		3/10/2021	.50	186.00		93.00
Jacobs, Adam		3/15/2021	1.00	186.00		186.00
Jacobs, Adam		3/16/2021	.75	186.00		139.50
Jacobs, Adam		3/17/2021	.25	186.00		46.50
Jacobs, Adam		3/19/2021	.50	186.00		93.00
Jacobs, Adam		3/23/2021	.50	186.00		93.00
Jacobs, Adam		3/25/2021	1.50	186.00		279.00
Jacobs, Adam		3/26/2021	1.00	186.00		186.00
Jacobs, Adam		3/29/2021	.75	186.00		139.50
Jacobs, Adam		3/30/2021	1.25	186.00		232.50

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Project	7395	Rhode Island EERMC - 2021			Invoice	7146
Jacobs, Adam		3/31/2021	1.00	186.00		186.00
Johnson, Craig		3/1/2021	1.00	186.00		186.00
Johnson, Craig		3/3/2021	2.25	186.00		418.50
Johnson, Craig		3/4/2021	1.50	186.00		279.00
Johnson, Craig		3/5/2021	1.00	186.00		186.00
Johnson, Craig		3/9/2021	1.50	186.00		279.00
Johnson, Craig		3/10/2021	2.25	186.00		418.50
Johnson, Craig		3/11/2021	.25	186.00		46.50
Johnson, Craig		3/15/2021	4.75	186.00		883.50
Johnson, Craig		3/19/2021	3.50	186.00		651.00
Johnson, Craig		3/24/2021	.50	186.00		93.00
Johnson, Craig		3/25/2021	2.25	186.00		418.50
Johnson, Craig		3/26/2021	1.00	186.00		186.00
Johnson, Craig		3/29/2021	1.50	186.00		279.00
Johnson, Craig		3/30/2021	.50	186.00		93.00
Johnson, Craig		3/31/2021	2.00	186.00		372.00

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Project	7395	Rhode Island EERMC - 2021			Invoice	7146
Mosenthal, Philip		3/3/2021	.50	212.00		106.00
		Codes and Standards conf. re state standards				
Mosenthal, Philip		3/16/2021	.25	212.00		53.00
		disc. re PIMs				
Mosenthal, Philip		3/17/2021	1.50	212.00		318.00
		rev/comment on PIMS doc, discs. re same				
Mosenthal, Philip		3/18/2021	1.25	212.00		265.00
		review PIMS docs				
Ross, Samuel		3/1/2021	3.25	186.00		604.50
		EM&V - solar PFC work plan review, Gas load shapes 1-pager, app recylce distrib, ISP chiller, solar invertor comments				
Ross, Samuel		3/2/2021	.75	186.00		139.50
		SEM Study next steps, one pager distrib				
Ross, Samuel		3/3/2021	2.50	186.00		465.00
		EM&V Monthly call, prep & follow-up re: same; option value follow-up email for Joel; Appliance recycling study dist, workforce interview guide follow-up				
Ross, Samuel		3/4/2021	.50	186.00		93.00
		EM&V monthly mgmt call w/EcoM				
Ross, Samuel		3/5/2021	1.25	186.00		232.50
		RI mgmt team internal call, part/NP study reviewer coord;				
Ross, Samuel		3/8/2021	1.00	186.00		186.00
		Finalize SENSE report comments, send to Ngrid				
Ross, Samuel		3/10/2021	.75	186.00		139.50
		SRP check in w/Carrie, option val. presentation coord				
Ross, Samuel		3/14/2021	.25	186.00		46.50
		distrib EM&V NP study				
Ross, Samuel		3/15/2021	3.00	186.00		558.00
		EM&V study distrib, correspondence - AppRecylce, Part study, SEM onepager; CTeam Check-in w/OER, DPUC				
Ross, Samuel		3/16/2021	1.50	186.00		279.00
		PIM call, debrief re: same				
Ross, Samuel		3/17/2021	1.00	186.00		186.00
		SRP TWG, prep re: same				
Ross, Samuel		3/19/2021	2.75	186.00		511.50
		weekly pm check in call, part study comments merged and distributed, EM&V agenda dev & distribute				
Ross, Samuel		3/22/2021	.25	186.00		46.50
		Correspondence re: attendance at 3/24 EM&V call				
Ross, Samuel		3/23/2021	.50	186.00		93.00
		Catching up with EcoM re: Part/NonPart studies				
Ross, Samuel		3/24/2021	4.50	186.00		837.00
		NonPart SStudy comments; review Part study comments; EM&V Res Monthly call; follow ups re: same				
Ross, Samuel		3/25/2021	.75	186.00		139.50
		Study comment coordination				
Ross, Samuel		3/26/2021	3.00	186.00		558.00
		weekly proj mgmt check in; NP Study comments merged and distributed; add't'l P comments distributed				
Ross, Samuel		3/29/2021	.25	186.00		46.50

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Project	7395	Rhode Island EERMC - 2021			Invoice	7146
		sending add'l Particip Study comments to Ngrid				
Ross, Samuel		3/30/2021	.75	186.00	139.50	
		FRSO One Pager Review, distrib comments re: same				
		Totals	108.75		19,755.25	
		Total Labor				19,755.25
				Total this Phase		\$24,748.75
				Total this Project		\$53,995.00
				Total this Report		\$53,995.00



EcoMetric Consulting, LLC
555 Exton Cms
Exton, PA 19341
610.400.8600
admin@ecometricconsulting.com

INVOICE

BILLED TO

Mike Guerard
Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

TOTAL DUE

\$5,482.50

Project Name	RI EEMRC Consultant	Invoice Date	04/06/2021
Project #	7395	Due Date	05/06/2021
Invoice #	1029-P3-21	Payment Terms	Net 30
Billing Period	02/27/21 - 04/02/21		

Task Number	Description	Amount
Task 1	EM&V Oversight	\$5,482.50
Task 2	Program Design & Policy	\$0.00

Subtotal	\$5,482.50
Invoice Total	\$5,482.50

Invoice Number **1029-P3-21**
Period **02/27/21 - 04/02/21**

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	Task 1: EM&V Oversight	Salil Gogte	Partner	2021-03	7.75	\$ 212.00	\$ 1,643.00
RI EEMRC Consultant	Task 1: EM&V Oversight	Michael Frischmann	Partner	2021-03	2	\$ 212.00	\$ 424.00
RI EEMRC Consultant	Task 1: EM&V Oversight	Michael Honeychuck	Managing Consultant	2021-03	17.25	\$ 198.00	\$ 3,415.50
RI EEMRC Consultant	Task 1: EM&V Oversight	Bitul Sinha	Sr Engineer	2021-03	0	\$ 160.00	\$ -
RI EEMRC Consultant	Task 1: EM&V Oversight	Divya Prasanna	Project Coordinator	2021-03	0	\$ -	\$ -
Total					27.0		\$ 5,482.50

Name	Task	Michael	Frischmann	local_date	hours	task	notes
Michael Frischman	Task 1: EM&V Oversight	Michael	Frischmann	3/16/2021	2	EM&V Oversight	study plan reviews
Salil Gogte	Task 1: EM&V Oversight	Salil	Gogte	3/24/2021	1	EM&V Oversight	
Salil Gogte	Task 1: EM&V Oversight	Salil	Gogte	3/3/2021	0.5	EM&V Oversight	discuss RI meeting with Mike and Sam
Salil Gogte	Task 1: EM&V Oversight	Salil	Gogte	3/4/2021	0.75	EM&V Oversight	monthly check in with Optimal
Salil Gogte	Task 1: EM&V Oversight	Salil	Gogte	3/11/2021	1	EM&V Oversight	review and submit appliance recycling report.
Salil Gogte	Task 1: EM&V Oversight	Salil	Gogte	3/17/2021	0.5	EM&V Oversight	check with Mike on study reviews
Salil Gogte	Task 1: EM&V Oversight	Salil	Gogte	3/24/2021	2	EM&V Oversight	review part and non part study comments. attend residential meeting.
Salil Gogte	Task 1: EM&V Oversight	Salil	Gogte	3/26/2021	2	EM&V Oversight	review CARD work plan
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/30/2021	0.5	EM&V Oversight	review study comments and study progress with Mike H Solar inverter memo comments
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/1/2021	0.5	EM&V Oversight	Emails Discussions with Salil Review appliance recycling study
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/3/2021	2	EM&V Oversight	Monthly C&I call Review appliance recycling study Monthly internal call with Optimal
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/4/2021	2	EM&V Oversight	Planning
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/9/2021	1	EM&V Oversight	Appliance recycling study review & comments
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/10/2021	2	EM&V Oversight	Appliance recycling study review, comments, & emails Review participant & non-participant studies
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/11/2021	0.75	EM&V Oversight	Emails Review participant study
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/15/2021	1	EM&V Oversight	Emails Review participant study
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/16/2021	1	EM&V Oversight	Emails Review participant study Discussions
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/17/2021	2	EM&V Oversight	Emails Emails Planning
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/22/2021	1	EM&V Oversight	Weekly check-in Call with Sam Review of non-participant study
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/23/2021	1	EM&V Oversight	Emails Review of non-participant study
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/24/2021	1	EM&V Oversight	Emails Review of non-participant study
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	3/25/2021	1	EM&V Oversight	Emails
Michael Honeychuc	Task 1: EM&V Oversight	Michael	Honeychuck	4/1/2021	0.5	EM&V Oversight	Review appliance recycling study comments

Energy Futures Group, Inc.
PO Box 587
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 4549
Invoice Date: March 31, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 02/01/21 through 02/28/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	17.00	\$198.00	\$3,366.00
LABOR - Travel Hours	0.00	\$99.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$3,366.00</u>

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
3/2/2021	Review and comment on new RI HP program			0.75			0.75	0.00	0.75
3/2/2021	Set up res wx programs research matrix for Liz to use to complete, set up Liz to make calls.			1.50			1.50	0.00	1.50
3/3/2021	Work on completing matrix of residential programs survey			0.75			0.75	0.00	0.75
3/4/2021	Update C&I lighting dashboard; prepare agenda for lighting subgroup			0.75			0.75	0.00	0.75
3/5/2021	C&I lighting call with Ngrid; compile and distribute notes			0.75			0.75	0.00	0.75
3/9/2021	Call with Margie Lynch at MassSave to gather program info and reviewing document sent from Margie Lynch on virtual home assessments			0.75			0.75	0.00	0.75
3/9/2021	Margie Lynch collect survey info			0.50			0.50	0.00	0.50
3/16/2021	Northeast Consultants Coordinating call			0.25			0.25	0.00	0.25
3/18/2021	Research on status of residential retrofit programs, reaching out to contacts for information, and drafting a memo.			4.00			4.00	0.00	4.00
3/19/2021	Updating matrix and memo based on responses from program administrators			1.00			1.00	0.00	1.00
3/22/2021	EM&V monthly call prep, RI Grid purchase and impact on future EM&V work			0.25			0.25	0.00	0.25
3/24/2021	Finishing the residential programs status memo			1.00			1.00	0.00	1.00
3/24/2021	RI EM&V call, prep			1.25			1.25	0.00	1.25
3/24/2021	Initial review of Participant and NP study SOW, clarifying role in ongoing EM&V			0.50			0.50	0.00	0.50
3/25/2021	Review and comments on Participant study SOW			1.00			1.00	0.00	1.00
3/25/2021	Review and comments on Non-participant study SOW			1.00			1.00	0.00	1.00
3/28/2021	Review res retrofit programs review, off to Optimal			1.00			1.00	0.00	1.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	17.00	0.00	0.00	17.00	0.00	17.00
	Total Amount	\$0.00	\$0.00	\$3,366.00	\$0.00	\$0.00	\$3,366.00	0.00	\$3,366.00

Margie Lynch/Core Energy Insights, Inc.
4445 E. Hoback River Road, Jackson, WY 83001

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 3-2021*
Invoice Date: *March 31, 2021*
OEI Project #: *7395*

Work Performed for National Grid USA Service Company

Description of Services	Amount
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Services Performed 03/01/2021 through 03/31/2021

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	5.00	\$186.00	\$930.00

TOTAL DUE

\$930.00

Margie Lync Core Energy Insights, Inc.
Services Performed 03/01/2021 through 03/31/2021

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
3/1/21	Began drafting memo re: MA Equity Working Group		1.00				1.00	0.00	1.00
3/2/2021	Continued drafting MA Equity Working Group memo		1.00				1.00	0.00	1.00
3/3/2021	Completed MA Equity Working Group memo		2.00				2.00	0.00	2.00
3/9/2021	Provided information to R. Faesy on MA program activities		0.50				0.50	0.00	0.50
3/29/2021	Monthly check in w/C. Johnson		0.50				0.50	0.00	0.50
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	5.00	0.00	0.00	0.00	5.00	0.00	5.00
	Total Amount	\$0.00	\$30.00	\$0.00	\$0.00	\$0.00	\$30.00	0.00	\$30.00

Rachel Sholly Energy Consulting
48 Hudson St. Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 38a
Invoice Date: March 31, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount
Services Performed 03/01/21 through 03/31/21		
	<u>Hours</u>	<u>Hourly Rate</u>
LABOR - Regular Hours	30.50	\$155.00
LABOR - Travel Hours	0.00	\$77.50
Travel Expenses (See attached travel expense form for details.)		\$0.00
TOTAL DUE		<u>\$4,727.50</u>

Raciel Solly Energy Consulting
Services Performed 03/01/21 to 03/31/21

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
3/1/21	Emails re: edu call; Sent final agenda; Edu call prep; Uploaded EM&V one pager; Emails re: Annual Report	1.00	0.25				1.25	0.00	1.25
3/3/21	Edu prep & call	1.00					1.00	0.00	1.00
3/4/21	Website updates; Optimal weekly scrum	1.50					1.50	0.00	1.50
3/5/21	Priorities discussion w/Mike			1.50			1.50	0.00	1.50
3/9/21	Drafted edu sections & compiled first draft annual report		3.50				3.50	0.00	3.50
3/10/21	NEED workshop registration; Started drafting updated slides on priorities; Priorities slides & TWG memo; Communications w/Mike; Started drafting retreat survey; Drafted annual report slides	0.75	0.50	1.50			2.75	0.00	2.75
3/11/21	Check-in w/Mike - Council mtg materials prep; Mtg materials prep - Priorities & TWG memo; Finalized and sent Annual Report first draft		2.00	2.00			4.00	0.00	4.00
3/12/21	Posted meeting materials; Finished drafting retreat survey & sent internally	1.00					1.00	0.00	1.00
3/15/21	Finalized and sent edu notes; Posted meeting materials	1.00					1.00	0.00	1.00
3/16/21	Optimal weekly scrum & prep; Put retreat survey into google forms; Updated annual report policy recommendations based on OER comments	1.25	0.50				1.75	0.00	1.75
3/18/21	Posted meeting materials; Updated & posted annual report; Updated & posted priorities & annual report slides; EERMC mtg (priorities & annual report)	0.25	0.75	0.75			1.75	0.00	1.75
3/22/21	Updated website - RFP page; Check-in w/Mike; Posted meeting materials	2.00					2.00	0.00	2.00
3/24/21	Reviewed RFP question responses; Updated website - RFP page, added 2021-2023 targets; Optimal weekly scrum & prep	1.50					1.50	0.00	1.50
3/25/21	EE TWG mtg & notes			1.75			1.75	0.00	1.75
3/29/21	Compiled priorities spreadsheet; Priorities & EE planning discussion w/Mike			2.50			2.50	0.00	2.50
3/30/21	Set up & sent priorities word doc			0.50			0.50	0.00	0.50
3/31/21	Website updates	1.25					1.25	0.00	1.25
	Total hours	12.50	7.50	10.50	0.00	0.00	30.50	0.00	30.50
	Total Amount	\$1,37.50	\$1,162.50	\$1,627.50	\$0.00	\$0.00	\$3,727.50	0.00	\$3,727.50

Invoice



April 30, 2021
Project No: 7395
Invoice No: 7160

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2021

Professional Services from April 1, 2021 to April 30, 2021

Phase 001 EERMC Oversight

Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	.50	135.00	67.50	
Guerard, Michael	42.75	198.00	8,464.50	
Johnson, Craig	18.00	186.00	3,348.00	
Totals	61.25		11,880.00	
Total Labor				11,880.00

Subcontractors

Rachel Sholly			6,587.50	
EcoMetric Consulting, LLC			2,259.00	
Ralph Prah			3,861.00	
Total Subcontractors			12,707.50	12,707.50

Total this Phase \$24,587.50

Phase 002 Dev of Work Products & Rep. of EERMC

Optimal Staff

	Hours	Rate	Amount	
Belliveau, Eric	1.00	212.00	212.00	
Guerard, Michael	3.50	198.00	693.00	
Ross, Samuel	2.75	186.00	511.50	
Socks, Matthew	2.75	198.00	544.50	
Totals	10.00		1,961.00	
Total Labor				1,961.00

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021	Invoice	7160
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Subcontractors

Core Energy Insights Inc.	279.00	
Rachel Sholly	1,356.25	
Total Subcontractors	1,635.25	1,635.25
	Total this Phase	\$3,596.25

Phase	003	EE & System Reliab. Prog. Design & Deliv
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Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	17.50	135.00	2,362.50	
Guerard, Michael	24.75	198.00	4,900.50	
Jacobs, Adam	14.75	186.00	2,743.50	
Johnson, Craig	43.25	186.00	8,044.50	
Mosenthal, Philip	.50	212.00	106.00	
Ross, Samuel	26.50	186.00	4,929.00	
Totals	127.25		23,086.00	
Total Labor				23,086.00

Subcontractors

Rachel Sholly	581.25	
Energy Futures Group, Inc.	3,255.50	
Total Subcontractors	3,836.75	3,836.75
	Total this Phase	\$26,922.75

Phase	004	Adv Integ Approaches & Emerging Issues
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Optimal Staff

	Hours	Rate	Amount	
Johnson, Craig	3.50	186.00	651.00	
Totals	3.50		651.00	
Total Labor				651.00
	Total this Phase			\$651.00

Billing Limits

	Current	Prior	To-Date	
Total Billings	55,757.50	151,770.00	207,527.50	
Limit			631,263.00	
Remaining			423,735.50	
			Total this Invoice	\$55,757.50

Billings to Date

	Current	Prior	Total
Labor	37,578.00	123,198.50	160,776.50

Project	7395	Rhode Island EERMC - 2021			Invoice	7160
Subcontractor		18,179.50	28,571.50	46,751.00		
Totals		55,757.50	151,770.00	207,527.50		

Project 7395 Rhode Island EERMC - 2021 Invoice 7160

Billing Backup

Thursday, May 20, 2021

Optimal Energy Inc.

Invoice 7160 Dated 4/30/2021

12:51:37 PM

Phase 001 EERMC Oversight

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian	4/20/2021		.50	135.00	67.50
	EERMC website Resources page update/April mtg materials review				
Guerard, Michael	4/6/2021		3.25	198.00	643.50
	Review NEEP Partnership agreement; team coord.; Education Wkg group updates, doc review; secor mtg prep				
Guerard, Michael	4/8/2021		.50	198.00	99.00
	Review/comment on draft EERMC Agenda from OER;				
Guerard, Michael	4/9/2021		3.00	198.00	594.00
	EERMC Priorities reseacrh and mtg material dev; Analysis and research on PA admin costs for OER				
Guerard, Michael	4/12/2021		1.50	198.00	297.00
	Bi-weekly mtg w OER-Div, prep and follow-up tasks; respond to Q from P.Case				
Guerard, Michael	4/13/2021		3.75	198.00	742.50
	Bi-weekly chk-in w Oer-Grid; work on EERMC mtg materials; review website enhancements				
Guerard, Michael	4/14/2021		5.25	198.00	1,039.50
	EERMC mtg materials dev.; review SRP priority slides				
Guerard, Michael	4/15/2021		5.25	198.00	1,039.50
	EERMC mtg materials comletion, submital; tam chk-ins				
Guerard, Michael	4/16/2021		1.75	198.00	346.50
	Finalize and submit final EERMC mtg docs				
Guerard, Michael	4/19/2021		.75	198.00	148.50
	EERMC mtg prep, coord w RS				
Guerard, Michael	4/21/2021		3.75	198.00	742.50
	EERMC mtg prep; team chk-in; update mtg w P. Case				
Guerard, Michael	4/22/2021		6.75	198.00	1,336.50
	EERMC mtg,prep and debriefs				
Guerard, Michael	4/23/2021		1.25	198.00	247.50
	Council mtg debriefs, update schedules/task list				
Guerard, Michael	4/26/2021		4.75	198.00	940.50
	OER-Div-CTeam chk-in call, debrief team on resulting EERMC presentation expectations; retreat planning; TWG prep; team updates and refinements for reporting structures				
Guerard, Michael	4/29/2021		1.25	198.00	247.50
	PUC Open mtg stream on PIMs/REIIB, debriefs w team				
Johnson, Craig	4/14/2021		1.00	186.00	186.00
	Assist Rachel with process for testing new features on Council website. Review website back up and staging site procedures w/ Rachel and Adrian.				

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7160
Johnson, Craig		4/15/2021	5.25	186.00	976.50	
		Develop format for tables to be included in C-Team Q1 report to Council. Develop content to be included in Q1 report. Discussions with Mike about the same.				
Johnson, Craig		4/16/2021	5.25	186.00	976.50	
		Assemble content for Q1 report - Add more detail to sector team meeting descriptions. Add detail about monthly data process, and development of implementation and oversight tracker. Add detail for PUC sessions held. Review and provide final edits on Q1 report. Discussions w/ Mike about the same. Review and provide edits on EERMC priorities memo, discussion w/ Mike about the same. Review updates to Council website, emails w/ Rachel S. about the same.				
Johnson, Craig		4/20/2021	.75	186.00	139.50	
		Prep for Council mtg - discuss updates to EERMC priorities presentation w/ Mike. Set up meeting to discuss improved process for compiling data for Q-reports to Council. Brainstorm re: same.				
Johnson, Craig		4/21/2021	1.50	186.00	279.00	
		Review Council Priorities presentation; update presentation deck with visuals, graphics, and slide numbers.				
Johnson, Craig		4/26/2021	1.25	186.00	232.50	
		Brainstorm process for tracking all of C-Teams work for Quarterly Reports to the Council. Discuss w/ Adrian and Mike. Draft team assignments and template.				
Johnson, Craig		4/27/2021	.25	186.00	46.50	
		Discussion w/ Mike re: future of EE landscape in RI and Council seats.				
Johnson, Craig		4/29/2021	2.00	186.00	372.00	
		Attend EE TWG meeting.				
Johnson, Craig		4/30/2021	.75	186.00	139.50	
		Review presentation and content needs for May EERMC meeting w/ Adam and Mike.				
		Totals	61.25		11,880.00	
		Total Labor				11,880.00
					Total this Phase	\$24,587.50

Phase	002	Dev of Work Products & Rep. of EERMC			
Optimal Staff					
			Hours	Rate	Amount
Belliveau, Eric		4/7/2021	1.00	212.00	212.00
		strategy call with MG - changes in proposed laws, money changes, EERMC stakeholders.			
Guerard, Michael		4/12/2021	2.50	198.00	495.00
		Sector team chk-in; coord OER data request response on PA admin costs			
Guerard, Michael		4/13/2021	.50	198.00	99.00
		Review SRP BCA model from Grid			
Guerard, Michael		4/15/2021	.50	198.00	99.00
		Review/edit SRP Priorities Ppt for SRP TWG			
Ross, Samuel		4/9/2021	.25	186.00	46.50
		review EERMC survey results deck			

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7160
Ross, Samuel		4/15/2021	.50	186.00	93.00	
		SRP TWG memo contributions				
Ross, Samuel		4/23/2021	2.00	186.00	372.00	
		EM&V document distribution; SRP YE report initial review				
Socks, Matthew		4/15/2021	1.00	198.00	198.00	
		Review AESC sensitivities section draft; Participating in 2021 AESC Study Group call				
Socks, Matthew		4/19/2021	1.50	198.00	297.00	
		Review AESC sensitivities section draft				
Socks, Matthew		4/20/2021	.25	198.00	49.50	
		Responding to B.Trietch re: AESC 2021 sensitivities section/comments				
		Totals	10.00		1,961.00	
		Total Labor				1,961.00
						Total this Phase
						\$3,596.25

Phase 003 EE & System Reliab. Prog. Design & Deliv

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian		4/1/2021	3.25	135.00	438.75
		C&I and Res sector team meeting prep and notetaking, Program implementation oversight tracker updates and upload to shrepoint			
Caesar, Adrian		4/9/2021	3.00	135.00	405.00
		Low-Income program delivery, spending, and savings data research			
Caesar, Adrian		4/12/2021	.50	135.00	67.50
		C&I March data review and report development			
Caesar, Adrian		4/19/2021	3.25	135.00	438.75
		RI Res and C&I March data and quarterly program report review and March Data report development			
Caesar, Adrian		4/26/2021	2.50	135.00	337.50
		RI MPS data results discussion and mapping tool review for Res/C&I deep dive mtgs, Bldg type potential MPS data pulls, EERMC quarterly report compiling and development process			
Caesar, Adrian		4/27/2021	2.25	135.00	303.75
		BC MPS Mapping tool update - compliance filing BC models, MPS data pull for deep dive mtgs			
Caesar, Adrian		4/29/2021	2.75	135.00	371.25
		Gas MPS BC model mapping tool update - compliance filing BC model data, C&I planning deep dive mtg #1 prep and notetaking			
Guerard, Michael		4/2/2021	3.75	198.00	742.50
		Review Synapse macroeconomic report, BCA impacts; Review/edit Codes&S RFP SOW; C&I sector mtg debriefs			
Guerard, Michael		4/5/2021	4.25	198.00	841.50
		Review Brightline study final report; review Grid's tracker responses; Sector mtg prep, data review			
Guerard, Michael		4/8/2021	2.25	198.00	445.50
		Sector team debriefs; review EMV tracker, notes			

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7160
Guerard, Michael		4/16/2021	.75	198.00		148.50
		Sector deep dive planning topics w team				
Guerard, Michael		4/20/2021	2.25	198.00		445.50
		Review 3YP commitments to inform Deep Dive topic choices; redline list of options from team				
Guerard, Michael		4/21/2021	1.50	198.00		297.00
		Review PUC IR's on PIM to Grid; sector team chk-in on DD topics				
Guerard, Michael		4/26/2021	1.25	198.00		247.50
		Coord Gas DR mtg team participation; Call w CLF/Crowley on EE and SRP TWGs				
Guerard, Michael		4/27/2021	1.50	198.00		297.00
		Prep for sector deep dive and TWK meetings				
Guerard, Michael		4/29/2021	6.50	198.00		1,287.00
		Present at EE TWG, prep and debriefs; Rez deep dive meeting - Income eligible, prep and debriefs; C&I deep dive meeting -small biz, prep and debriefs				
Guerard, Michael		4/30/2021	.75	198.00		148.50
		Deep dive mtg debriefs, review notes and next steps				
Jacobs, Adam		4/1/2021	1.00	186.00		186.00
		-monthly C&I sector team call				
Jacobs, Adam		4/2/2021	1.25	186.00		232.50
		-check-in w/ Craig on sector team meetings -review notes from April sector team call -send out follow-ups from C&I sector team call -follow-up w/ Daniel Tukey on SEM presentation and industrial initiative				
Jacobs, Adam		4/5/2021	.25	186.00		46.50
		-follow-up w/ Sam on RI C&I EM&V Monthly Check In Agenda baseline ventilation issues				
Jacobs, Adam		4/6/2021	.50	186.00		93.00
		-RI 2022 deep-dive planning cross-sector coordination				
Jacobs, Adam		4/7/2021	.75	186.00		139.50
		-follow-up w/ Craig on 2022 sector team planning meeting scheduling -internal notes/discussion on NGrid SEM presentation from April C&I sector team call -RI daily scrum -RI C&I EM&V Monthly Check In brief discussion of K-12 school HVAC measures				
Jacobs, Adam		4/12/2021	.25	186.00		46.50
		-follow-up email to Josh Kessler RE: introduction Interval Data Systems				
Jacobs, Adam		4/15/2021	.75	186.00		139.50
		-check-in w/ Craig on scheduling 2022 planning meetings -send out 2022 C&I planning meeting invite HOLDS for April, May and June				
Jacobs, Adam		4/16/2021	.25	186.00		46.50
		-review/update C&I C-team Q1 2021 report				
Jacobs, Adam		4/20/2021	.25	186.00		46.50
		-review March C&I data report and draft question on high efficiency air purifier measures				
Jacobs, Adam		4/21/2021	2.00	186.00		372.00
		-follow-up w/ Josh Kessler RE: deep dive topics -internal check-in w/ Mike/Craig on deep dive meeting agendas -assemble reference materials and draft agenda for C&I planning deep dive #1				
Jacobs, Adam		4/22/2021	1.25	186.00		232.50

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7160
		-internal follow-ups w/ Craig/Mike on MPS/data needs for deep dive meetings -finalize and distribute C&I planning deep dive #1 agenda				
Jacobs, Adam		4/26/2021	1.00	186.00		186.00
		-Res/C&I data check-in -gas DR -review MPS data on commercial opportunities for HVAC, hot water and building envelope in retail, food service and food sales -May EERMC meeting notes on presentation prep				
Jacobs, Adam		4/27/2021	1.50	186.00		279.00
		-1/2 daily scrum -2022 Plan C&I Deep Dive Meeting #1 - Small Business (updates for final 3YP filing) -follow-up w/ NGrid on key takeaways from Workforce planning calls during prior planning process -updated agenda/data for C&I sector team deep dive #1				
Jacobs, Adam		4/28/2021	.50	186.00		93.00
		-1/2 RI daily scrum -follow-up w/ Grid RE: Small Biz presentation				
Jacobs, Adam		4/29/2021	1.75	186.00		325.50
		-review NGrid PPT on Small Biz for deep dive meeting #1 -2022 Plan C&I Deep Dive Meeting #1 -May sector team agenda development and distribution				
Jacobs, Adam		4/30/2021	1.50	186.00		279.00
		-EERMC Sector Mtg Topic Prep call -May EERMC meeting prep -distribute follow-up items for C&I deep dive				
Johnson, Craig		4/1/2021	3.25	186.00		604.50
		Prep for Res sector team meeting - review follow-ups from March meeting and February data report, review questions to tee up on implementation and oversight tracker, brainstorm deep dive topics for 2022 planning. April Residential sector team meeting. Protect cells in Implementation and Oversight tracker, upload tracker to OER Sharepoint, send update to sector teams on file availability.				
Johnson, Craig		4/2/2021	.50	186.00		93.00
		Check-in w/ Adam on cross-sector team coordination. Discussed follow-ups from sector team calls, and preparing polls for initial round of 2022 planning meetings.				
Johnson, Craig		4/5/2021	3.00	186.00		558.00
		Prep for 2022 Plan planning deep dive meetings - brainstorm potential ideas for residential deep dive topics, work on development of meeting schedule and structure.				
Johnson, Craig		4/6/2021	.50	186.00		93.00
		Coordinate w/ Adam and Mike on sector team/cross-sector 2022 plan planning deep dive meetings.				
Johnson, Craig		4/7/2021	.75	186.00		139.50
		Monthly check-in meeting w/ EFG - discussed upcoming needs for data review, implementation oversight, and 2022 planning. Prep Q2 work order for EFG.				
Johnson, Craig		4/8/2021	2.00	186.00		372.00
		Prep for 2022 planning deep dive meetings - review 2021 and 2021-2023 plans and brainstorm ideas for meeting topics.				
Johnson, Craig		4/12/2021	1.75	186.00		325.50
		Check when2meet responses for 2022 deep dive planning, send reminders to folks that haven't responded. Prep Q2 work streams for residential sector teams. Review and send final Q2 work order to EFG.				

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7160
Johnson, Craig		4/15/2021	1.50	186.00		279.00
		Review responses for availability for deep dive meetings. Work with Adam to identify dates and times for 3 res, 3 C&I, and 2 x-cutting meetings. Send out meeting invites.				
Johnson, Craig		4/19/2021	1.25	186.00		232.50
		Review Q1 resi data report. Prep and send out request for review to SMAs.				
Johnson, Craig		4/20/2021	.50	186.00		93.00
		Coordinate w/ Adam on drafting agendas, messaging, and expectations for deep dive planning meetings next week.				
Johnson, Craig		4/21/2021	3.50	186.00		651.00
		Talk w/ Adam and Mike re: deep dive planning topics, objectives. Develop agenda for and work on content for deep dive mtg on income eligible programs.				
Johnson, Craig		4/22/2021	4.00	186.00		744.00
		Work on potential content for deep dive mtg on income eligible programs. Finish up detailed agenda for Res IE deep dive meeting, review and discuss w/ Adam and Mike. Send agenda out to meeting participants.				
Johnson, Craig		4/23/2021	4.50	186.00		837.00
		Review Res Q1 data. Review and compile Res C-team questions on Q1 data. Update Implementation and Oversight tracker. Sent update to res and C&I teams on updated versions of tracker, including questions from March data report.				
Johnson, Craig		4/26/2021	9.00	186.00		1,674.00
		Prep data analysis for Income Eligible Deep Dive meeting - 2019/2020 performance, savings by End Use, MPS/Targets, Spending/Savings by CAP territory. Monthly check-in w/ Margie. Mtg. w/ Adrian and Adam to review MPS/Targets workbooks to incorporate data exchange for IE deep dive meeting.				
Johnson, Craig		4/27/2021	.50	186.00		93.00
		Discussion w/ Mike re: additional income eligible data to provide for deep dive planning meeting.				
Johnson, Craig		4/28/2021	2.50	186.00		465.00
		Monthly check-in w/ Richard. Mtg. to prep for IE deep dive w/ Mike and Crystal. Prep for IE deep dive - review shared data, commitments in annual and 3YPs.				
Johnson, Craig		4/29/2021	3.00	186.00		558.00
		Prep for IE deep dive meeting - review 3year plan commitments. Res IE deep dive meeting. Draft agenda for May Res sector team meeting.				
Johnson, Craig		4/30/2021	1.25	186.00		232.50
		Debrief on first sector deep dive meetings w/ Adam and Mike. Outline next steps for research on IES programs following yesterday's deep dive.				
Mosenthal, Philip		4/29/2021	.50	212.00		106.00
		codes and standards re ADR				
Ross, Samuel		4/1/2021	.75	186.00		139.50
		Option value call, prep re: same				
Ross, Samuel		4/2/2021	1.00	186.00		186.00
		reading Synapse studies sent by becca; ex ante study review				
Ross, Samuel		4/5/2021	.75	186.00		139.50
		Distrib C&I agenda, Workforce draft report; email NGrid asking for tracker; brief check-in with Ralph re: upcoming C&I monthly EM&V call				
Ross, Samuel		4/6/2021	.50	186.00		93.00
		EM&V updated agenda,				
Ross, Samuel		4/7/2021	2.50	186.00		465.00
		EM&V C&I monthly call; prep and follow up re: same; workforce study correspondence and distrib updated draft report				

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7160
Ross, Samuel		4/8/2021	1.25	186.00	232.50	
		SRP TWG EERMC Priorities Presentation Prep; team disc. re: work over next week, incl. SRP next steps w/Rachel S. & EMV needed work from subs				
Ross, Samuel		4/9/2021	4.25	186.00	790.50	
		OER data request re: IE data from MPS; acquisition cost estimate, call & correspondence re: same; Jobs study comments consolidation and submission to Grid				
Ross, Samuel		4/12/2021	1.00	186.00	186.00	
		EM&V correspondence and version control re: workforce study; C-team check in on Econ multipliers, prep re: same				
Ross, Samuel		4/14/2021	1.50	186.00	279.00	
		EM&V workforce study full comments; SRP slides continued work				
Ross, Samuel		4/15/2021	1.50	186.00	279.00	
		Appliance recycling call; team check int				
Ross, Samuel		4/19/2021	.75	186.00	139.50	
		SRP YE Report initial look				
Ross, Samuel		4/20/2021	1.25	186.00	232.50	
		cont. SRP YE report review; disc. re: same				
Ross, Samuel		4/21/2021	2.50	186.00	465.00	
		srp TWG, prep & follow up re: same				
Ross, Samuel		4/22/2021	1.75	186.00	325.50	
		PUC data request review & disc; Part & NonPart study in planning context				
Ross, Samuel		4/28/2021	2.25	186.00	418.50	
		EM&V Res monthly call; prep & follow-up re: same				
Ross, Samuel		4/29/2021	1.75	186.00	325.50	
		PUC Hearing, prep & follow up re: same				
Ross, Samuel		4/30/2021	1.25	186.00	232.50	
		EM&V agenda, SRP YE Report comments				
		Totals	127.25		23,086.00	
		Total Labor				23,086.00
					Total this Phase	\$26,922.75

Phase	004	Adv Integ Approaches & Emerging Issues			
Optimal Staff					
			Hours	Rate	Amount
Johnson, Craig		4/9/2021	3.25	186.00	604.50
		Research to help inform OER memo on why peeling off 20% of ee budget and allocating it to non-profits is not a good idea for the energy efficiency programs. Research and analysis included review of CAP performance in RI. Discussion w/ Mike, Adrian, and Sam about the same.			
Johnson, Craig		4/12/2021	.25	186.00	46.50
		Source and send MA/RI cost-to-achieve data to Mike to respond to request from Becca.			
		Totals	3.50		651.00
		Total Labor			651.00

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021	Invoice	7160
			Total this Phase	\$651.00
			Total this Project	\$55,757.50
			Total this Report	\$55,757.50



EcoMetric Consulting, LLC
555 Exton Cms
Exton, PA 19341
610.400.8600
admin@ecometricconsulting.com

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BILLED TO

Mike Guerard
Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

TOTAL DUE

\$2,259.00

Project Name	RI EEMRC Consultant	Invoice Date	04/30/2021
Project #	7395	Due Date	05/30/2021
Invoice #	1029-P4-21	Payment Terms	Net 30
Billing Period	04/03/21 - 04/30/21		

Task Number	Description	Amount
Task 1	EM&V Oversight	\$2,259.00
Task 2	Program Design & Policy	\$0.00

Subtotal	\$2,259.00
Invoice Total	\$2,259.00

Invoice Number 1029-P4-21
Period 04/03/21 - 04/30/21

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	Task 1: EM&V Oversight	Salil Gogte	Partner	2021-04	2.25	\$ 212.00	\$ 477.00
RI EEMRC Consultant	Task 1: EM&V Oversight	Michael Frischmann	Partner	2021-04	0	\$ 212.00	\$ -
RI EEMRC Consultant	Task 1: EM&V Oversight	Michael Honeychuck	Managing Consultant	2021-04	9	\$ 198.00	\$ 1,782.00
RI EEMRC Consultant	Task 1: EM&V Oversight	Bitul Sinha	Sr Engineer	2021-04	0	\$ 160.00	\$ -
RI EEMRC Consultant	Task 1: EM&V Oversight	Divya Prasanna	Project Coordinator	2021-04	0	\$ -	\$ -
Total					11.3		\$ 2,259.00

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	Task 2: Program Design & Policy	Salil Gogte	Partner	2021-04	0	\$ 212.00	\$ -
RI EEMRC Consultant	Task 2: Program Design & Policy	Michael Frischmann	Partner	2021-04	0	\$ 212.00	\$ -
RI EEMRC Consultant	Task 2: Program Design & Policy	Michael Honeychuck	Managing Consultant	2021-04	0	\$ 198.00	\$ -
RI EEMRC Consultant	Task 2: Program Design & Policy	Bitul Sinha	Sr Engineer	2021-04	0	\$ 160.00	\$ -
RI EEMRC Consultant	Task 2: Program Design & Policy	Divya Prasanna	Project Coordinator	2021-04	0	\$ -	\$ -
Total					-		\$ -

Name	Task	Michael	Frischmann	local_date	hours	task	notes
Salil Gogte	Task 1: EM&V Overs	Salil	Gogte	4/12/2021	0.75	EM&V Oversight	review workforce study
Salil Gogte	Task 1: EM&V Overs	Salil	Gogte	4/13/2021	1.5	EM&V Oversight	review workforce study, meet with Mike.
							Monthly C&I call
							Emails
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	4/7/2021	2	EM&V Oversight	Workforce study methodology review
							Emails
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	4/8/2021	1	EM&V Oversight	Workforce study methodology review
							Emails
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	4/9/2021	1	EM&V Oversight	Workforce study methodology review
							Workforce study review
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	4/12/2021	2	EM&V Oversight	Weekly check-in
							Workforce study review
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	4/13/2021	2	EM&V Oversight	Emails
							Emails
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	4/22/2021	0.5	EM&V Oversight	Planning
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	4/28/2021	0.5	EM&V Oversight	Emails

Energy Futures Group, Inc.
PO Box 587
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 4602
Invoice Date: April 30, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services	Amount		
Services Performed 4/1/2021 through 4/30/2021			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	16.00	\$198.00	\$3,168.00
LABOR - Intern Hours	1.75	\$50.00	\$87.50
LABOR - Travel Hours	0.00	\$99.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$3,255.50</u>

Energy Futures Group, Inc.
Services Performed 01/2021 through 03/2021
Consultant

Date	Description of Services	001 - EERMC Oversight	002 - Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
4/2/2021	Draft C&I lighting survey questions; lead C&I lighting call with Ngrid; send out draft survey			2.00			2.00	0.00	2.00
4/6/2021	Coordinate lighting survey logistics w/ Optimal; review SEM slides from Adam			0.50			0.50	0.00	0.50
4/7/2021	Check in with Craig			0.50			0.50	0.00	0.50
4/8/2021	Update to Craig and Mike			0.25			0.25	0.00	0.25
4/13/2021	Discuss lighting survey project with Jazmine			0.25			0.25	0.00	0.25
4/14/2021	Create draft 2 of lighting survey and send to Jazmine for implementation in Survey Monkey			0.50			0.50	0.00	0.50
4/15/2021	Review Survey Monkey draft			0.50			0.50	0.00	0.50
4/16/2021	Final edits to survey and send to NGrid			0.50			0.50	0.00	0.50
4/16/2021	Review scope of work, share with Glenn and Dan, set up TABS billing system			0.75			0.75	0.00	0.75
4/19/2021	Survey corrections			0.25			0.25	0.00	0.25
4/20/2021	Review and comment on RI program data			3.25			3.25	0.00	3.25
4/20/2021	RI data review and send off to Craig			0.25			0.25	0.00	0.25
4/26/2021	Final edits to SurveyMonkey based on Ngrid feedback			0.50			0.50	0.00	0.50
4/27/2021	Review and comment on revised Participant and NP SOW			0.50			0.50	0.00	0.50
4/28/2021	Review and comment on revised Participant and NP study SOW, including redline versions			3.25			3.25	0.00	3.25
4/28/2021	Check in with Craig. Follow up updates to Glenn and Dan.			1.00			1.00	0.00	1.00
4/30/2021	Update Ngrid data dashboard; prep agenda; lead lighting subgroup discussion; respond to Ben's inquiry about literature sources for control savings			1.25			1.25	0.00	1.25
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	16.00	0.00	0.00	16.00	0.00	16.00
	Total Amount	\$0.00	\$0.00	\$3,160.00	\$0.00	\$0.00	\$3,160.00	0.00	\$3,160.00

Energy Futures Group, Inc.
Services Performed 01/2021 through 03/2021
Intern

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
4/13/2021	Meeting w/ Dan about survey			0.25			0.25	0.00	0.25
4/14/2021	Survey Monkey			1.00			1.00	0.00	1.00
4/15/2021	Survey Edits			0.50			0.50	0.00	0.50
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	1.75	0.00	0.00	1.75	0.00	1.75
	Total Amount	\$0.00	\$0.00	\$7.50	\$0.00	\$0.00	\$7.50	0.00	\$7.50

Margie Lynch/Core Energy Insights, Inc.
4445 E. Hoback River Road, Jackson, WY 83001

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 4-2021*
Invoice Date: *April 30, 2021*
OEI Project #: *7395*

Work Performed for National Grid USA Service Company

Description of Services	Amount
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Services Performed 04/01/2021 through 04/30/2021

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	1.50	\$186.00	\$279.00

TOTAL DUE **\$279.00**

Margie Lync Core Energy Insights, Inc.
Services Performed 01/01/2021 through 01/30/2021

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
4/23/2021	Reviewed 1 data and compiled questions for National Grid staff		1.00				1.00	0.00	1.00
4/26/2021	Check in w/C. Johnson		0.50				0.50	0.00	0.50
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	1.50	0.00	0.00	0.00	1.50	0.00	1.50
	Total Amount	\$0.00	\$27.00	\$0.00	\$0.00	\$0.00	\$27.00	0.00	\$27.00

Ralph Prah
7001 Stanhope Place, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 20
Invoice Date: April 30, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 03/01/21 through 04/30/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	19.50	\$198.00	\$3,861.00
LABOR - Travel Hours	0.00	\$99.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$3,861.00</u>

Ralp Pra
Services Performed 03/01/21 through 03/30/21

Date	Description of Services	001 - EERMCOversight	002 - Development of Work Products Rep. of EERMC	003 - EERMC System Reliability Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hrs.
3/1/2021	C&I custom electric impact eval; prep for C&I studies check-in call	0.50					0.50	0.00	0.50
3/2/2021	C&I custom electric impact eval	0.25					0.25	0.00	0.25
6-Mar	C&I custom electric; C&I studies check-in call	1.25					1.25	0.00	1.25
3/12/2021	Sense report; custom electric impact study; ARP study; leg report; participation and MF census study	1.50					1.50	0.00	1.50
3/14/2021	P and NP study workplans	1.25					1.25	0.00	1.25
3/15/2021	participant study workplan	1.00					1.00	0.00	1.00
3/16/2021	coord w/Sam; NP study	0.50					0.50	0.00	0.50
3/17/2021	P and NP study workplans	1.00					1.00	0.00	1.00
3/19/2021	NP study, res agenda	0.25					0.25	0.00	0.25
3/22/2021	Leg study	0.25					0.25	0.00	0.25
3/24/2021	P and NP studies; res studies check-in call	1.25					1.25	0.00	1.25
3/25/2021	e-mail mgmt; coord w/Sam	0.25					0.25	0.00	0.25
4/1/2021	ex-ante review memo, e-mail mgmt	0.25					0.25	0.00	0.25
4/5/2021	check-in call w/Sam, prep for C&I call	0.50					0.50	0.00	0.50
4/6/2021	jobs report	1.00					1.00	0.00	1.00
4/7/2021	C&I studies call; jobs report	1.75					1.75	0.00	1.75
4/8/2021	jobs report	0.75					0.75	0.00	0.75
4/9/2021	jobs report, leg study report	0.50					0.50	0.00	0.50
4/12/2021	jobs report	0.50					0.50	0.00	0.50
4/23/2021	P and NP studies	1.25					1.25	0.00	1.25
4/28/2021	Res studies check-in call; P and NP study res plans; solar inverter study res plan	1.75					1.75	0.00	1.75
4/29/2021	jobs report	0.25					0.25	0.00	0.25
4/30/2021	jobs report; custom impact eval site closure issue; solar inverter study res plan	1.75					1.75	0.00	1.75
							0.00	0.00	0.00
	Total hrs	11.50	0.00	0.00	0.00	0.00	11.50	0.00	11.50
	Total Amount	\$3,611.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,611.00	0.00	\$3,611.00

Rachel Sholly Energy Consulting
48 Hudson St. Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 40
Invoice Date: April 30, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 04/01/21 through 04/30/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	55.00	\$155.00	\$8,525.00
LABOR - Travel Hours	0.00	\$77.50	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$8,525.00</u>

Racell Solly Energy Consulting
Services Performed 01/21 through 03/31/21

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
4/1/2021	Website updates; Optimal weekly scrum & prep; Check-in w/John R.; Sent draft edu agenda internally	1.00	0.25				1.25	-	1.25
4/6/2021	Priorities check-in w/Mike	1.00					1.00	-	1.00
4/7/2021	Reviewed & compiled retreat survey results; Edu call	3.00					3.00	-	3.00
4/8/2021	Optimal weekly scrum & follow-up; Quick review of edu proposals RFP review committee mtg	2.00					2.00	-	2.00
4/9/2021	Website updates	3.25					3.25	-	3.25
4/10/2021	Website updates	1.25					1.25	-	1.25
4/12/2021	Website updates; Quick check-in w/Mike	6.50					6.50	-	6.50
4/13/2021	Website updates; Drafted initial retreat agenda; Retreat planning w/Mike; Priorities planning w/Mike	3.25		0.75			4.00	-	4.00
4/14/2021	Website updates	3.25					3.25	-	3.25
4/15/2021	Website updates; Drafted retreat memo; Drafted website memo; Optimal weekly scrum; Check-in w/Mike - Priorities; Check-in w/Mike - Retreat; Compiled Annual Report second draft; Compiled TWG memo w/slides	6.75	6.50	0.75			14.00	-	14.00
4/16/2021	Posted meeting materials; Reviewed priorities memo & drafted priorities slides	1.00		1.50			2.50	-	2.50
4/20/2021	Website updates & emails; Annual Report data & emails; Posted meeting materials; Website updates	2.25	0.25				2.50	-	2.50
4/21/2021	Posted RFP; Education emails; SRP TWG mtg	2.50					2.50	-	2.50
4/22/2021	Retreat scheduling poll & email; Optimal weekly scrum & Council mtg prep; Prepped retreat talking points; Prepped Annual Report talking points; EERMC mtg - presented Annual Report & Retreat memo	3.50	0.75				4.25	-	4.25
4/23/2021	Council mtg debrief w/Mike & Crystal	0.75					0.75	-	0.75
4/29/2021	NEEP MOU & emails; Drafted & sent edu agenda internally; Updated resources page, posted link to legislated, related communications; CHP mtg planning; Retreat scheduling	1.00	0.25	0.75			2.00	-	2.00
4/30/2021	Website update; CHP mtg planning	0.25	0.75				1.00	-	1.00
Total hours		25.00	7.50	3.75	0.00	0.00	55.00	0.00	55.00
Total Amount		\$6,575.00	\$1,356.25	\$512.50	\$0.00	\$0.00	\$5,525.00	\$0.00	\$5,525.00

Invoice



May 31, 2021
Project No: 7395
Invoice No: 7178

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2021

Professional Services from May 1, 2021 to May 31, 2021

Phase 001 EERMC Oversight

Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	3.00	135.00	405.00	
Guerard, Michael	63.25	198.00	12,523.50	
Johnson, Craig	42.75	186.00	7,951.50	
Totals	109.00		20,880.00	
Total Labor				20,880.00

Subcontractors

Rachel Sholly			5,773.75	
EcoMetric Consulting, LLC			3,728.00	
Total Subcontractors			9,501.75	9,501.75

Total this Phase \$30,381.75

Phase 002 Dev of Work Products & Rep. of EERMC

Optimal Staff

	Hours	Rate	Amount	
Belliveau, Eric	4.00	212.00	848.00	
Guerard, Michael	1.00	198.00	198.00	
Johnson, Crystal	31.00	198.00	6,138.00	
Socks, Matthew	11.25	198.00	2,227.50	
Totals	47.25		9,411.50	
Total Labor				9,411.50

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021	Invoice	7178
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Subcontractors

Core Energy Insights Inc.	1,209.00	
Rachel Sholly	1,433.75	
Total Subcontractors	2,642.75	2,642.75
	Total this Phase	\$12,054.25

Phase	003	EE & System Reliab. Prog. Design & Deliv
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Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	24.50	135.00	3,307.50	
Guerard, Michael	21.50	198.00	4,257.00	
Jacobs, Adam	25.50	186.00	4,743.00	
Johnson, Craig	35.00	186.00	6,510.00	
Ross, Samuel	50.00	186.00	9,300.00	
Totals	156.50		28,117.50	
Total Labor				28,117.50

Subcontractors

Rachel Sholly	310.00	
Jennifer Chiodo	1,138.50	
Energy Futures Group, Inc.	1,039.50	
Total Subcontractors	2,488.00	2,488.00
	Total this Phase	\$30,605.50

Billing Limits

	Current	Prior	To-Date	
Total Billings	73,041.50	207,527.50	280,569.00	
Limit			631,263.00	
Remaining			350,694.00	
			Total this Invoice	\$73,041.50

Billings to Date

	Current	Prior	Total
Labor	58,409.00	160,776.50	219,185.50
Subcontractor	14,632.50	46,751.00	61,383.50
Totals	73,041.50	207,527.50	280,569.00

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Project 7395 Rhode Island EERMC - 2021 Invoice 7178

Billing Backup

Tuesday, June 15, 2021

Optimal Energy Inc.

Invoice 7178 Dated 5/31/2021

8:40:37 AM

Phase 001 EERMC Oversight

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian	5/5/2021		.25	135.00	33.75
		EM&V study review/upload to website			
Caesar, Adrian	5/10/2021		.25	135.00	33.75
		Workforce Analysis report review/summary upload			
Caesar, Adrian	5/27/2021		1.25	135.00	168.75
		EERMC Virtual retreat session 1 equity presentation planning, equity presentation development and revisions			
Caesar, Adrian	5/28/2021		1.25	135.00	168.75
		Virtual retreat prep and presentation finalization, EERMC 2021 annual report upload to home page			
Guerard, Michael	5/3/2021		2.00	198.00	396.00
		Coord team mtgs, set up tasks for May			
Guerard, Michael	5/4/2021		1.50	198.00	297.00
		Reviww/respond to OER on EERMC agenda draft; set up timeline for EERMC presentations			
Guerard, Michael	5/5/2021		3.25	198.00	643.50
		Review/comment on final May agenda; Education wkg grp call, debriefs and follow-up tasks; coord AESC memo drafting			
Guerard, Michael	5/6/2021		.50	198.00	99.00
		Update on AESC w MS			
Guerard, Michael	5/7/2021		3.25	198.00	643.50
		Review PIMs w EB/SR; team check-ins; follow-up w Grid on EE TWG; coord w Grid on Q1 presentation to EERMC; follow-up w Karen V on BPI center			
Guerard, Michael	5/10/2021		4.25	198.00	841.50
		Debrief on PIM ruling with team; OER/Div chk-in call; coord w John R on EERMC presentation; follow-up info sent to P. case			
Guerard, Michael	5/11/2021		2.00	198.00	396.00
		Team prep call for EER C presentations; chk-in w OER, Grid			
Guerard, Michael	5/12/2021		4.25	198.00	841.50
		EERMC Retreat prep call w RS, follow-up tasks; work on EERMC presentations, team coord.;			
Guerard, Michael	5/13/2021		5.50	198.00	1,089.00
		Finalize and send EERMC presentation materials; develop Retreat materials, chk w PUC			
Guerard, Michael	5/14/2021		3.75	198.00	742.50
		Finalize and submit AESC memo to Becca; retreat planning, coord w RS			
Guerard, Michael	5/19/2021		2.75	198.00	544.50
		EERMC mtg prep; Develop Retreat materials for Equity and call with PUC on regulatory presentation			
Guerard, Michael	5/20/2021		6.75	198.00	1,336.50
		Call with PUC on Retreat presentation; EERMC meeting, prep and debriefs			

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Page 3

Project	7395	Rhode Island EERMC - 2021			Invoice	7178
Guerard, Michael		5/21/2021	2.75	198.00		544.50
		Check-in with Team leads; follow-up on EERMC mtg; work on Retreat materials				
Guerard, Michael		5/24/2021	4.25	198.00		841.50
		Chk-in call w Becca; Call with PUC on retreat; team coord on Retreat materials				
Guerard, Michael		5/25/2021	3.75	198.00		742.50
		Foolow-up tasks from EERMC mtg; prep work for retreat; update with team				
Guerard, Michael		5/26/2021	2.50	198.00		495.00
		Retreat prep				
Guerard, Michael		5/27/2021	4.25	198.00		841.50
		Retreat prep; review legislation				
Guerard, Michael		5/28/2021	6.00	198.00		1,188.00
		EERMC Retreat, prep and debriefs; review/feedback on ExComm agenda for OER				
Johnson, Craig		5/4/2021	3.50	186.00		651.00
		Review National Grid year end data for incorporation into EERMC annual report. Update EERMC annual report graphics accordingly. Upload National Grid 2020 Annual Report to Council website.				
Johnson, Craig		5/5/2021	.75	186.00		139.50
		Update EERMC annual report graphics with revised reference loads for percent of sales savings.				
Johnson, Craig		5/6/2021	.25	186.00		46.50
		Review and respond to Adrian/Sam's question re: location of EM&V study one-pagers on Council website. Propose solution for adding one-pagers and archiving inactive EM&V pages.				
Johnson, Craig		5/7/2021	.25	186.00		46.50
		Check-in w/ Adam re: progress and next steps on Council presentations.				
Johnson, Craig		5/10/2021	5.00	186.00		930.00
		Council meeting materials - draft topics to cover in the 2021 and 2021 program results and 2022 plan deep dive meetings presentations. Review and discuss draft outline with Mike and Adam. Update outline and begin to build out outline in presentations.				
Johnson, Craig		5/11/2021	4.00	186.00		744.00
		Check-in w/ internal team on council meeting material development. Check-in mtg w/ National Grid on presentation content. Review 2020 Year-End Report and Q1 data; develop content for EERMC presentation on 2020 year-end results and Q1 2021.				
Johnson, Craig		5/12/2021	5.25	186.00		976.50
		Check-in w/ internal team on council meeting material development. Develop analysis, content, and polishing for 2020 year-end/2021 Q1 update presentation and for 2022 planning deep dive meetings.				
Johnson, Craig		5/13/2021	5.00	186.00		930.00
		Finish content for 2020 year-end/2021 Q1 update presentation and merge Adam and Adrian decks. Polish presentations. Finish content and polish 2022 Plan Deep Dive Meeting presentation. Check-in w/ Mike, Sam, and Rachel on council meeting material development. Review and provide comments on Council year-end report.				
Johnson, Craig		5/17/2021	1.25	186.00		232.50
		Coordinate w/ Adam on Council Meeting Presentations for Thursday. Prep for Council meeting w/ Adam. Update 2020 Year-End/2021 Q1 report, reissue to Becca.				
Johnson, Craig		5/20/2021	5.25	186.00		976.50

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Project	7395	Rhode Island EERMC - 2021	Invoice	7178
		Check-in w/ internal team re: prep for Council meeting. Council meeting prep - review slides and prepare talking points. Council Retreat prep - discuss needs w/ Mike, Rachel, and Crystal. Attend and present at Council Meeting.		
Johnson, Craig	5/24/2021	2.00	186.00	372.00
		Check-in w/ Crystal, Rachel and Mike re: equity presentation and content for Council retreat. Discuss data availability to help inform equity presentation w/ Crystal and Adrian. Check-in w/ Mike and Rachel on Council Retreat hosting logistics.		
Johnson, Craig	5/25/2021	.50	186.00	93.00
		Check-in mtg. w/ Mike, Crystal, and Rachel on equity presentation for Council retreat.		
Johnson, Craig	5/26/2021	.25	186.00	46.50
		Coordinate w/ internal team on final prep for Council retreat.		
Johnson, Craig	5/27/2021	5.50	186.00	1,023.00
		Review Equity presentation deck for Council retreat with internal team. Update graphics, and polish formatting throughout. Review, updated, and polish council background member experience slide deck.		
Johnson, Craig	5/28/2021	4.00	186.00	744.00
		Prep for Council retreat with internal team. Council Retreat.		
		Totals	109.00	20,880.00
		Total Labor		20,880.00
			Total this Phase	\$30,381.75

Phase	002	Dev of Work Products & Rep. of EERMC	Hours	Rate	Amount
Optimal Staff					
Belliveau, Eric	5/7/2021	PIM call	.50	212.00	106.00
Belliveau, Eric	5/10/2021	PIM call and prep with MG	.75	212.00	159.00
Belliveau, Eric	5/14/2021	team check in	.75	212.00	159.00
Belliveau, Eric	5/21/2021	leads meeting, disc with MG	1.00	212.00	212.00
Belliveau, Eric	5/28/2021	team check in	1.00	212.00	212.00
Guerard, Michael	5/4/2021	Chk-in w RS on Annual report, retreat, Educ group	1.00	198.00	198.00
Johnson, Crystal	5/5/2021	Update - retreat meeting	.50	198.00	99.00
Johnson, Crystal	5/20/2021	RI Retreat Meeting	1.00	198.00	198.00
Johnson, Crystal	5/21/2021	RI EERMC Retreat Draft Slides	2.50	198.00	495.00
Johnson, Crystal	5/24/2021	EERMC Retreat - Equity Presentation Development and meeting	4.00	198.00	792.00

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Project	7395	Rhode Island EERMC - 2021		Invoice	7178
Johnson, Crystal		5/25/2021	5.00	198.00	990.00
		EERMC Retreat - Equity Presentation Development and meeting			
Johnson, Crystal		5/26/2021	4.00	198.00	792.00
		Retreat Slides research and updating			
Johnson, Crystal		5/27/2021	7.00	198.00	1,386.00
		National Grid technical meeting, EERMC Equity Presentation development and meeting			
Johnson, Crystal		5/28/2021	7.00	198.00	1,386.00
		EERMC Equity Presentation final prep, prep meeting and retreat			
Socks, Matthew		5/6/2021	.50	198.00	99.00
		Discuss RI EERMC AESC summary memo w/ M.Guerard			
Socks, Matthew		5/13/2021	5.75	198.00	1,138.50
		Developing RI EERMC AESC summary memo; Participate in AESC Study Group call re: sensitivity analysis results, updating B.Trietch re: same			
Socks, Matthew		5/14/2021	5.00	198.00	990.00
		Developing RI EERMC AESC summary memo; updating final 2021-2023 BCR models w/ final 2021 AESC avoided costs for impacts analysis; Reviewing SRP TRM			
		Totals	47.25		9,411.50
		Total Labor			9,411.50
				Total this Phase	\$12,054.25

Phase 003 EE & System Reliab. Prog. Design & Deliv

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian		5/3/2021	1.25	135.00	168.75
		ConnectedSolutions Active Demand data collection/summary			
Caesar, Adrian		5/4/2021	2.75	135.00	371.25
		Monthly data reminders and tracker update, 2020 NGrid Year-End Report review and year-end data update			
Caesar, Adrian		5/6/2021	3.50	135.00	472.50
		C&I/Res Sector team mtg prep/notetaking/follow ups			
Caesar, Adrian		5/7/2021	.75	135.00	101.25
		RI data report update and upload to Sharepoint			
Caesar, Adrian		5/10/2021	3.75	135.00	506.25
		May EERMC meeting prep, 2020 YE/2021 Q1 report discussion, ADR participant data summary, program performance charts 2020 and 2020 Q4/YE deltas			
Caesar, Adrian		5/11/2021	.25	135.00	33.75
		2020 YE/2021 Q1 presentation development			
Caesar, Adrian		5/12/2021	2.00	135.00	270.00
		2020 YE/2021 Q1 presentation development and review			
Caesar, Adrian		5/17/2021	3.25	135.00	438.75
		C&I April data review and report development, Active Demand Deep Dive meeting prep, notetaking, and follow ups			

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Project	7395	Rhode Island EERMC - 2021			Invoice	7178
Caesar, Adrian		5/18/2021	3.00	135.00		405.00
	2020 detailed NGrid Year end data review and comps to preliminary data, outreach re: April Res Program/Spending data, April Res data review and April data report development					
Caesar, Adrian		5/19/2021	.25	135.00		33.75
	April Res data report distribution and April data reports upload to Sharepoint					
Caesar, Adrian		5/24/2021	.75	135.00		101.25
	RI Equity/EWG presentation planning					
Caesar, Adrian		5/25/2021	2.00	135.00		270.00
	Res deep dive mtg prep, notetaking, and follow-ups					
Caesar, Adrian		5/27/2021	1.00	135.00		135.00
	Confidential cost schedules initial review, Internal check-in re: cost schedule analysis process					
Guerard, Michael		5/3/2021	3.25	198.00		643.50
	Sector deep dive planning w team, follow-up; review sector data					
Guerard, Michael		5/4/2021	.50	198.00		99.00
	Review Gas DR summary from Grid					
Guerard, Michael		5/5/2021	2.00	198.00		396.00
	C&I EMV monthly call; Gas DR call, prep and debriefs w AJ; check-in w H4H on BPI training center in PVD					
Guerard, Michael		5/6/2021	4.50	198.00		891.00
	Monthly rez sector mtg, prep, debrief and next steps w CJ; monthly C&I mtg debrief					
Guerard, Michael		5/18/2021	.75	198.00		148.50
	Coord w CJ on deep dive topics for rez					
Guerard, Michael		5/19/2021	2.25	198.00		445.50
	MF mtg w Grid, debrief w CJ; chk-in on SRP TWG					
Guerard, Michael		5/21/2021	1.75	198.00		346.50
	Review confidential schedules on 2020 year-end report					
Guerard, Michael		5/24/2021	1.00	198.00		198.00
	C&I EMV monthly call					
Guerard, Michael		5/25/2021	2.25	198.00		445.50
	Rez deep dive mtg on MF, prep and debriefs					
Guerard, Michael		5/27/2021	2.00	198.00		396.00
	EE TWG mtg, debriefs; review deep dive schedule					
Guerard, Michael		5/28/2021	1.25	198.00		247.50
	Coordinate prep for June sector meetings					
Jacobs, Adam		5/3/2021	1.75	186.00		325.50
	-2021 RI Annual CHP Stakeholder Meeting coordination -follow-up on workforce development notes w/ Josh Kessler -Deep Dive Debrief and ID Upcoming Deep Dive Topics (call w/ Craig and Mike) -confirm Jen Chiodo availability for C&I planning Deep Dives 2&3					
Jacobs, Adam		5/4/2021	.25	186.00		46.50
	-1/2 RI daily scrum					
Jacobs, Adam		5/5/2021	1.75	186.00		325.50
	-1/2 RI daily scrum (EM&V school IAQ memos) -review Aquidneck Island Long-Term Gas Capacity Study -Gas Demand Response Discussion -follow-ups w/ Rachel on Annual CHP forum					

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Project	7395	Rhode Island EERMC - 2021			Invoice	7178
Jacobs, Adam		5/6/2021	1.25	186.00	232.50	
		-Monthly C&I sector team call -follow-up on K-12 ventilation measure EM&V				
Jacobs, Adam		5/7/2021	.50	186.00	93.00	
		-check-in w/ Craig on May EERMC meeting materials and cross-cutting ADM agenda				
Jacobs, Adam		5/10/2021	1.25	186.00	232.50	
		-May EERMC meeting prep/presentation development -Cross-cutting active demand agenda development -distribute May C&I sector team call follow-ups				
Jacobs, Adam		5/11/2021	.75	186.00	139.50	
		-review NGrid Q1 2021 and YE 2020 program highlight slides -EERMC Topics Discussion - C-Team & NGrid				
Jacobs, Adam		5/12/2021	3.00	186.00	558.00	
		-RI daily scrum -draft C&I sections of 2020/Q1-2021 presentation materials for May EERMC meeting -draft C&I sections of 2022 deep dives presentation for May EERMC meeting				
Jacobs, Adam		5/13/2021	.75	186.00	139.50	
		-NGrid follow-ups from May C&I sector team meeting -check-in w/ Josh on upcoming C&I sector team calls and Deep Dives				
Jacobs, Adam		5/14/2021	1.00	186.00	186.00	
		-RI leads check-in call				
Jacobs, Adam		5/17/2021	2.25	186.00	418.50	
		-Active demand prep call w/ Craig -Cross Cutting Planning Deep Dive #1 -debrief notes w/ Craig on Active Demand evaluations in MA/RI -council meeting presentation prep				
Jacobs, Adam		5/18/2021	1.25	186.00	232.50	
		-update committment tracker w/ Grid details on Quonset Development Corp (QDC) trainings -check in w/ subs on Deep Dive #2 agenda -assemble relevant new construction data for Deep Dive #2 -draft C&I deep dive #2 agenda				
Jacobs, Adam		5/19/2021	.25	186.00	46.50	
		-distribute C&I deep dive #2 agenda				
Jacobs, Adam		5/20/2021	2.25	186.00	418.50	
		-1/2 RI daily scrum -note to NGrid on C&I RFP SOWs for C-team review -EERMC meeting/presentation				
Jacobs, Adam		5/21/2021	1.25	186.00	232.50	
		-RI team leads check-in -questions to Grid for June C&I sector call -follow-up w/ Grid on councilor CHP questions				
Jacobs, Adam		5/24/2021	.75	186.00	139.50	
		-share small biz slides from MA equity working group and notes on discussion for RI -discussion of MA C&I EM&V Study Results use in RI				
Jacobs, Adam		5/25/2021	.25	186.00	46.50	
		-prep for C&I planning deep dive #2				
Jacobs, Adam		5/26/2021	1.25	186.00	232.50	

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Project	7395	Rhode Island EERMC - 2021			Invoice	7178
		-2022 Plan C&I Deep Dive Meeting #2				
		-clean-up notes/draft follow-ups from C&I Deep Dive #2				
Jacobs, Adam		5/27/2021	.75	186.00		139.50
		-draft and send June C&I sector team call agenda				
Jacobs, Adam		5/28/2021	3.00	186.00		558.00
		-RI leads check-in call				
		-small biz slide for Equity deck				
		-1/2 EERMC Retreat Session 1				
Johnson, Craig		5/3/2021	2.25	186.00		418.50
		2022 planning deep dive meetings - Meeting w/ Mike and Adam to discuss meeting and possible agenda topics for cross-cutting meetings. Update meeting invites for cross-cutting meetings. Review and discuss residential meeting topics for May and June res deep dive meetings.				
Johnson, Craig		5/4/2021	.75	186.00		139.50
		Request access to OER SharePoint for C-Team subcontractors. Forward meeting invite and materials to subcontractors for May monthly res sector team meeting. Review National Grid responses to C-Team questions on Q1 data. AM check-in mtg. with internal team discussing items above.				
Johnson, Craig		5/6/2021	6.25	186.00		1,162.50
		Check-in w/ Margie re: availability for res sector team meeting. Discussion w/ Laura R. and Mike R. re: additional IES SF data that they can provide. Set up and send out new meeting invite for residential sector team meetings. Send out updates for Res Deep Dive meetings. Residential sector team meeting; meeting prep including review of outstanding items from last sector team meeting, updates on deep dive meetings, commitments tracker and Ngrid responses to C-Team questions on Q1 data. Debrief on Res meeting with Mike. Discuss follow-up items, additional questions on program performance for IE and MF programs, strategy/brainstorming re: ways to address MF program issues and prep thoughts for MF deep dive meeting, status of RFP updates.				
Johnson, Craig		5/7/2021	2.75	186.00		511.50
		Check-in w/ Adam on agenda development for active demand deep dive meeting. Draft agenda for active demand deep dive meeting. Compile and send out res sector team meeting follow-up items.				
Johnson, Craig		5/10/2021	.75	186.00		139.50
		Discuss Active demand deep dive agenda with Mike, Adrian, and Adam. Finalize agenda and data and distribute to meeting attendees.				
Johnson, Craig		5/13/2021	1.25	186.00		232.50
		Review National Grid Q1 Report. Update Quarterly tracking workbooks. Reach out to Angela re: HER 3.0 example that we were expecting to be included in the Q1 report. Review final 2020 year-end raw data.				
Johnson, Craig		5/17/2021	3.00	186.00		558.00
		Coordinate and prep w/ Adam on Active Demand Deep Dive Meeting. Facilitate Active Demand Response 2020 Planning Deep Dive Meeting. Meeting debrief and compile follow-up items to distribute to meeting participants. E-mails w/ Adrian and Adam re: raw program data for April from Grid. Send HER 3.0 mockup example to res sector team call folks.				
Johnson, Craig		5/18/2021	2.00	186.00		372.00
		Respond to Sam's poll on availability for EM&V call. Respond to Jill's question re: Ngrid's answers to C-Team follow-up questions on MF programs from May sector team meeting. Draft MF Deep Dive Agenda. Work on data materials to share in advance of the meeting.				
Johnson, Craig		5/19/2021	5.75	186.00		1,069.50

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Project	7395	Rhode Island EERMC - 2021			Invoice	7178
		Review Ngrid responses to follow-up questions on MF programs from May res sector team meeting. Add responses to questions and commitments trackers. Prepare data for MF Deep Dive meeting. Coordinate and check-in w/ Jill and Jen at National Grid on MF programs.				
Johnson, Craig	5/21/2021	3.00	186.00		558.00	
		C-Team Internal Leads check-in meeting. Discuss upcoming sector meetings, planning deep dives, and status of RFPs. Review April Resi data report. Develop and send questions to National Grid.				
Johnson, Craig	5/24/2021	.50	186.00		93.00	
		EM&V Call to review incorporation of MA studies in RI Res programs for 2022 Planning.				
Johnson, Craig	5/25/2021	2.50	186.00		465.00	
		2020 Plan Resi Deep Dive Meeting on Multifamily programs; associated meeting prep and debrief.				
Johnson, Craig	5/26/2021	2.25	186.00		418.50	
		RI Monthly EM&V meeting. Draft Residential Monthly Sector Team Agenda. Check-in w/ internal team re: same.				
Johnson, Craig	5/27/2021	2.00	186.00		372.00	
		Draft and Prep for Residential Monthly Sector Team meeting. Review and flag unanswered/incomplete responses for Q1 commitments to include in agenda. Send out meeting agenda. Review NDA schedules with Adrian.				
Ross, Samuel	5/4/2021	2.00	186.00		372.00	
		draft SRP slides				
Ross, Samuel	5/5/2021	5.00	186.00		930.00	
		Finish, distribute draft SRP Slides EM&V C&I Check In call; share corrections to SRP slides with OER; FRSO One pager review and finalization; Lighting study follow-up				
Ross, Samuel	5/6/2021	5.00	186.00		930.00	
		One-pagers on website debug; update schd cadence for, monthly check in w/EcoMetric on EM&V; combine and share C-Team & OER comments on Part & NP studies; Workforce two-pager vs. 1-pager correspondence; appliance recycling survey comments scheduling; Gas DR Pilot email response to G. Lawrence; cust gas review correspondence w/CTeam and OER; school HVAC baseline results from MA - coord w/sector team;				
Ross, Samuel	5/7/2021	3.50	186.00		651.00	
		PUC rulings internal disc; active DR MPS results refresher for sector teams; distribute updated slides to Matt C. for SRP; finalize C-Team/OER comments on solar inverter study				
Ross, Samuel	5/10/2021	2.50	186.00		465.00	
		PUC ruling debrief, prep re: same; C-Team Check In; workforce study finalization				
Ross, Samuel	5/11/2021	.75	186.00		139.50	
		initial work on Council materials re: SRP and PUC PIM rulings				
Ross, Samuel	5/12/2021	6.25	186.00		1,162.50	
		Finalize SRP TWG slides; finish first draft SRP materials, solicit feedback re: same; develop PUC PIM ruling memo; review livestream recording				
Ross, Samuel	5/13/2021	5.00	186.00		930.00	
		Finalize Council materials - SRP memo & 2020 summary slide (call w/Becca re: same); PUC PIM findings slides and memo finalization				
Ross, Samuel	5/14/2021	3.75	186.00		697.50	

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7178	
		RI Team Leads weekly call; SRP TRM Comments finalization; Appliance recycling & Res Gas pk demand comments finalization; EM&V MA study cross-over poll distribution					
Ross, Samuel		5/17/2021	.50	186.00	93.00		
		RI NWA AESC update review correspondence w/M socks					
Ross, Samuel		5/18/2021	.50	186.00	93.00		
		RI team check in					
Ross, Samuel		5/19/2021	3.25	186.00	604.50		
		SRP TWG, prep & follow-up re: same; EM&V MA study cross over sched					
Ross, Samuel		5/20/2021	3.25	186.00	604.50		
		RI Council mtg; prep and follow-up re: same					
Ross, Samuel		5/21/2021	1.25	186.00	232.50		
		RI Leads weekly check in; EM&V study dist					
Ross, Samuel		5/24/2021	1.75	186.00	325.50		
		MA EM&V study crossover, SRP comment letter revisions per Council Vote					
Ross, Samuel		5/26/2021	2.50	186.00	465.00		
		EM&V Res call; follow-up re: same					
Ross, Samuel		5/27/2021	.75	186.00	139.50		
		SRP filing correspondence; Appliance Recycling survey comments					
Ross, Samuel		5/31/2021	2.50	186.00	465.00		
		EM&V C&I Agenda, correspondence re: K-12 ventilation work in RI, corresp. re: part/nonpart workplans, SEM one-pager, gas peak dmd study					
		Totals		156.50	28,117.50		
		Total Labor				28,117.50	
				Total this Phase		\$30,605.50	
				Total this Project		\$73,041.50	
				Total this Report		\$73,041.50	



EcoMetric Consulting, LLC
555 Exton Cms
Exton, PA 19341
610.400.8600
admin@ecometricconsulting.com

I N V O I C E

BILLED TO

Mike Guerard
Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

TOTAL DUE

\$3,728.00

Project Name	RI EEMRC Consultant	Invoice Date	06/07/2021
Project #	7395	Due Date	07/07/2021
Invoice #	1029-P5-21	Payment Terms	Net 30
Billing Period	05/01/21 - 05/28/21		

Task Number	Description	Amount
Task 1	EM&V Oversight	\$3,728.00
Task 2	Program Design & Policy	\$0.00

Subtotal	\$3,728.00
Invoice Total	\$3,728.00

Invoice Number 1029-P5-21
Period 05/01/21 - 05/28/21

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	Task 1: EM&V Oversight	Salil Gogte	Partner	2021-05	3	\$ 212.00	\$ 636.00
RI EEMRC Consultant	Task 1: EM&V Oversight	Michael Frischmann	Partner	2021-05	0	\$ 212.00	\$ -
RI EEMRC Consultant	Task 1: EM&V Oversight	Michael Honeychuck	Managing Consultant	2021-05	14	\$ 198.00	\$ 2,772.00
RI EEMRC Consultant	Task 1: EM&V Oversight	Bitul Sinha	Sr Engineer	2021-05	2	\$ 160.00	\$ 320.00
RI EEMRC Consultant	Task 1: EM&V Oversight	Divya Prasanna	Project Coordinator	2021-05	0	\$ -	\$ -
Total					19.0		\$ 3,728.00

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	Task 2: Program Design & Policy	Salil Gogte	Partner	2021-05	0	\$ 212.00	\$ -
RI EEMRC Consultant	Task 2: Program Design & Policy	Michael Frischmann	Partner	2021-05	0	\$ 212.00	\$ -
RI EEMRC Consultant	Task 2: Program Design & Policy	Michael Honeychuck	Managing Consultant	2021-05	0	\$ 198.00	\$ -
RI EEMRC Consultant	Task 2: Program Design & Policy	Bitul Sinha	Sr Engineer	2021-05	0	\$ 160.00	\$ -
RI EEMRC Consultant	Task 2: Program Design & Policy	Divya Prasanna	Project Coordinator	2021-05	0	\$ -	\$ -
Total					-		\$ -

Name	Task	Michael	Frischmann	local_date	hours	task	notes
Salil Gogte	Task 1: EM&V Overs	Salil	Gogte	5/17/2021	1	EM&V Oversight	review baseiine adjustments memo
Salil Gogte	Task 1: EM&V Overs	Salil	Gogte	5/18/2021	1	EM&V Oversight	project management
Salil Gogte	Task 1: EM&V Overs	Salil	Gogte	5/24/2021	1	EM&V Oversight	RI c-team meetings
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	5/5/2021	1	EM&V Oversight	Monthly C&I EM&V call
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	5/6/2021	1	EM&V Oversight	Solar inverter workplan review Review solar inverter study
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	5/10/2021	2	EM&V Oversight	Emails Review residential gas peak demand study
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	5/13/2021	2	EM&V Oversight	Emails Review school ventilation documents
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	5/17/2021	1	EM&V Oversight	Planning Review school ventilation documents
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	5/19/2021	1	EM&V Oversight	Planning C&I and Res study results calls
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	5/24/2021	2	EM&V Oversight	Weekly check-in Monthly Res call
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	5/26/2021	3	EM&V Oversight	Discussions about appliance recycling postcard & survey Review ventilation baseline documents
Michael Honeychuck	Task 1: EM&V Overs	Michael	Honeychuck	5/27/2021	1	EM&V Oversight	Emails
Bitul Sinha	Task 1: EM&V Overs	Bitul	Sinha	5/26/2021	2	EM&V Oversight	Recycle appliance memo and survey q review

Energy Futures Group, Inc.
PO Box 587
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 4659
Invoice Date: May 31, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services	Hours	Hourly Rate	Amount
Services Performed 5/1/2021 through 5/31/2021			
LABOR - Regular Hours	5.25	\$198.00	\$1,039.50
LABOR - Intern Hours	0.00	\$50.00	\$0.00
LABOR - Travel Hours	0.00	\$99.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$1,039.50</u>

Energy Futures Group, Inc.

Services Performed 5/1/2021 to 5/31/2021

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
5/4/2021	Survey edits based on Ben's feedback			0.50			0.50	0.00	0.50
5/6/2021	Res. Sector Team call, review of monthly data			1.50			1.50	0.00	1.50
5/21/2021	Review initial survey responses			0.25			0.25	0.00	0.25
5/26/2021	Check in with Craig Johnson, notes out to Glenn and Dan.			0.75			0.75	0.00	0.75
5/28/2021	Summarize results from upstream lighting distributor survey; lead lighting meeting with Ngrid; send out notes/materials			2.25			2.25	0.00	2.25
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	5.25	0.00	0.00	5.25	0.00	5.25
	Total Amount	\$0.00	\$0.00	\$1,031.50	\$0.00	\$0.00	\$1,031.50	0.00	\$1,031.50

Pay to: Jennifer Chiodo
JLC Consulting, LLC
52 Bent Creek Road
Hinesburg, VT 05460

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-2021.02*
Invoice Date: *May 31, 2021*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 4/1/2021 through 5/31/2021			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	5.75	\$198.00	\$1,138.50
LABOR - Travel Hours	0.00	\$99.00	\$0.00
(See attached for breakdown by EEAC Team/Task and description of services.)			
Travel Expenses			\$0.00
(See attached travel expense form for details.)			
TOTAL DUE			<u>\$1,138.50</u>

Pay to Jennifer Ciodo
Services Performed 01/2021 through 5/31/2021

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
4/1/21	RI Sector Team meeting			1.50			1.50	0.00	1.50
5/25/21	C&I NC deep dive prep			2.00			2.00	0.00	2.00
5/26/2021	C&I NC deep dive mtg and follow up			2.25			2.25	0.00	2.25
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	5.75	0.00	0.00	5.75	0.00	5.75
	Total Amount	\$0.00	\$0.00	\$1,130.50	\$0.00	\$0.00	\$1,130.50	0.00	\$1,130.50

Margie Lynch/Core Energy Insights, Inc.
4445 E. Hoback River Road, Jackson, WY 83001

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 5-2021*
Invoice Date: *May 31, 2021*
OEI Project #: *7395*

Work Performed for National Grid USA Service Company

Description of Services	Amount
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Services Performed 05/01/2021 through 05/31/2021

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	6.50	\$186.00	\$1,209.00

TOTAL DUE **\$1,209.00**

Margie Lync Core Energy Insights, Inc.
Services Performed 05/01/2021 through 05/31/2021

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
5/5/2021	Reviewed responses to questions on 1 data		0.50				0.50	0.00	0.50
5/6/2021	Participated in res sector meeting		1.00				1.00	0.00	1.00
5/23/2021	Researched resources to share for MF Deep Dive		1.00				1.00	0.00	1.00
5/24/2021	Continued MF research and compiled summary of same		0.50				0.50	0.00	0.50
5/25/2021	Prepared for and participated in MF Deep Dive meeting		1.25				1.25	0.00	1.25
5/27/2021	Discussed equity presentation to Council retreat w/C. Johnson; contributed to same		1.50				1.50	0.00	1.50
5/28/2021	Participated in equity topic presentation and discussion at Council's retreat		0.75				0.75	0.00	0.75
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	6.50	0.00	0.00	0.00	6.50	0.00	6.50
	Total Amount	\$0.00	\$1,200.00	\$0.00	\$0.00	\$0.00	\$1,200.00	0.00	\$1,200.00

Rachel Sholly Energy Consulting
48 Hudson St. Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 41
Invoice Date: May 31, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 05/01/21 through 05/31/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	48.50	\$155.00	\$7,517.50
LABOR - Travel Hours	0.00	\$77.50	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$7,517.50</u>

Raciel Solly Energy Consulting
Services Performed 05/01/21 through 05/31/21

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
05/04/21	Check-in w/Mike; Finalized & sent Edu agenda & materials; Retreat scheduling	1.75					1.75	0.00	1.75
05/05/21	Annual Report final draft; Edu mtg prep; Edu mtg & follow up; CHP mtg planning; CHP mtg planning - scheduling, registration form, website posting	2.00		1.50			3.50	0.00	3.50
05/06/21	Optimal weekly scrum; Updated RFP page; Added one pagers to EM&V section of website	1.75					1.75	0.00	1.75
05/10/21	Compiled final report		4.50				4.50	0.00	4.50
05/11/21	Compiled final report; Retreat planning; CHP mtg planning	0.25	3.50	0.25			4.00	0.00	4.00
05/12/21	Retreat planning	0.50					0.50	0.00	0.50
05/13/21	Optimal weekly scrum; Retreat check-in w/Becca; Compiled final report; Retreat planning; Posted meeting materials; Posted Grid's 1 report & 2021 Annual Report	3.75	1.25				5.00	0.00	5.00
05/14/21	Retreat planning; Posted meeting materials	0.25					0.25	0.00	0.25
05/19/21	Retreat planning	1.00					1.00	0.00	1.00
05/20/21	Optimal weekly scrum; Retreat planning w/Mike; Retreat planning w/Crystal & follow-up; EERMC mtg	3.50					3.50	0.00	3.50
05/21/21	Posted materials to website; Retreat prep - equity	0.50					0.50	0.00	0.50
05/24/21	Retreat prep mtg - equity, slides	3.00					3.00	0.00	3.00
05/25/21	Retreat prep - slides; Chat w/Becca re: room; Updated Council meeting times on website; Posted retreat; Retreat check-in	3.75					3.75	0.00	3.75
05/26/21	Optimal weekly scrum; Retreat prep w/Mike & follow-up	2.25					2.25	0.00	2.25
05/27/21	Retreat prep - slide development; EE TWG meeting - EWG presentation & took notes; Retreat prep - slide development; Retreat check-in - slide review; Website updates - Tony's photo; Retreat prep - talking points	8.00					8.00	0.00	8.00
05/28/21	Retreat check-in - slide review; Retreat Session #1	4.50					4.50	0.00	4.50
05/31/21	Canceled edu mtg; CHP registrations; Updated / posted materials for ExComm mtg; Posted mtg minutes	0.50		0.25			0.75		0.75
	Total hours	37.25	1.25	2.00	0.00	0.00	11.50	0.00	11.50
	Total Amount	\$5,773.75	\$1,133.75	\$310.00	\$0.00	\$0.00	\$7,517.50	0.00	\$7,517.50

Invoice



June 30, 2021
Project No: 7395
Invoice No: 7197

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2021

Professional Services from June 1, 2021 to June 30, 2021

Phase 001 EERMC Oversight

Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	.25	135.00	33.75	
Guerard, Michael	46.50	198.00	9,207.00	
Johnson, Craig	11.50	186.00	2,139.00	
Totals	58.25		11,379.75	
Total Labor				11,379.75

Subcontractors

Rachel Sholly			1,898.75	
EcoMetric Consulting, LLC			5,398.00	
Ralph Prah			4,059.00	
Total Subcontractors			11,355.75	11,355.75

Total this Phase \$22,735.50

Phase 002 Dev of Work Products & Rep. of EERMC

Optimal Staff

	Hours	Rate	Amount	
Belliveau, Eric	2.00	212.00	424.00	
Johnson, Crystal	.50	198.00	99.00	
Ross, Samuel	4.75	186.00	883.50	
Totals	7.25		1,406.50	
Total Labor				1,406.50

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021	Invoice	7197
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Subcontractors

Core Energy Insights Inc.	465.00		
EcoMetric Consulting, LLC	3,609.00		
Total Subcontractors	4,074.00		4,074.00
		Total this Phase	\$5,480.50

Phase	003	EE & System Reliab. Prog. Design & Deliv		
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Optimal Staff

	Hours	Rate	Amount
Caesar, Adrian	21.75	135.00	2,936.25
Guerard, Michael	33.75	198.00	6,682.50
Jacobs, Adam	25.75	186.00	4,789.50
Johnson, Craig	38.75	186.00	7,207.50
Ross, Samuel	39.25	186.00	7,300.50
Totals	159.25		28,916.25
Total Labor			28,916.25

Subcontractors

Rachel Sholly		542.50	
Jennifer Chiodo		1,039.50	
Energy Futures Group, Inc.		1,336.50	
Total Subcontractors		2,918.50	2,918.50
		Total this Phase	\$31,834.75

Phase	004	Adv Integ Approaches & Emerging Issues		
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Optimal Staff

	Hours	Rate	Amount
Guerard, Michael	2.50	198.00	495.00
Johnson, Craig	.50	186.00	93.00
Totals	3.00		588.00
Total Labor			588.00
		Total this Phase	\$588.00

Billing Limits

	Current	Prior	To-Date
Total Billings	60,638.75	280,569.00	341,207.75
Limit			631,263.00
Remaining			290,055.25
		Total this Invoice	\$60,638.75

Billings to Date

	Current	Prior	Total
Labor	42,290.50	219,185.50	261,476.00

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021		Invoice	7197
Subcontractor		18,348.25	61,383.50		79,731.75
Totals		60,638.75	280,569.00		341,207.75

Project 7395 Rhode Island EERMC - 2021 Invoice 7197

Billing Backup

Monday, July 26, 2021

Optimal Energy Inc.

Invoice 7197 Dated 6/30/2021

1:33:53 PM

Phase 001 EERMC Oversight

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian	6/9/2021		.25	135.00	33.75
	EERMC June Mtg. materials upload				
Guerard, Michael	6/1/2021		2.25	198.00	445.50
	Review EERMC's SRP filing by Marisa; review/edit draft EERMC June agenda from OER; provide proposed mod to ExComm agenda to OER and prep for meeting				
Guerard, Michael	6/2/2021		1.50	198.00	297.00
	Retreat debrief, set up follow-up tasks; EERMC ExComm mtg prep				
Guerard, Michael	6/3/2021		3.00	198.00	594.00
	EERMC ExComm mtg, prep and debrief; Retreat follow-up task work				
Guerard, Michael	6/4/2021		.75	198.00	148.50
	Check-in mtg with team leads				
Guerard, Michael	6/7/2021		.50	198.00	99.00
	Retreat follow-up				
Guerard, Michael	6/8/2021		4.75	198.00	940.50
	Draft follow-up note for PUC chair post-retreat, coordinate with OER submitting via Tony; EERMC mtg material development; check-in call w OER/Grid				
Guerard, Michael	6/9/2021		3.50	198.00	693.00
	EERMC mtg material development, team updates				
Guerard, Michael	6/10/2021		4.25	198.00	841.50
	Finalize and post EERMC mtg materials; send note to Tony on proposed letter to Ron/PUC as retreat follow-up				
Guerard, Michael	6/14/2021		5.50	198.00	1,089.00
	EERMC mtg prep; chk-in with Nathan/OER on EERMC mtg materials; follow-up with Tony on PUC letter				
Guerard, Michael	6/15/2021		3.25	198.00	643.50
	EERMC mtg prep; chk-in w OER				
Guerard, Michael	6/16/2021		3.50	198.00	693.00
	Follow-up w Tony - PUC, equity; EERMC mtg prep				
Guerard, Michael	6/17/2021		4.75	198.00	940.50
	EERMC mtg, prep and debriefs; follow-up w BT/OER on PUC response to Tony's letter				
Guerard, Michael	6/18/2021		.75	198.00	148.50
	PUC follow-up coordination w BT/OER; stakeholder mtg coord				
Guerard, Michael	6/21/2021		1.50	198.00	297.00
	OER/Division/C-Team chk-in				
Guerard, Michael	6/22/2021		3.25	198.00	643.50
	OER/Grid check-in mtg; update w stakeholder and council members (PC, KT) on LCP law legislation; review website				

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Page 4

Project	7395	Rhode Island EERMC - 2021			Invoice	7197
Guerard, Michael		6/23/2021	2.75	198.00		544.50
		Source/send infor to Karen V; review legislation sub A; corrinaion call w OER on sector and EMV roles, follow-up w team				
Guerard, Michael		6/25/2021	.75	198.00		148.50
		Sent updates to PCC/AH-EERMC on LCP legislation, MF				
Johnson, Craig		6/2/2021	.25	186.00		46.50
		Council retreat debrief.				
Johnson, Craig		6/7/2021	1.50	186.00		279.00
		Council retreat debrief meeting w/ Mike and Rachel. Discussed action items and next steps.				
Johnson, Craig		6/8/2021	.25	186.00		46.50
		Discuss needs for Council meeting materials.				
Johnson, Craig		6/9/2021	.75	186.00		139.50
		Schedule meeting w/ National Grid to coordinate on plan outline memo presentations for Council meeting. Set up draft presentation deck for internal team to start adding content.				
Johnson, Craig		6/10/2021	5.75	186.00		1,069.50
		Compile and send notes on April EE TWG meeting to Rachel for memo to Council. Develop content for 2022 Plan Outline Memo presentation. Coordination with internal team. Polish and prep slides for distribution. Meeting w/ Grid team to coordinate on their presentation.				
Johnson, Craig		6/15/2021	.75	186.00		139.50
		Council meeting prep - prep talking points for residential slides. Email to Mike re: same.				
Johnson, Craig		6/16/2021	.25	186.00		46.50
		Discuss talking points for Council meeting presentation w/ Mike.				
Johnson, Craig		6/24/2021	1.00	186.00		186.00
		Attend EE TWG meeting.				
Johnson, Craig		6/30/2021	1.00	186.00		186.00
		Prep for July Council meeting. Discussion with Mike/Adrian re: C-Team Q2 activities report, assign and send out tasks.				
		Totals	58.25			11,379.75
		Total Labor				11,379.75
					Total this Phase	\$22,735.50

Phase	002	Dev of Work Products & Rep. of EERMC			
Optimal Staff					
			Hours	Rate	Amount
Belliveau, Eric		6/11/2021	1.00	212.00	212.00
		leads call - discuss current plan and sciton items, review cyclces and expected outcomes of new PI on plan.			
Belliveau, Eric		6/25/2021	1.00	212.00	212.00
		leads call on proposed plan, PI on demand, Grid changes			
Johnson, Crystal		6/23/2021	.50	198.00	99.00
		RI EERM Chairman meeting			
Ross, Samuel		6/17/2021	4.75	186.00	883.50

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Project	7395	Rhode Island EERMC - 2021	Invoice	7197
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June Council Mtg, prep re: same;

Totals

7.25

1,406.50

Total Labor

1,406.50

Total this Phase

\$5,480.50

Phase 003 EE & System Reliab. Prog. Design & Deliv

Optimal Staff

		Hours	Rate	Amount
Caesar, Adrian	6/1/2021	.25	135.00	33.75
Monthly RI Data sharing reminders and data sharing tracker update				
Caesar, Adrian	6/3/2021	3.25	135.00	438.75
C&I/Res June Sector team call prep, notetaking, and follow ups				
Caesar, Adrian	6/4/2021	1.50	135.00	202.50
Internal check-in re: NGrid 2022 plan outline memo, next steps for outline review, comments, and comps to historical data/targets, vendor cost schedule review, EW SF cost to achieve and Oil home Wx analysis				
Caesar, Adrian	6/8/2021	1.00	135.00	135.00
NGrid 2021 Plan outline memo review				
Caesar, Adrian	6/9/2021	.75	135.00	101.25
June EERMC mtg materials prep, presentation on NGrid 2022 plan outline memo,				
Caesar, Adrian	6/11/2021	4.00	135.00	540.00
Weekly RI leads strategy mtg, May Res/C&I data review and data reports, EW SF cost to achieve and measure mix analysis planning				
Caesar, Adrian	6/14/2021	.75	135.00	101.25
May Res/C&I data review and data reports				
Caesar, Adrian	6/18/2021	3.50	135.00	472.50
EnergyWise historical data and cost to achieve trend analysis				
Caesar, Adrian	6/21/2021	3.00	135.00	405.00
EnergyWise historical data and cost to achieve trend analysis, NGrid MA 2018 program and measure level CTA comps, Res deep dive/EWSF analysis discussion				
Caesar, Adrian	6/24/2021	1.50	135.00	202.50
C&I 2022 Planning deep dive prep and notetaking				
Caesar, Adrian	6/25/2021	1.00	135.00	135.00
Weekly RI leads strategy mtg				
Caesar, Adrian	6/30/2021	1.25	135.00	168.75
C-Team quarterly report to EERMC planning, Data prep for 2022 AP first draft,				
Guerard, Michael	6/1/2021	2.25	198.00	445.50
Coord/planning for June; update sub scopes; chk-in on CHP annual mtg prep; coordinate submittal of SRP comment letter by Marisa				
Guerard, Michael	6/2/2021	1.75	198.00	346.50
Prep and debriefs for C&I EMV monthly, and Annual CHP meeting				
Guerard, Michael	6/3/2021	4.00	198.00	792.00
rez and C&I montly meetings, prep and debriefs; review Grid's IE best practice meeting materials; begin review of 2022 Plan Outline Memorandum				

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Project	7395	Rhode Island EERMC - 2021			Invoice	7197
Guerard, Michael		6/4/2021	1.25	198.00		247.50
		Review/edit Cross-sector deep dive meeting draft agendas; high level review of SRP Year-end Plan submitted to PUC				
Guerard, Michael		6/7/2021	1.25	198.00		247.50
		review/edit workforce DD agenda; Review Plan Outline memorandum, coord team input				
Guerard, Michael		6/8/2021	2.25	198.00		445.50
		Continued review of Plan Outline memorandum, coord team input; updates and review of deep dive process, results, next steps with team				
Guerard, Michael		6/9/2021	2.75	198.00		544.50
		Updates with team members on next steps for plan review/processing, coord schedules, tasks				
Guerard, Michael		6/14/2021	1.25	198.00		247.50
		Cross-sector deep dive on workforce;				
Guerard, Michael		6/15/2021	2.00	198.00		396.00
		Follow-up with Grid on MF opps via RI Housing; Planning for sector oversight and next deep dive work w Adam, CJ				
Guerard, Michael		6/16/2021	2.25	198.00		445.50
		SRP TWG mtg;prep, coord for deep dive rez mtg on retrofit				
Guerard, Michael		6/22/2021	1.00	198.00		198.00
		Review/comment on Grid's draft MF stakeholder meeting summary, prep for next mtg w CJ				
Guerard, Michael		6/23/2021	3.50	198.00		693.00
		Deep dive rez mtg on retrofit, prep and debriefs; Chk-in with BT-CG/OER on coordination of EMV and sector mtgs; chk-in w Crystal on equity				
Guerard, Michael		6/24/2021	5.00	198.00		990.00
		EE TWG meeting; C&I deep dive meeting; check-in w Crystal on equity issues, jurisdictional comps; research and review BP for IE, MF				
Guerard, Michael		6/29/2021	.50	198.00		99.00
		Coord Shartners CHP review by Ecometric; preliminary review of rez BP options				
Guerard, Michael		6/30/2021	2.75	198.00		544.50
		Review team drafts of rez BP, further research conducted; mtg w Craig/Adrian to set up 1st draft data review structures and systems in advance of 7/15 release				
Jacobs, Adam		6/1/2021	1.25	186.00		232.50
		-follow-up w/ Grid on prep for June C&I sector team call -Q1 pilots and demos updates request -review RI C&I EM&V Monthly Check In Agenda for upcoming study results -note to Ecometric regarding K-12 school ventilation opportunities in prep for C&I EMV call -follow-up w/ Sam on EcoMetric sub planned hours				
Jacobs, Adam		6/2/2021	2.75	186.00		511.50
		-K-12 schools and custom baselines memo follow-ups w/ EcoMetric -follow-ups from Grid on SMB weatherization from May C&I meeting -1/2 RI C&I EM&V Monthly Check In -RI daily scrum -review RI CHP forum slides -RI CHP forum				
Jacobs, Adam		6/3/2021	1.50	186.00		279.00
		-prep for June C&I sector team call -June C&I sector team call -additional EcoMetric scope planning				

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Project	7395	Rhode Island EERMC - 2021			Invoice	7197
Jacobs, Adam		6/4/2021	1.75	186.00		325.50
Jacobs, Adam		6/7/2021	1.25	186.00		232.50
Jacobs, Adam		6/8/2021	.25	186.00		46.50
Jacobs, Adam		6/9/2021	2.00	186.00		372.00
Jacobs, Adam		6/10/2021	1.00	186.00		186.00
Jacobs, Adam		6/11/2021	1.00	186.00		186.00
Jacobs, Adam		6/14/2021	2.25	186.00		418.50
Jacobs, Adam		6/15/2021	.25	186.00		46.50
Jacobs, Adam		6/16/2021	.50	186.00		93.00
Jacobs, Adam		6/17/2021	3.25	186.00		604.50
Jacobs, Adam		6/18/2021	.25	186.00		46.50
Jacobs, Adam		6/22/2021	1.00	186.00		186.00
Jacobs, Adam		6/23/2021	.75	186.00		139.50
Jacobs, Adam		6/24/2021	1.75	186.00		325.50
Jacobs, Adam		6/25/2021	1.75	186.00		325.50

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Project	7395	Rhode Island EERMC - 2021			Invoice	7197
Jacobs, Adam		6/29/2021	.75	186.00		139.50
		-RI daily scrum -schedule call w/ EcoMetric to discuss Large CHP project review - RI Grows Exeter				
Jacobs, Adam		6/30/2021	.50	186.00		93.00
		-share full RI Growers CHP files w/ EcoMetric for technical review -RI Updates - Prep for Upcoming Council Meeting and 2022 First Draft Plan Review				
Johnson, Craig		6/1/2021	1.25	186.00		232.50
		Monthly check-in w/ Margie. E-mails w/ Adam re: timing and sequence of data sharing with Grid and Grid Q-reports. Review updates to implementation and oversight tracker. Coordinate w/ Sam/Mike on reviewing MA ISRs for VHEAs.				
Johnson, Craig		6/2/2021	2.00	186.00		372.00
		Review follow-up items from Active Demand deep dive meeting and request update. Review notes from Multifamily deep dive, compile and distribute follow-up items. Discuss follow-ups from recent deep dives and prep for upcoming sector team and deep dive meetings.				
Johnson, Craig		6/3/2021	5.75	186.00		1,069.50
		National Grid Q2 Income Eligible Best Practices meeting. Monthly Residential Sector team meeting; associated meeting prep and debrief.				
Johnson, Craig		6/4/2021	1.50	186.00		279.00
		Weekly RI Leads check-in. Discussed 2022 plan outline memo and review process, reviewed and discussed 2020 year-end report confidential vendor schedules, discussed upcoming needs for subject matter experts. Coordinate with Adam on agenda for upcoming Workforce Development deep dive meeting.				
Johnson, Craig		6/7/2021	.25	186.00		46.50
		Review draft Workforce deep dive meeting agenda. E-mails w/ Adam and Mike re: same.				
Johnson, Craig		6/8/2021	1.50	186.00		279.00
		Review updates to commitments tracker. E-mail to Laura re: the same. Discuss needs for review of Grid's plan outline memo. Review Ngrid 2022 Plan Outline Memo.				
Johnson, Craig		6/9/2021	3.75	186.00		697.50
		Review Ngrid 2022 Plan Outline memo. Discussion with internal team regarding the same. Discuss review and content needs for Council presentation. Check-in meeting w/ Ecometric team to plan for upcoming plan review activities. Update response to questions & requests and commitments tracker based on last weeks sector team meeting. Send out follow-up items from last week's sector team meeting.				
Johnson, Craig		6/11/2021	2.00	186.00		372.00
		Weekly RI Leads check-in. Review and merge team comments on 2022 Plan outline memo. Review May res data report.				
Johnson, Craig		6/14/2021	2.50	186.00		465.00
		Workforce Deep Dive meeting. Meeting prep and debrief. Review May monthly res data report. Send feedback to Adrian before sending out to stakeholders.				
Johnson, Craig		6/15/2021	1.75	186.00		325.50
		Draft agenda and prep for Res Deep Dive meeting #3 on residential retrofit programs. Review May Residential Data report.				
Johnson, Craig		6/16/2021	1.25	186.00		232.50
		Discuss resi deep dive meeting agenda. Review may residential data report and submit questions for National Grid.				
Johnson, Craig		6/21/2021	1.25	186.00		232.50

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Project	7395	Rhode Island EERMC - 2021			Invoice	7197
		Review EW cost-to-achieve comparison work w/ Adrian. Investigate increases in costs to program.				
Johnson, Craig		6/22/2021	3.50	186.00		651.00
		Prep for Res Ret Deep Dive meeting. Check-in meetings with Mike and with Margie and Richard. Prep MPS and recent program performance data for deep dive meeting.				
Johnson, Craig		6/23/2021	3.75	186.00		697.50
		2022 Planning Deep Dive Meeting - Res Retrofit Programs. Meeting prep and debrief. Morning check-in with internal team - discussed upcoming deep dive meetings and comments on multifamily stakeholder meetings summary. Finalized MF stakeholder session summary comments and distributed back to Jill G.				
Johnson, Craig		6/25/2021	1.75	186.00		325.50
		Weekly leads check-in meeting. Discussed deep dives, upcoming sector team meetings, prep for plan review. Draft and distribute July res sector team meeting agenda.				
Johnson, Craig		6/28/2021	2.00	186.00		372.00
		Review plan comment deadlines. Monthly check-in meeting w/ Margie. Compile notes and follow-up items from Res Retrofit Deep Dive meeting. Distribute to meeting participants.				
Johnson, Craig		6/29/2021	.25	186.00		46.50
		Check-in w/ internal team on upcoming sector team work and prep for 2022 first draft plan review.				
Johnson, Craig		6/30/2021	2.75	186.00		511.50
		Monthly check-in meeting w/ Richard. Prep for 2020 first draft plan input and review. Prep for Res sector team meeting. Review/respond to Glenn's question regarding RI Non-Participant Study. Prep for 2022 Plan review w/ Mike/Adrian. Discuss types of analyses we want to complete. Send assignments to Sam/Adam re: the same.				
Ross, Samuel		6/1/2021	1.75	186.00		325.50
		App Recycling comments finalized; correspondence preparing for Wed EMV call				
Ross, Samuel		6/2/2021	2.75	186.00		511.50
		team check in; C&I EMV call, prep & follow up re: same; Solar study next steps; scheduling cross-sector EMV call				
Ross, Samuel		6/3/2021	.50	186.00		93.00
		monthly EMV internal check in				
Ross, Samuel		6/4/2021	1.00	186.00		186.00
		Leads check in				
Ross, Samuel		6/7/2021	1.00	186.00		186.00
		initial skim of Grid EE 2022 plan outline memorandum				
Ross, Samuel		6/8/2021	3.00	186.00		558.00
		EM&V follow ups - solar inverter, gas pk dmd, part study next steps, SRP PUC hearing, internal team coord re: Council materials due Friday				
Ross, Samuel		6/9/2021	4.00	186.00		744.00
		initial review of EE Plan Outline Memorandum, discussion & comments re: same; 2022 plan dev resource allocation mtg				
Ross, Samuel		6/10/2021	4.00	186.00		744.00
		Council materials prep, review, mtg. re: same				
Ross, Samuel		6/11/2021	2.00	186.00		372.00
		Leads Call, prep for next wk council mtg; Gas Pk Dmd comments				
Ross, Samuel		6/14/2021	1.50	186.00		279.00

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Project	7395	Rhode Island EERMC - 2021	Invoice	7197
		EMV correspondence re: NonPart mtg, solar PFC presentation, listening to same		
Ross, Samuel		6/16/2021 3.75 186.00	697.50	
		Council meeting disc re key talking points; prep for cross sector EMV call; SRP TWG, soloar inverter study comment consolidation		
Ross, Samuel		6/17/2021 .50 186.00	93.00	
		cross sector EM&V mtg agenda dev		
Ross, Samuel		6/21/2021 1.50 186.00	279.00	
		C-Team Check In w/OER and others; comments on Gas DR slides from Ezra		
Ross, Samuel		6/22/2021 1.75 186.00	325.50	
		NWA call; EMV materials follow up		
Ross, Samuel		6/23/2021 1.50 186.00	279.00	
		EMV Combined sector call, prep & follow-up re: same		
Ross, Samuel		6/25/2021 1.00 186.00	186.00	
		Leads check in		
Ross, Samuel		6/28/2021 2.50 186.00	465.00	
		Solar PFC detail meeting, prep and follow-up re: same. EM&V correspondence, poll distribution, leg study & 2022 plan initial review		
Ross, Samuel		6/30/2021 5.25 186.00	976.50	
		Non Part Study meeting, prep and follow-up re: same; SRP corresp re: NWA, CA total lifetime benefits, EM&V dox to review next wk, staffing plan for OER streamlined EMV engagement		
		Totals 159.25	28,916.25	
		Total Labor		28,916.25
			Total this Phase	\$31,834.75

Phase	004	Adv Integ Approaches & Emerging Issues		
Optimal Staff				
			Hours	Rate
				Amount
Guerard, Michael		6/28/2021 1.00 198.00	198.00	
		Coord. team response to Gas DR PIM scheduling; chk-in on LCP law extension status		
Guerard, Michael		6/29/2021 .75 198.00	148.50	
		Source/send data and info to CK/OER regarding LCP law draft extension		
Guerard, Michael		6/30/2021 .75 198.00	148.50	
		Monitor GA discussion/vote on LCP law extension		
Johnson, Craig		6/29/2021 .50 186.00	93.00	
		Compile average res usage and renter participation bullet points for Chris Kearns.		
		Totals 3.00	588.00	
		Total Labor		588.00
			Total this Phase	\$588.00
			Total this Project	\$60,638.75
			Total this Report	\$60,638.75

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EcoMetric Consulting, LLC
555 Exton Cms
Exton, PA 19341
610.400.8600
admin@ecometricconsulting.com

INVOICE

BILLED TO

Mike Guerard
Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

TOTAL DUE

\$9,007.00

Project Name RI EEMRC Consultant
Project # 7395
Invoice # 1029-P6-21
Billing Period 05/29/2021 - 07/02/2021

Invoice Date 06/30/2021
Due Date 07/30/2021
Payment Terms Net 30

Task Number	Description	Amount
Task 1	EM&V Oversight	\$5,398.00
Task 2	Program Design & Policy	\$3,609.00

Subtotal	\$9,007.00
Invoice Total	\$9,007.00

Invoice Number 1029-P6-21
Period 05/29/2021 - 07/02/2021

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	EM&V Oversight	Salil Gogte	Partner	2021-06	1.5	\$ 212.00	\$ 318.00
RI EEMRC Consultant	EM&V Oversight	Michael Frischmann	Partner	2021-06	0	\$ 212.00	\$ -
RI EEMRC Consultant	EM&V Oversight	Michael Honeychuck	Managing Consultant	2021-06	20	\$ 198.00	\$ 3,960.00
RI EEMRC Consultant	EM&V Oversight	Bitul Sinha	Sr Engineer	2021-06	7	\$ 160.00	\$ 1,120.00
RI EEMRC Consultant	EM&V Oversight	Divya Prasanna	Project Coordinator	2021-06	0	\$ -	\$ -
Total					28.5		\$ 5,398.00

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	Program Design & Policy	Salil Gogte	Partner	2021-06	1	\$ 212.00	\$ 212.00
RI EEMRC Consultant	Program Design & Policy	Michael Frischmann	Partner	2021-06	0	\$ 212.00	\$ -
RI EEMRC Consultant	Program Design & Policy	Michael Honeychuck	Managing Consultant	2021-06	11.5	\$ 198.00	\$ 2,277.00
RI EEMRC Consultant	Program Design & Policy	Bitul Sinha	Sr Engineer	2021-06	7	\$ 160.00	\$ 1,120.00
RI EEMRC Consultant	Program Design & Policy	Divya Prasanna	Project Coordinator	2021-06	0	\$ -	\$ -
Total					19.5		\$ 3,609.00

Name	Task	Michael	Frischmann	local_date	hours	task	notes
Salil Gogte	EM&V Oversight	Salil	Gogte	6/9/2021	1.5	EM&V Oversight	discuss planning work, follow up with the team
Salil Gogte	Program Design & F	Salil	Gogte	6/28/2021	1	Program Design & Policy	call re CHP case study
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	5/31/2021	0.5	EM&V Oversight	Emails Appliance recycling memo review Emails with Sam & Adam
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	6/1/2021	3	EM&V Oversight	Weekly check-in
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	6/2/2021	2	EM&V Oversight	Emails with C-Team & Adam
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	6/3/2021	1.5	EM&V Oversight	Emails, planning, scheduling Review invoices & budget
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	6/7/2021	2	EM&V Oversight	Discussions with Divya & Bitul Planning call with Optimal
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	6/9/2021	3	EM&V Oversight	Updated solar inverter study review Updated solar inverter study review
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	6/10/2021	2	EM&V Oversight	Emails
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	6/15/2021	0.5	EM&V Oversight	Emails Review documents for RCx call
Michael Honeychuck	Program Design & F	Michael	Honeychuck	6/16/2021	1.5	Program Design & Policy	Emails
Michael Honeychuck	Program Design & F	Michael	Honeychuck	6/17/2021	2	Program Design & Policy	Review documents for RCx call
Michael Honeychuck	Program Design & F	Michael	Honeychuck	6/21/2021	1	Program Design & Policy	Prep for RCx deep dive call Prep for RCx deep dive call
Michael Honeychuck	Program Design & F	Michael	Honeychuck	6/22/2021	2	Program Design & Policy	Call with Adam
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	6/23/2021	1	EM&V Oversight	Monthly EM&V call (res and C&I combined)
Michael Honeychuck	Program Design & F	Michael	Honeychuck	6/24/2021	1	Program Design & Policy	RCx deep dive call Review final solar inverter study Emails
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	6/25/2021	1	EM&V Oversight	Planning Solar inverter call Review CHP files
Michael Honeychuck	Program Design & F	Michael	Honeychuck	6/28/2021	3	Program Design & Policy	Internal CHP discussion & planning
Michael Honeychuck	Program Design & F	Michael	Honeychuck	6/29/2021	1	Program Design & Policy	Review CHP files
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	6/30/2021	1	EM&V Oversight	Call with Illume about non-participant study Monthly check-in Planning
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	7/1/2021	1	EM&V Oversight	Emails Non-participant interview guide review
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	7/2/2021	1.5	EM&V Oversight	Emails
Bitul Sinha	EM&V Oversight	Bitul	Sinha	6/3/2021	3	EM&V Oversight	Recycle appliance memo
Bitul Sinha	EM&V Oversight	Bitul	Sinha	6/8/2021	2	EM&V Oversight	Solar PV Inverter memo readthrough
Bitul Sinha	EM&V Oversight	Bitul	Sinha	6/9/2021	2	EM&V Oversight	Optimal Check-in + Prep
Bitul Sinha	Program Design & F	Bitul	Sinha	6/25/2021	3	Program Design & Policy	RI CHP Project Readthrough
Bitul Sinha	Program Design & F	Bitul	Sinha	6/29/2021	4	Program Design & Policy	Exeter CHP Project Report + Discussion

Energy Futures Group, Inc.
PO Box 587
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 4691
Invoice Date: June 30, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services	Amount		
Services Performed 6/1/2021 through 6/30/2021			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	6.75	\$198.00	\$1,336.50
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$1,336.50</u>

Date	Description of Services	001 - EERMC Oversight	002 - Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
6/14/2021	Discuss scheduling with Ben; review survey responses			0.25			0.25	0.00	0.25
6/16/2021	Scheduling meetings			0.25			0.25	0.00	0.25
6/18/2021	Review quarterly report and send comments to Adam			1.00			1.00	0.00	1.00
6/22/2021	Prep for prep meeting with Craig Johnson and Margie for EnergyWise discussion with Ngrid.			1.25			1.25	0.00	1.25
6/23/2021	EnergyWise planning discussion with Ngrid and others.			1.00			1.00	0.00	1.00
6/29/2021	Provide follow-up requests to Optimal on equity and EnergyWise			0.50			0.50	0.00	0.50
6/30/2021	Review of Plan review call notes, call w/R. Faesy			0.25			0.25	0.00	0.25
6/30/2021	Participate in RI Nonparticipant study interview with Illume			1.00			1.00	0.00	1.00
6/30/2021	Check in with Mike Guerard and Craig Johnson re. 2021 planning, followup notes with Glenn and Dan			1.25			1.25	0.00	1.25
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	6.75	0.00	0.00	6.75	0.00	6.75
	Total Amount	\$0.00	\$0.00	\$1,336.50	\$0.00	\$0.00	\$1,336.50	0.00	\$1,336.50

Pay to: Jennifer Chiodo
JLC Consulting, LLC
52 Bent Creek Road
Hinesburg, VT 05460

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-2021.03*
Invoice Date: *June 30, 2021*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 6/1/2021 through 6/30/2021			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	5.25	\$198.00	\$1,039.50
LABOR - Travel Hours	0.00	\$99.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$1,039.50</u>

Pay to Jennifer Ciodo
Services Performed 6/1/2021 through 6/30/2021

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning & Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
6/16/21	RI data review through May			1.50			1.50	0.00	1.50
6/17/2021	RCx and ESPO review, team prep for deep dive			1.25			1.25	0.00	1.25
6/24/2021	Prep for deep dive HVAC call, call and follow ups			2.50			2.50	0.00	2.50
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	5.25	0.00	0.00	5.25	0.00	5.25
	Total Amount	\$0.00	\$0.00	\$1,031.50	\$0.00	\$0.00	\$1,031.50	0.00	\$1,031.50

Margie Lynch/Core Energy Insights, Inc.
4445 E. Hoback River Road, Jackson, WY 83001

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 6-2021*
Invoice Date: *June 30, 2021*
OEI Project #: *7395*

Work Performed for National Grid USA Service Company

Description of Services	Amount
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Services Performed 06/01/2021 through 06/30/2021

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	2.50	\$186.00	\$465.00

TOTAL DUE

\$465.00

Margie Lync Core Energy Insights, Inc.
Services Performed 06/01/2021 through 06/30/2021

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
6/1/21	Check in w/C. Johnson		0.50				0.50	0.00	0.50
6/22/2021	Prepared for EnergyWise SF deep dive meeting		0.75				0.75	0.00	0.75
6/23/2021	Participated in EnergyWise SF deep dive meeting		1.00				1.00	0.00	1.00
6/28/2021	Check in w/C. Johnson		0.25				0.25	0.00	0.25
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	2.50	0.00	0.00	0.00	2.50	0.00	2.50
	Total Amount	\$0.00	\$65.00	\$0.00	\$0.00	\$0.00	\$65.00	0.00	\$65.00

Ralph Prah
7001 Stanhope Place, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 21
Invoice Date: July 2, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount
Services Performed 05/01/21 through 06/30/21		
	<u>Hours</u>	<u>Hourly Rate</u>
LABOR - Regular Hours	20.50	\$198.00
LABOR - Travel Hours	0.00	\$99.00
Travel Expenses (See attached travel expense form for details.)		\$0.00
TOTAL DUE		<u>\$4,059.00</u>

Ralp Pra

Services performed 5/01/21 through 6/30/21

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
5/3/2021	jobs report; P and NP studies; prep for C&I studies call; solar inverter workplan	2.00				2.00	0.00	2.00
5/4/2021	solar inverter workplan; C&I ltg controls savings issue from Ben; C&I custom gas res plan; res peak gas demand report	1.25				1.25	0.00	1.25
5-May	C&I studies check-in call; C&I upstrm ltg controls issue; Res peak gas demand report	1.75				1.75	0.00	1.75
5/6/2021	C&I custom gas workplan	1.25				1.25	0.00	1.25
5/7/2021	custom gas impact workplan	0.50				0.50	0.00	0.50
5/12/2021	res peak gas report	0.50				0.50	0.00	0.50
5/13/2021	peak gas demand report; PV inverter study	0.75				0.75	0.00	0.75
5/19/2021	2022 plan; C&I custom gas study	0.50				0.50	0.00	0.50
5/21/2021	application of MA impact results to RI 2022 planning; ARP study	1.25				1.25	0.00	1.25
5/24/2021	conf calls on appl of MA results	1.25				1.25	0.00	1.25
5/26/2021	res check-in call; 2022 plan assumptions	1.50				1.50	0.00	1.50
5/27/2021	2022 savings assumptions (res heating for Craig); P/NP studies	0.75				0.75	0.00	0.75
6/1/2021	ARP study	0.25				0.25	0.00	0.25
6/2/2021	C&I studies call; ex-ante review process; custom gas impact res plan	1.50				1.50	0.00	1.50
6/6/2021	res gas peak demand report	0.25				0.25	0.00	0.25
6/10/2021	solar inverter res plan rev; NP study	1.00				1.00	0.00	1.00
6/17/2021	ltg controls study, upstrm ltg report, ltg controls memo	0.50				0.50	0.00	0.50
6/18/2021	C&I upstrm ltg gross impact eval report	0.50				0.50	0.00	0.50
6/20/2021	upstrm ltg imp rep	0.25				0.25	0.00	0.25
6/23/2021	check-in call + prep	1.00				1.00	0.00	1.00
6/29/2021	appl of MA impact results; leg study recs follow-up from Grid; C&I lighting market model res plan	1.00				1.00	0.00	1.00
6/30/2021	NP study conf call	1.00				1.00	0.00	1.00
						0.00	0.00	0.00
						0.00	0.00	0.00
	Total hours	20.50	0.00	0.00	0.00	20.50	0.00	20.50
	Total Amount	\$4,059.00	\$0.00	\$0.00	\$0.00	\$4,059.00	0.00	\$4,059.00

Rachel Sholly Energy Consulting
48 Hudson St. Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 42
Invoice Date: June 30, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 06/01/21 through 06/30/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	15.75	\$155.00	\$2,441.25
LABOR - Travel Hours	0.00	\$77.50	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$2,441.25</u>

Raciel Solly Energy Consulting
Services Performed 06/01/21 through 06/30/21

Date	Description of Services	001 - EERMC Oversight	002 - Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
06/01/21	CHP mtg prep - talking points for Tom, final meeting reminders; Posted EM&V one-pager & updated ExComm agenda	0.25		0.50			0.75	0.00	0.75
06/02/21	Retreat debrief & CHP prep w/Mike; CHP Annual Meeting & prep	0.25		2.50			2.75	0.00	2.75
06/03/21	Optimal weekly scrum	0.50					0.50	0.00	0.50
06/07/21	Retreat follow-up - recording & notes; Retreat follow-up w/Mike & Craig; Sent out CHP slides	3.50		0.50			4.00	0.00	4.00
06/08/21	Rewatched retreat PUC presentation & drafted retreat thank you letter	1.25					1.25	0.00	1.25
06/09/21	Drafted CHP memo	1.00					1.00	0.00	1.00
06/10/21	Optimal weekly scrum & follow-up w/Mike; TWG memo; Meeting materials review; Posted mtg materials; Reviewed C-team budget proposal	3.00					3.00	0.00	3.00
06/11/21	RI leads mtg	1.00					1.00	0.00	1.00
06/15/21	Upload meeting materials and EM&V study	0.50					0.50	0.00	0.50
06/17/21	Optimal weekly scrum	0.50					0.50	0.00	0.50
06/30/21	Optimal weekly scrum	0.50					0.50	0.00	0.50
	Total hours	12.25	0.00	3.50	0.00	0.00	15.75	0.00	15.75
	Total Amount	\$1,000.75	\$0.00	\$502.50	\$0.00	\$0.00	\$2,001.25	0.00	\$2,001.25

Invoice



July 31, 2021
Project No: 7395
Invoice No: 7217

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2021

Professional Services from July 1, 2021 to July 31, 2021

Phase	001	EERMC Oversight	-----		
Optimal Staff					
			Hours	Rate	Amount
		Caesar, Adrian	3.75	135.00	506.25
		Guerard, Michael	33.00	198.00	6,534.00
		Johnson, Craig	17.75	186.00	3,301.50
		Totals	54.50		10,341.75
		Total Labor			10,341.75
Subcontractors					
		Rachel Sholly			2,131.25
		EcoMetric Consulting, LLC			5,896.00
		Total Subcontractors			8,027.25
					8,027.25
				Total this Phase	\$18,369.00

Phase	002	Dev of Work Products & Rep. of EERMC	-----		
Optimal Staff					
			Hours	Rate	Amount
		Belliveau, Eric	2.00	212.00	424.00
		Guerard, Michael	1.00	198.00	198.00
		Ross, Samuel	17.25	186.00	3,208.50
		Totals	20.25		3,830.50
		Total Labor			3,830.50

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021	Invoice	7217
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Subcontractors

Core Energy Insights Inc.	744.00		
Total Subcontractors	744.00	744.00	
Total this Phase			\$4,574.50

Phase	003	EE & System Reliab. Prog. Design & Deliv
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Optimal Staff

	Hours	Rate	Amount
Caesar, Adrian	48.75	135.00	6,581.25
Guerard, Michael	39.50	198.00	7,821.00
Jacobs, Adam	34.50	186.00	6,417.00
Johnson, Craig	60.00	186.00	11,160.00
Ross, Samuel	46.25	186.00	8,602.50
Totals	229.00		40,581.75
Total Labor			40,581.75

Subcontractors

Jennifer Chiodo		1,732.50	
Energy Futures Group, Inc.		8,068.50	
Total Subcontractors		9,801.00	9,801.00
Total this Phase			\$50,382.75

Phase	004	Adv Integ Approaches & Emerging Issues
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Optimal Staff

	Hours	Rate	Amount
Guerard, Michael	4.00	198.00	792.00
Totals	4.00		792.00
Total Labor			792.00
Total this Phase			\$792.00

Billing Limits

	Current	Prior	To-Date
Total Billings	74,118.25	341,207.75	415,326.00
Limit			631,263.00
Remaining			215,937.00
Total this Invoice			\$74,118.25

Billings to Date

	Current	Prior	Total
Labor	55,546.00	261,476.00	317,022.00
Subcontractor	18,572.25	79,731.75	98,304.00
Totals	74,118.25	341,207.75	415,326.00

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021	Invoice	7217
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Project 7395 Rhode Island EERMC - 2021 Invoice 7217

Billing Backup

Tuesday, August 17, 2021

Optimal Energy Inc.

Invoice 7217 Dated 7/31/2021

4:46:17 PM

Phase 001 EERMC Oversight

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian	7/14/2021		.50	135.00	67.50
		New EERMC member onboarding			
Caesar, Adrian	7/29/2021		3.25	135.00	438.75
		July EERMC Meeting prep and C-Team internal notetaking			
Guerard, Michael	7/1/2021		1.25	198.00	247.50
		Review OER filing on Docket 5080 BC model; send legislation update to Case/Teichert			
Guerard, Michael	7/6/2021		2.75	198.00	544.50
		Check-in w OER tech sessions and oversight of marketing vendors; Coord calls w stakeholders ahead of 1st draft of EE Plan; team review of tech session topics			
Guerard, Michael	7/7/2021		3.75	198.00	742.50
		Call w Grid and OER on Tech session options and BC model analysis on PIM, prep; Eudc wrking grp call; EERMC retreat follow-task review w Rachel, CJ			
Guerard, Michael	7/8/2021		2.75	198.00	544.50
		Reach out to Sue A to set up council orientation mtg, coord with rachel on team scheduling and general prep materials; Final review of proposed list of PUC tech session topics to disctribut to Grid/OER			
Guerard, Michael	7/9/2021		1.25	198.00	247.50
		Call w enviro stakeholders (Kai/Hank) to prep for 1st draft of 2022 plan, debrief on legislation; Check-in w Leads;			
Guerard, Michael	7/13/2021		.50	198.00	99.00
		Prep for council orientation mtg w Sue A.			
Guerard, Michael	7/14/2021		3.75	198.00	742.50
		Orientation meeting with Sue and team, prep and debriefs; review/comment on EERMC agenda for BT/OER; review jurisdictional comps on council input on Plans, "resolutions"; chk-in MA 3YP plan status as it relates to RI options; coordinate w Matt/Grid on E-W overspend review			
Guerard, Michael	7/15/2021		3.25	198.00	643.50
		Call w M.Chase/Grid and Sam on SRP memo; Follow-up w Harrington/PUC on tech sessions; EERMC mtg material prep; chk-in w M.Ray/Grid			
Guerard, Michael	7/16/2021		1.25	198.00	247.50
		EERMC mtg prep, agenda review; respond to legislation query from P. Case			
Guerard, Michael	7/19/2021		4.00	198.00	792.00
		Call w J.Harrington/PUC on tech sessions, follow-up debriefs w team; EERMC mtg material prep; debrief w team on OER/Div chk-in			
Guerard, Michael	7/20/2021		2.00	198.00	396.00
		EERMC mtg material development			
Guerard, Michael	7/23/2021		3.00	198.00	594.00
		Review final EERMC presentation materials on Plan; Coord. and support prep for SRP tech session;			

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Page 4

Project	7395	Rhode Island EERMC - 2021			Invoice	7217
Guerard, Michael		7/29/2021	2.25	198.00		445.50
		Chk-in w BT/OER on PUC tech session; support EERMC mtg prep				
Guerard, Michael		7/30/2021	1.25	198.00		247.50
		Check-in with OER; debrief on EERMC mtg w team				
Johnson, Craig		7/1/2021	.25	186.00		46.50
		Review assignments with Rachel and Sam for developing C-Team Q2 report to Council.				
Johnson, Craig		7/7/2021	.50	186.00		93.00
		C-Team Q2 Report to Council - review Adam and Adrian's additions to content.				
Johnson, Craig		7/12/2021	.25	186.00		46.50
		Check-in on progress of team filling int Q2 activities for update memo to Council.				
Johnson, Craig		7/14/2021	1.00	186.00		186.00
		Onboarding meeting with Councilor AnderBois, associated meeting prep.				
Johnson, Craig		7/16/2021	.75	186.00		139.50
		Prep C-Team Q2 activities report memo.				
Johnson, Craig		7/20/2021	1.25	186.00		232.50
		Check-in with internal team on review of 2022 first draft of annual plan. Develop draft slide deck and outline for C-Team's plan presentation.				
Johnson, Craig		7/21/2021	1.00	186.00		186.00
		Draft content for Q2 C-Team Activities memo. Draft Recommendation memo to Council on Grid overspend.				
Johnson, Craig		7/22/2021	3.00	186.00		558.00
		Draft memo to council on potential budget overspend - including review of Ngrid's presentation and language in 2021 plan re: notification requirements. Check-in w/ Mike and Sam on all deliverable for Council meeting. Check-in w/ Sam, Adrian, and Adam on development of first draft plan review presentation. Develop slide content for residential sector. Finalize meeting materials for Council meeting - including Overspend memo, Q2 activities report, and TWG meeting update.				
Johnson, Craig		7/23/2021	2.25	186.00		418.50
		Working session with Sam, Mike, Adam, and Adrian to finish slide content for 2022 First Draft Plan Review. Final review of draft presentation on 2022 draft plan review.				
Johnson, Craig		7/28/2021	3.50	186.00		651.00
		Review and prep for Council presentation on first draft of 2022 plan with Sam. Review Adam talking points for C&I, Active Demand, and Workforce Dev slides. Prep talking points for Council presentation.				
Johnson, Craig		7/29/2021	4.00	186.00		744.00
		Council Meeting. Council meeting prep, including discussions with Sam and Adam, prepping and rehearsing narrative.				
		Totals	54.50			10,341.75
		Total Labor				10,341.75
					Total this Phase	\$18,369.00

Phase 002 Dev of Work Products & Rep. of EERMC

Project	7395	Rhode Island EERMC - 2021	Invoice	7217
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Optimal Staff

		Hours	Rate	Amount	
Belliveau, Eric	7/9/2021	1.00	212.00	212.00	
	leads call - MW incentive, Grid plan discussion, EMV path				
Belliveau, Eric	7/16/2021	1.00	212.00	212.00	
	disc with team				
Guerard, Michael	7/1/2021	.50	198.00	99.00	
	Education subgroup prep w RS				
Guerard, Michael	7/26/2021	.50	198.00	99.00	
	Review and provide prelim answers to Sue AnderBois set of PEE Plan Q's, coord with team to fill out all answers				
Ross, Samuel	7/21/2021	5.25	186.00	976.50	
	SRP YTD update memo rough draft developed and shared; begin review of 1st draft plan attachments; disc. of review assignments and key next steps, incl. outlining 1st draft comments presentation and key comments				
Ross, Samuel	7/22/2021	8.00	186.00	1,488.00	
	1st draft EE Plan review: finish pass through my attachment assignments, detailed read through main text & mapping to Council Priorities, Memorandum feedback; drafting 1st draft slides for Council mtg; finalize SRP memo, Q2 report, TWG summary slides; submit same.				
Ross, Samuel	7/23/2021	4.00	186.00	744.00	
	finish full draft, discuss same; merge, polish, trim QA and submit final draft deck covering 1st draft 2022 EE Plan				
	Totals	20.25		3,830.50	
	Total Labor				3,830.50
			Total this Phase		\$4,574.50

Phase 003 EE & System Reliab. Prog. Design & Deliv

Optimal Staff

		Hours	Rate	Amount	
Caesar, Adrian	7/1/2021	4.00	135.00	540.00	
	Internal check-in re: modified LCP updates, July council mtg and 2022 AP first draft prep, C&I and Res monthly sector team call prep, notetaking, and follow ups, monthly RI data reminders, Q2 C-Team report development				
Caesar, Adrian	7/5/2021	2.50	135.00	337.50	
	2022 AP first draft analysis prep - BC MPS mapping tool updates for 2020 actuals and 2022 BC models				
Caesar, Adrian	7/6/2021	2.25	135.00	303.75	
	2022 AP first draft analysis prep - BC MPS mapping tool updates for 2020 actuals and 2022 BC models				
Caesar, Adrian	7/13/2021	2.75	135.00	371.25	
	2022 AP first draft analysis prep - BC MPS mapping tool updates for 2020 actuals and 2022 BC models, Program-level comps template workbook				
Caesar, Adrian	7/14/2021	3.50	135.00	472.50	
	2022 AP first draft analysis prep - 2022 BC models, Program-level comps template workbook, Custom C&I planned value comps analysis				

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7217
Caesar, Adrian		7/15/2021	.50	135.00		67.50
		2022 Planning prep - MPS mapping tool updates for PUC compliance filing and original filing 2021-2023 BC models, ConnectedSolutions data prep				
Caesar, Adrian		7/16/2021	4.00	135.00		540.00
		Weekly RI leads check-in, 2022 Plan first draft processing meeting, 2022 Annual Plan BC model analysis, EW SF cost to achieve analysis, Custom C&I trend analysis				
Caesar, Adrian		7/19/2021	5.25	135.00		708.75
		Preliminary C&I/Res Q2 data reporting and analysis, ConnectedSolutions program performance analysis, July EERMC presentation prep - 2022 Annual plan first draft				
Caesar, Adrian		7/20/2021	1.00	135.00		135.00
		2022 AP 1st draft presentation planning				
Caesar, Adrian		7/21/2021	4.50	135.00		607.50
		2022 AP 1st draft presentation planning, Custom C&I plan and actual data analysis, BC MPS mapping tool updates - end use and measure ID remappings				
Caesar, Adrian		7/22/2021	4.00	135.00		540.00
		EERMC July mtg materials prep, 2022 Plan data comps to historical actuals and plans and targets, 2022 first draft AP presentation development				
Caesar, Adrian		7/23/2021	4.00	135.00		540.00
		RI 2022 Annual plan analysis and presentation development, check-in re: 2022 AP 1st draft slides				
Caesar, Adrian		7/26/2021	2.00	135.00		270.00
		2022 Annual plan first draft review and July EERMC meeting prep discussion, 2022 AP first draft attachments and BC model review/comments				
Caesar, Adrian		7/27/2021	1.00	135.00		135.00
		2022 Annual plan first draft review and July EERMC meeting prep discussion, 2022 AP first draft attachments and BC model review/comments				
Caesar, Adrian		7/28/2021	3.00	135.00		405.00
		July EERMC mtg and 2022 first draft plan analysis discussion, July data report QA/data checks, 2022 plan BC model and plan analysis/comments				
Caesar, Adrian		7/29/2021	2.50	135.00		337.50
		July EERMC mtg prep, 2022 plan comments consolidation, RI test attachment review				
Caesar, Adrian		7/30/2021	2.00	135.00		270.00
		2022 AP review, RI cost test, EM&V/Res/C&I attachments, Electric and Gas BC model review, CHP project discussion, C-Team 2022 first draft plan comments compilation				
Guerard, Michael		7/1/2021	3.75	198.00		742.50
		Follow-up on Outline Memo with Grid to request additional analysis; review/comment on non-part EMV study; review data from Angela on DI; review team input on deep dive follow-ups ahead of 1st draft				
Guerard, Michael		7/6/2021	1.25	198.00		247.50
		Finalize timeline and deliverables for JULY for team members				
Guerard, Michael		7/7/2021	1.00	198.00		198.00
		Review of Exeter CHP project w Adam and EcoMetric				
Guerard, Michael		7/9/2021	3.25	198.00		643.50
		Team prep for 1st draft of Plan; follow-up on RFP/SOW, note to OER; coord review of Upstream lighting EMV review; send update on C&I RFP/SOW status to BT-NC/OER				
Guerard, Michael		7/12/2021	1.75	198.00		346.50

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Project	7395	Rhode Island EERMC - 2021			Invoice	7217
		Work w Leads to set up review process for full team, timelines and deliverables				
Guerard, Michael		7/13/2021	1.75	198.00		346.50
		Review/comment on EMV study drafts; best practice review of equity implementation solutions				
Guerard, Michael		7/15/2021	.25	198.00		49.50
		Review Division's IRs on CHP project				
Guerard, Michael		7/16/2021	6.25	198.00		1,237.50
		Prelimin review of EE Plan draft issued by Grid, coord team review, BC model analysis set up; debriefs on EMV calls on MA study application				
Guerard, Michael		7/21/2021	3.50	198.00		693.00
		Discussion on E-Wise overspend, draft memo for EERMC; review EE PLan draft				
Guerard, Michael		7/22/2021	2.00	198.00		396.00
		final review of SOW/RFPs; review EE Plan				
Guerard, Michael		7/26/2021	4.50	198.00		891.00
		Review SOWs/RFPs and comment; review of 1st draft of Plan				
Guerard, Michael		7/27/2021	3.00	198.00		594.00
		EE PLan review				
Guerard, Michael		7/29/2021	1.75	198.00		346.50
		1st draft Plan review, comments				
Guerard, Michael		7/30/2021	5.50	198.00		1,089.00
		RI EE Plan review, comments; coord w team; review stakeholder comments				
Jacobs, Adam		7/1/2021	1.25	186.00		232.50
		-prep for monthly C&I sector team call -RI Monthly C&I sector team call				
Jacobs, Adam		7/6/2021	.75	186.00		139.50
		-1/2 RI daily scrum -updated EFG subcontractor work-order for Q3 -consultant Q2 report C&I sections				
Jacobs, Adam		7/7/2021	1.75	186.00		325.50
		-RI Daily scrum -prep for RI Growers CHP call w/ Ecometric -CHP NTG study source -Large CHP project review - RI Grows Exeter				
Jacobs, Adam		7/8/2021	.75	186.00		139.50
		-final Upstream Lighting study review and comment				
Jacobs, Adam		7/9/2021	1.00	186.00		186.00
		-RI leads check-in call				
Jacobs, Adam		7/12/2021	.50	186.00		93.00
		-new councilor onboarding prep work -notify subs of upcoming plan review tasks				
Jacobs, Adam		7/14/2021	1.00	186.00		186.00
		-monthly check-in w/ subcontractors on C&I implementation and planning tasks -new councilor orientation/onboarding -briefly touch base on draft plan w/ NGrid C&I staff				
Jacobs, Adam		7/15/2021	1.00	186.00		186.00
		-informal catch-up on draft plan w/ Grid C&I sector team lead				
Jacobs, Adam		7/19/2021	3.75	186.00		697.50

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Project	7395	Rhode Island EERMC - 2021		Invoice	7217
		<ul style="list-style-type: none"> -review DPUC data requests for RI Growers CHP project -follow-up w/ Dan on C&I data report questions -check-in w/ Craig on sector team meetings and review tasks -initial review of 2022 Draft BC model MPS mapping tools -review and comment on NGrid industrial initiative draft SOW -review June C&I data report and enter questions into committment tracker -August sector team meeting rescheduling -review Connected Solutions data -review and comment on NGrid Grocer initiative draft SOW 			
Jacobs, Adam		7/20/2021	1.25	186.00	232.50
		<ul style="list-style-type: none"> -RI full team scrum -internal coordination on draft plan presentation -finish review/comment on grocer initiative SOW -start review of Attachment 2 C&I section of draft plan 			
Jacobs, Adam		7/21/2021	5.25	186.00	976.50
		<ul style="list-style-type: none"> -2022 draft plan BC/MPS mapping data review -draft slides for July EERMC presentation -check-in w/ Adrian on custom C&I analysis -full review and comment on draft plan Attachment 2 -flag ADM BCR issues and share w/ Grid 			
Jacobs, Adam		7/22/2021	1.25	186.00	232.50
		<ul style="list-style-type: none"> -review subcontractor high-level feedback on C&I draft plan -internal check-in on July EERMC meeting slides -draft SOW review comment follow-ups -C&I gas slides on 2022 annual plan for EERMC ppt -assemble feedback from OER on draft SOWs -combine sub feedback on attachment 2 			
Jacobs, Adam		7/23/2021	3.25	186.00	604.50
		<ul style="list-style-type: none"> -review SEM gas savings in plan -review and combine comments from subs and OERs on draft SOWs -send NGrid industrial initiative RFP SOW comments -RI leads check-in call/group review of draft slides -review pilots and demos section of draft 2022 plan -follow-up on customer feedback activities 			
Jacobs, Adam		7/26/2021	2.50	186.00	465.00
		<ul style="list-style-type: none"> -notes to Jen on ASHRAE guideline 36 trainings in 3YP main text workforce section -review/consildate C-team/OER feedback on Grocer Initiative SOW for Grid -RI check-in (Plan review next steps; Council Prep) -review/comment on C&I and workforce sections of draft plan main text -internal follow-up on CHP RI Growers project 			
Jacobs, Adam		7/27/2021	3.00	186.00	558.00
		<ul style="list-style-type: none"> -RI daily scrum -check-in on EERMC materials -draft plan review internal coordination -respond to questions from Sue Ander Bois -review/comment on NGrid draft 2022 BCR models 			
Jacobs, Adam		7/28/2021	3.00	186.00	558.00
		<ul style="list-style-type: none"> -RI daily scrum/check-in on plan review tasks -C&I new construction baseline issues follow-ups/next steps w/ Sam -finish answering councilor questions on draft plan -C&I talking points for July EERMC presentation -data related questions on NGrid C&I gas BCR models -ADM talking points for C&I presentation 			

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Project	7395	Rhode Island EERMC - 2021			Invoice	7217
Jacobs, Adam		7/29/2021	.75	186.00		139.50
		-RI EM&V: NC Programs & MA NC NTG Results (poll + note to meeting group RE: C-team availability) -follow-up w/ Craig on finalizing draft plan comments -consolidate Attachment 2 comments				
Jacobs, Adam		7/30/2021	2.50	186.00		465.00
		-follow-up w/ Jen on covering NC Programs & MA NC NTG Results call w/ Grid -August council meeting debrief -check-in notes w/ Josh from Grid on draft plan comments, commitment track Q&A and council meeting follow-ups -analyst check-in on large CHP spending applied to other savings potential -review Grid responses to Division data requests for Docket 5076 - RI Grows CHP -draft and send August C&I sector team meeting agenda -review NEEP Strategic Energy Management Case Study - The Okonite Company (Cumberland, RI)				
Johnson, Craig		7/1/2021	3.75	186.00		697.50
		Res sector team meeting and meeting prep, including review of NGrid responses to questions on May data, investigate RGGI HP in raw data, and prep thoughts on RFP updates and processes. Discuss data analysis needs for first draft plan review with team.				
Johnson, Craig		7/2/2021	1.50	186.00		279.00
		Review and distribute follow-up items from yesterday's residential sector team meeting. Compile additional resources and requests for inclusion in the 2022 Plan for Res Retrofit from C-Team and send to National Grid.				
Johnson, Craig		7/6/2021	.50	186.00		93.00
		Contract management - draft EFG Q3 workorder.				
Johnson, Craig		7/7/2021	2.00	186.00		372.00
		Call w/ Grid and OER on BC Model updates for 2022 Plan and potential upcoming PUC Tech session topics. Associated Meeting prep and debrief.				
Johnson, Craig		7/8/2021	.50	186.00		93.00
		Clean up and send out notes from call discussing PUC Tech session topics.				
Johnson, Craig		7/9/2021	1.75	186.00		325.50
		Weekly leads check-in meeting. Discussed recent conversations on DR PIMs, RIIB funding allocation in plan, updates on Council member seats and other legislative updates, follow-ups from PUC Tech session topics. Subcontractor management - finalize and send EFG Q3 Work order.				
Johnson, Craig		7/12/2021	1.50	186.00		279.00
		Send reminders to residential C-Team re: upcoming workstreams and deadlines. Prepare for Plan review, EnergyWise SOW review, and Q2 data review. Send poll reminders for upcoming meetings on EW SOW review and Res Retrofit DD meeting follow-up. Compile and send C-Team thoughts on possible PUC Tech Sessions to OER/Grid.				
Johnson, Craig		7/15/2021	2.75	186.00		511.50
		Check-in w/ internal team to prep for plan and SOW review. Coordinate and schedule meetings for EnergyWise SF/MF SOW review and Res Retrofit Deep Dive follow-up meeting. Review and distribute EnergyWise MF SOW. Check-in meeting w/ Richard F and Mike G on income eligible activities in CT and establishment of pre-weatherization program. Review and distribute EnergyWise SF SOW.				
Johnson, Craig		7/16/2021	5.75	186.00		1,069.50

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Project	7395	Rhode Island EERMC - 2021	Invoice	7217	
		Morning check-in w/ leads team, discuss process and timeline for 2022 draft plan review. Review/distribute relevant sections of 2022 draft plan to sub-contractors. EM&V call - discuss application of MA studies to RI for 2022 Plan. First Draft Plan Review - compare EW participant and savings numbers to what was included in draft SOW for EW program. Review/compare high level program savings/budget numbers. Review updated BC models including PIM tables, emails about the same.			
Johnson, Craig		7/19/2021	4.00	186.00	744.00
		Sector Team - Check-in w/ Adam on upcoming sector team meetings, discussing possible need to push back a week. Coordinate rescheduling meetings. Quick review of residential monthly data report. Review signed Q3 work order for EFG, send to Eric/Cindy for execution. Coordinate OER SharePoint access for C-Team subs, emails w/ Becca. OER/Division Check-in meeting - meeting prep, including review of agenda and draft replies to questions. Attend meeting. Meeting debrief. First Draft Plan review.			
Johnson, Craig		7/20/2021	6.25	186.00	1,162.50
		Check-in with internal team on review of 2022 first draft of annual plan. Develop draft slide deck and outline for C-Team's plan presentation. Add ConnectedSolutions actual and plan data to high-level comparison analysis workbook. Review high-level program comparisons of savings, budgets, and cost to achieve for all residential programs, electric and gas. Identify areas to explore further.			
Johnson, Craig		7/21/2021	3.00	186.00	558.00
		Send reminders to stakeholders on tomorrow's due date for review and comments on EW SF and MF SOWs. Review BC models for Res programs. Check-in meeting w/ Ngrid/OER/Division on notice to Council re: potential overspend on budget. Review and provide feedback on EW SF and MF RFP SOWs. Coordinate w/ subs on plan and SOW review. Review BC/MPS mapping tool for Res programs. Flag QA issues for Adrian.			
Johnson, Craig		7/22/2021	4.00	186.00	744.00
		Review EW SF and MF SOWs. Check-in w/ Mike re: the same. Attend EE TWG meeting. Review Residential Plan narrative and numbers. Develop findings for inclusion in Council presentation. Final review of EW SF and EW MF SOWs. Review and merge C-Team and OER comments and deliver to National Grid.			
Johnson, Craig		7/23/2021	1.25	186.00	232.50
		Review residential plan narrative and numbers. Develop findings for inclusion in Council presentation.			
Johnson, Craig		7/26/2021	3.50	186.00	651.00
		Monthly check-in meeting w/ Margie to discuss plan review, RFP SOW review, and mid-year data report review. Check-in w/ Richard/Glenn on plan review, RFP SOW, and mid-year data report review. Check-in w/ Sam, Adam, and Adrian to coordinate on plan review and getting to Friday deliverable to National Grid. Reschedule August sector team meeting and send reminders re: data review timeline. Meeting w/ National Grid, OER and Division to discuss comments on the EW SF and MF RFP SOWs. Review and consolidate core issues to prep for meeting. Debrief with C-Team			
Johnson, Craig		7/27/2021	4.00	186.00	744.00
		Check-in w/ internal team on plan review process and next steps. Discussed CHP project, narrative review, BC model review, and TRM. Review questions on 2022 Annual Plan from Councilor AnderBois. Assign review and responses to internal team. Review and respond to questions. Review and merge residential team comments on plan narrative. Continued review on residential narrative and BC Models.			
Johnson, Craig		7/28/2021	5.00	186.00	930.00

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Project	7395	Rhode Island EERMC - 2021			Invoice	7217
		Review Glenn's question on RI Res data report. Send update to Adam re: outcomes from SOW review with Grid. Check-in w/ Richard on res data review and upcoming deep dive follow-up meeting. Continued review and merging of residential team comments on plan narrative. Cross check residential section of main text with Attachment 1 to ensure consistency. Review pilots/demos attachment. Continued review on residential BC Models. Review and troubleshoot issues in June Res data report. Review team responses to Councilor AnderBois questions on first draft of 2022 annual plan. Send response to Councilor AnderBois.				
Johnson, Craig		7/29/2021	4.00	186.00		744.00
		Check-in with internal team to coordinate on compiling and delivering C-Team's comments on the first draft of the 2022 annual plan. Continued review of residential plan narrative and BC models.				
Johnson, Craig		7/30/2021	5.00	186.00		930.00
		RI Plan Review - Review and compile C-Team comments on all attachments of the first draft of the 2022 plan in prep for delivery to National Grid. Check-in meetings w/ Mike, Adrian, and Adam to discuss related items. Check-in w/ Mike on PUC and RFP SOW updates. Final review on BC Models.				
Ross, Samuel		7/1/2021	2.75	186.00		511.50
		EM&V coord with M. Honeychuck; disc. re: planning for 2022 Plan Draft review; NWA RFP opp mtg & prep re: same; sched EM&V mtgs following up on June combined call				
Ross, Samuel		7/6/2021	1.25	186.00		232.50
		EMV corresp re: studies / comments due this wk, prep for 1st draft plan				
Ross, Samuel		7/7/2021	4.00	186.00		744.00
		EM&V study coordination & comment consolidation re: NonPart Comm survey; mtg re: 2022 Plan BC Model & PUC Tech sessions; follow up conv. & corresp re: same				
Ross, Samuel		7/8/2021	4.00	186.00		744.00
		DR PIM call, prep & follow up re: same; EM&V corresp incl. upstr. lgting				
Ross, Samuel		7/9/2021	1.75	186.00		325.50
		RI team leads check-in; EM&V comments on upst lighting and MM; conv. w/RI stakeholders re: upcoming EE Plan				
Ross, Samuel		7/13/2021	.50	186.00		93.00
		Gas Pk Dmd study finalize, posted				
Ross, Samuel		7/14/2021	2.75	186.00		511.50
		NonPart Mkting guide comments, Cannabis ISP, App recycling, other EM&V coord; Sue AnderBois onboarding, prep re: same				
Ross, Samuel		7/15/2021	1.75	186.00		325.50
		SRP YTD memo initial discussion & notes re: same; emailing re: gas DR follow ups and EM&V coord w/EcoMetric; coord. re: Plan review				
Ross, Samuel		7/16/2021	4.00	186.00		744.00
		RI Leads coordination discussion; EM&V meetings, prep re: same				
Ross, Samuel		7/19/2021	1.50	186.00		279.00
		C-Team Check In				
Ross, Samuel		7/21/2021	1.75	186.00		325.50
		EE SRP TWG, prep & follow-up re: same;				
Ross, Samuel		7/26/2021	6.25	186.00		1,162.50
		RI Plan Review Check In; PUC SRP Tech Session, prep & follow-up re: same; EM&V correspondence				
Ross, Samuel		7/27/2021	3.25	186.00		604.50

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		EM&V - Cannabis ISP Review, EM&V mtg prep; Plan review, Sue AnderBois Draft Plan review					
Ross, Samuel		7/28/2021	4.25	186.00		790.50	
		EM&V monthly mtg, prep & follow-up re: same; Council meeting prep, incl. supplemental data analysis and slide review time; corresp and mtg scheduling re: NC Programs and MA NC NTG results					
Ross, Samuel		7/29/2021	6.50	186.00		1,209.00	
		Council meeting, prep re: same; debrief re: same					
		Totals		229.00		40,581.75	
		Total Labor				40,581.75	
					Total this Phase	\$50,382.75	

Phase	004	Adv Integ Approaches & Emerging Issues					
Optimal Staff							
			Hours	Rate	Amount		
Guerard, Michael		7/8/2021	1.50	198.00		297.00	
		DR PIM discussison, prep and debriefs					
Guerard, Michael		7/13/2021	1.25	198.00		247.50	
		Jurisdictional research on incentives for Gas heating equipment					
Guerard, Michael		7/30/2021	1.25	198.00		247.50	
		Review docket 4770-4780 docket materials from Grid, PUC, OER					
		Totals		4.00		792.00	
		Total Labor				792.00	
					Total this Phase	\$792.00	
					Total this Project	\$74,118.25	
					Total this Report	\$74,118.25	

Invoice



August 31, 2021
Project No: 7395
Invoice No: 7234

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2021

Professional Services from August 1, 2021 to August 31, 2021

Phase	001	EERMC Oversight	<hr style="border-top: 1px dashed black;"/>		
Optimal Staff					
			Hours	Rate	Amount
		Caesar, Adrian	.50	135.00	67.50
		Guerard, Michael	45.25	198.00	8,959.50
		Johnson, Craig	37.50	186.00	6,975.00
		Totals	83.25		16,002.00
		Total Labor			16,002.00
Subcontractors					
		Rachel Sholly			2,208.75
		EcoMetric Consulting, LLC			3,146.00
		Ralph Prah			3,465.00
		Total Subcontractors			8,819.75
				Total this Phase	\$24,821.75

Phase	002	Dev of Work Products & Rep. of EERMC	<hr style="border-top: 1px dashed black;"/>		
Optimal Staff					
			Hours	Rate	Amount
		Belliveau, Eric	5.75	212.00	1,219.00
		Ross, Samuel	33.00	186.00	6,138.00
		Totals	38.75		7,357.00
		Total Labor			7,357.00

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Project	7395	Rhode Island EERMC - 2021	Invoice	7234
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Subcontractors

Core Energy Insights Inc.	558.00		
Total Subcontractors	558.00		558.00
		Total this Phase	\$7,915.00

Phase	003	EE & System Reliab. Prog. Design & Deliv
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Optimal Staff

	Hours	Rate	Amount
Caesar, Adrian	40.25	135.00	5,433.75
Guerard, Michael	32.75	198.00	6,484.50
Jacobs, Adam	22.75	186.00	4,231.50
Johnson, Craig	65.25	186.00	12,136.50
Ross, Samuel	23.25	186.00	4,324.50
Totals	184.25		32,610.75
Total Labor			32,610.75

Subcontractors

Jennifer Chiodo	1,237.50		
Energy Futures Group, Inc.	3,366.00		
Total Subcontractors	4,603.50		4,603.50
		Total this Phase	\$37,214.25

Phase	004	Adv Integ Approaches & Emerging Issues
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Optimal Staff

	Hours	Rate	Amount
Guerard, Michael	1.25	198.00	247.50
Totals	1.25		247.50
Total Labor			247.50
		Total this Phase	\$247.50

Billing Limits

	Current	Prior	To-Date
Total Billings	70,198.50	415,326.00	485,524.50
Limit			631,263.00
Remaining			145,738.50
		Total this Invoice	\$70,198.50

Billings to Date

	Current	Prior	Total
Labor	56,217.25	317,022.00	373,239.25
Subcontractor	13,981.25	98,304.00	112,285.25
Totals	70,198.50	415,326.00	485,524.50

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Project	7395	Rhode Island EERMC - 2021	Invoice	7234
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Project 7395 Rhode Island EERMC - 2021 Invoice 7234

Billing Backup

Friday, October 1, 2021

Optimal Energy Inc.

Invoice 7234 Dated 8/31/2021

6:53:23 PM

Phase 001 EERMC Oversight

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian	8/12/2021		.50	135.00	67.50
	August EERMC materials upload				
Guerard, Michael	8/2/2021		1.00	198.00	198.00
	OER/Division/C-team check-in				
Guerard, Michael	8/3/2021		1.25	198.00	247.50
	Respond to OER query on counsel attendance at PUC session; OER/Grid/C-team chk-in call				
Guerard, Michael	8/4/2021		.50	198.00	99.00
	Review draft Aug EERMC agenda for Becca/OER; review emails from OER to PUC on tech session				
Guerard, Michael	8/5/2021		1.25	198.00	247.50
	Coordation tasks on PUC session, OER transitions				
Guerard, Michael	8/6/2021		1.00	198.00	198.00
	Set up mtgs on PUC, OER transition; rpep for EERMC expected EERMC material development on Plan draft				
Guerard, Michael	8/9/2021		2.25	198.00	445.50
	EERMC mtg prep calls with Grid on Q@ report and team on other deliverables;draft EERMC materials, savings estimates				
Guerard, Michael	8/10/2021		3.00	198.00	594.00
	OER check-in call on EERMC mtg, transition; EERMC mtg material dev - edit C-E Report				
Guerard, Michael	8/11/2021		2.75	198.00	544.50
	Call w OER on EERMC tech session on EE issues, set up gannt chart; monitor PUC Open Mtg for 2021 Plan ruling; work on EERMC mtg materials				
Guerard, Michael	8/12/2021		4.25	198.00	841.50
	Develop, coordinate and finalize EERMC meetings materials to send to OER				
Guerard, Michael	8/13/2021		3.25	198.00	643.50
	Review Grid's EERM Ppt for EERMC mtg; Follow-up on PUC EERMC workshop; EERMC mtg debriefs; set up 1-1 with PGC				
Guerard, Michael	8/16/2021		4.25	198.00	841.50
	Team calls and work on finalizing 2022 Plan memo for EERMC; OER/Div/C-team chk-in				
Guerard, Michael	8/17/2021		2.50	198.00	495.00
	Chk-in call w Grid/OER; call w OER on PUC EERMC workshop; review Education next steps with D&S				
Guerard, Michael	8/18/2021		3.25	198.00	643.50
	Team calls to prep for EERMC mtg; 1-1 w P.Case; debrief on SRP TWG				
Guerard, Michael	8/19/2021		3.00	198.00	594.00
	EERMC mtg prep				
Guerard, Michael	8/20/2021		1.25	198.00	247.50
	EERMC mtg debriefs				

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Page 4

Project	7395	Rhode Island EERMC - 2021			Invoice	7234
Guerard, Michael		8/27/2021	1.00	198.00		198.00
		Send out emails to each council member on preliminary issues and concerns on TWG presentation on 2022 Plan				
Guerard, Michael		8/30/2021	4.25	198.00		841.50
		Follow-up steps on council memo, 1-1s; coord with Marisa; update w P.Case; update PUC workshop gannt chart				
Guerard, Michael		8/31/2021	5.25	198.00		1,039.50
		Check-in call w OER/Div/C-team; Call with OR on 2022 EE Plan options, next steps; chk-in call with OER/Grid; PUC workshop discussion/options to re-schedule; check-in call w Marisa				
Johnson, Craig		8/5/2021	.25	186.00		46.50
		Check-in w/ internal team on upcoming deadlines for council meeting materials.				
Johnson, Craig		8/6/2021	.50	186.00		93.00
		Morning check-in w/ internal team - discussed deliverables timeline and responsibilities for upcoming Council meeting.				
Johnson, Craig		8/9/2021	.75	186.00		139.50
		Check in with internal team on timeline and assignments for Council meeting materials. Coordinate with National Grid on development of Q2 presentation to the Council.				
Johnson, Craig		8/10/2021	2.00	186.00		372.00
		Council meeting materials - morning check-in on status of material development. Summarize tasks and next steps. Review Grid's official Q2 numbers for Q2 update. Outline memo for our response to Grid's August 12th update on the 2022 Plan.				
Johnson, Craig		8/11/2021	5.00	186.00		930.00
		Check-in w/ internal team on Council meeting material deliverables. Develop content for Q2 update slides for Council meeting. Coordinate w/ Adam on C&I content for presentation.				
Johnson, Craig		8/12/2021	4.75	186.00		883.50
		Check-in w/ internal team on Council meeting material deliverables. Develop content for Q2 update slides for Council meeting. Review updated year-end forecast numbers, including forecasts for individual program spending and savings. Review, provide feedback and finalize EM&V/BC Model update presentation. Package and deliver meeting materials to OER.				
Johnson, Craig		8/13/2021	3.00	186.00		558.00
		Check-in w/ internal team on development of memo that responds to Grid's interim update. Dvelop memo in response to Grid's interim plan update.				
Johnson, Craig		8/16/2021	9.25	186.00		1,720.50
		Develop analysis and memo content for C-Team response to National Grid interim update on 2022 plan. Review Grid's interim update and compare with initial plan presentation. Check number of comments submitted/provided to the Company. Check-in meetings w/ Mike and Adrian, as well as with OER on status and messaging of memo. Finalize and submit memo and post to Council website.				
Johnson, Craig		8/17/2021	1.75	186.00		325.50
		Prep for Council meeting - discuss slides and talking points for Q2 update. Coordination with Mike and Eric about coverage for the Council meeting.				
Johnson, Craig		8/18/2021	4.00	186.00		744.00
		Prep for Council meeting. Check-in meetings w/ Mike and Rachel re: same. 1-on-1 Council Prep with Peter. Review Grid's update on bill and rate impacts, and analysis on increase of SBC.				
Johnson, Craig		8/19/2021	5.25	186.00		976.50

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Project	7395	Rhode Island EERMC - 2021	Invoice	7234	
		Prep for Council meeting. Review materials and talking points for Gas Overspend vote, Q2 and EM&V/BC Model updates presentation, and memo on Grid's Interim update on 2022 Plan. Check-in/prep meeting with OER. Council meeting.			
Johnson, Craig		8/20/2021	1.00	186.00	186.00
		write up debrief notes and action items from the Council meeting.			
		Totals	83.25		16,002.00
		Total Labor			16,002.00
				Total this Phase	\$24,821.75

Phase	002	Dev of Work Products & Rep. of EERMC			
Optimal Staff					
			Hours	Rate	Amount
Belliveau, Eric		8/5/2021	1.50	212.00	318.00
		call with MG on project management during illness, discuss Grid plan and review process and outcomes.			
Belliveau, Eric		8/6/2021	1.25	212.00	265.00
		leads call with team - Grid plan, project management decisions			
Belliveau, Eric		8/19/2021	1.50	212.00	318.00
		EERMC prep call with team, brief check in with EERMC members, review EERMC needs in project management for MG absence.			
Belliveau, Eric		8/20/2021	.50	212.00	106.00
		abbreviated leads call			
Belliveau, Eric		8/25/2021	1.00	212.00	212.00
		weigh in on SBC allocatoin suggestion with MG, discuss plan in general and analysis required to properly vet			
Ross, Samuel		8/9/2021	4.00	186.00	744.00
		Council materials prep meeting, initial call with NGrid re: EM&V presentation			
Ross, Samuel		8/10/2021	4.00	186.00	744.00
		EE Plan stakeholder comments review to inform Council materials; initial work on comments memo; initial draft of cost-effectiveness memo outline			
Ross, Samuel		8/11/2021	8.75	186.00	1,627.50
		EE Plan Review & Comments for Council Materials, incl. EM&V slides; PUC Tech Session Prep			
Ross, Samuel		8/12/2021	7.00	186.00	1,302.00
		EERMC Council Materials, , incl. EM&V slides and EE comments			
Ross, Samuel		8/26/2021	3.25	186.00	604.50
		Initial work on TWG outcomes memo/messaging for Council Members			
Ross, Samuel		8/27/2021	5.50	186.00	1,023.00
		Finalizing C-Team TWG takeaways memo/messaging, incl. debrief call with OER; team mtg re: same and coord. messaging back to NGrid			
Ross, Samuel		8/30/2021	.50	186.00	93.00
		Memo Check In; Councilor email review			
		Totals	38.75		7,357.00
		Total Labor			7,357.00
				Total this Phase	\$7,915.00

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Project	7395	Rhode Island EERMC - 2021	Invoice	7234	
Phase	003	EE & System Reliab. Prog. Design & Deliv			
Optimal Staff					
			Hours	Rate	Amount
Caesar, Adrian		8/2/2021	.50	135.00	67.50
		2022 EE budget reallocation exercise - CHP incentive			
Caesar, Adrian		8/3/2021	2.25	135.00	303.75
		TRM/EM&V study/BC model comps and discussion			
Caesar, Adrian		8/4/2021	.25	135.00	33.75
		TRM/EM&V study/BC model comps and comments, Budget reallocation and additional savings analysis relative to targets			
Caesar, Adrian		8/5/2021	3.00	135.00	405.00
		TRM/EM&V study/BC model comps			
Caesar, Adrian		8/6/2021	2.25	135.00	303.75
		Weekly RI leads check-in, TRM BCR model comps review, 2022 Annual plan Data questions update			
Caesar, Adrian		8/9/2021	.50	135.00	67.50
		August EERMC meeting prep, NGrid 2022 Plan budget and potential savings analysis			
Caesar, Adrian		8/10/2021	5.00	135.00	675.00
		August EERMC meeting prep, NGrid 2022 Plan budget and potential savings analysis, CHP budget redistribution analysis			
Caesar, Adrian		8/11/2021	2.50	135.00	337.50
		August EERMC meeting deliverables prep, NGrid 2022 Plan budget and potential savings analysis, CHP budget redistribution analysis			
Caesar, Adrian		8/12/2021	3.75	135.00	506.25
		August EERMC materials prep, Res and C&I sector team call prep and notetaking			
Caesar, Adrian		8/13/2021	3.25	135.00	438.75
		Weekly RI leads check in, EERMC Memo - response to NGrid 2022 plan interim updates, Q2 Data report update, July C&I Data report			
Caesar, Adrian		8/16/2021	5.00	135.00	675.00
		2022 Annual plan first draft/interim updates memo development, July Res and C&I data reports			
Caesar, Adrian		8/18/2021	.50	135.00	67.50
		Review of NGrid responses to C-team 2022 first draft/TRM/BCR data questions			
Caesar, Adrian		8/19/2021	3.00	135.00	405.00
		August EERMC mtg/mtg prep			
Caesar, Adrian		8/25/2021	.50	135.00	67.50
		August TWG mtg prep, 2022 interim update and Grid TWG presentation review			
Caesar, Adrian		8/26/2021	5.25	135.00	708.75
		August TWG prep call, NGrid revised 2022 Plan interim update review, August TWG meeting and debrief, 2022 plan update - Councilor memo development			
Caesar, Adrian		8/27/2021	2.75	135.00	371.25
		2022 Plan interim update and TWG presentation on 2022 Plan Council memo development			
Guerard, Michael		8/2/2021	3.50	198.00	693.00
		Prep for Grid MF mtg; review stakeholder comments submitted on 2022 EE Plan; team call on upcoming tasks			

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Project	7395	Rhode Island EERMC - 2021			Invoice	7234
Guerard, Michael		8/3/2021	3.25	198.00		643.50
		MF mtg held by Grid, prep and debriefs; prep and debriefs on Res Retro deep dive mtg; Review EMV study tracker from Sam; coord getting team subs preped for Plan review				
Guerard, Michael		8/4/2021	2.75	198.00		544.50
		CI EMV mtg prep and debrief; follow-ups on MF mtg; high level review of TRM				
Guerard, Michael		8/5/2021	1.00	198.00		198.00
		Review Grid Division's IRs on CHP project, update team; review Gas DR comments from Becca/OER				
Guerard, Michael		8/6/2021	3.00	198.00		594.00
		Follow-up review of 2022 Plan, stakeholder comments				
Guerard, Michael		8/10/2021	.75	198.00		148.50
		Review updates on CHP project IRs between Div and Grid				
Guerard, Michael		8/11/2021	1.00	198.00		198.00
		Review and send MF mtg notes to CJ; review jurisdictional approaches to incentivizing hi-eff gas equipment				
Guerard, Michael		8/12/2021	1.25	198.00		247.50
		Prep and debriefs on Res and CI sector monthly meetings				
Guerard, Michael		8/17/2021	1.25	198.00		247.50
		Review Res and C&I monthly data from AC				
Guerard, Michael		8/18/2021	.50	198.00		99.00
		Review SBC increase drivers				
Guerard, Michael		8/20/2021	.75	198.00		148.50
		Review BC model inputs				
Guerard, Michael		8/23/2021	2.75	198.00		544.50
		Team updates on rate/bill impacts/sbc/CHP; Repsond to J Garlick, PC, Tony on MA electrification efforts				
Guerard, Michael		8/25/2021	3.25	198.00		643.50
		EE TWG mtg prep; Coord w OER on Grid's language for Regulatory funding; review monthly res EMV tracker				
Guerard, Michael		8/26/2021	4.00	198.00		792.00
		EE TWG mtg prep call w OER; EE TWG call, debrief meetings				
Guerard, Michael		8/27/2021	3.75	198.00		742.50
		Coord. follow-up email to Grid on TWG next steps; Prepare draft memo for Council on TWG findings, status of Plan; Review IE BP mtg notes, review dtata; coord w CJ				
Jacobs, Adam		8/9/2021	2.00	186.00		372.00
		-Review Docket 5076 - RI Grows CHP - Responses to Division Data Requests - Set 1 (Part 2) -check-in w/ Craig on 2022 savings shortfall and quantifiable opportunities to improve -analysis on C&I savings potential Grid is not pursuing				
Jacobs, Adam		8/10/2021	1.75	186.00		325.50
		-RI daily scrum/planning check-in -RI 2022 Annual Plan Analysis Check-In -RI C&I NC program design re: MNA NTG results call -check-in w/ Adrian on alternate investments for similar cost of \$13M CHP project				
Jacobs, Adam		8/11/2021	2.25	186.00		418.50

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Project	7395	Rhode Island EERMC - 2021		Invoice	7234
		-RI daily scrum/check-in on planning and council meeting tasks -RI Budget/CHP Analysis Check-In -check-in w/ subs on additional C&I savings opportunities analysis -review Adrian 2022 Plan/CHP Analysis for Memo -Q2 Presentation C&I slides			
Jacobs, Adam		8/12/2021	1.00	186.00	186.00
		-RI monthly C&I sector team call			
Jacobs, Adam		8/13/2021	2.25	186.00	418.50
		-distribute follow-ups from Aug C&I sector team meeting -RI leads check-in call -informal check-in w/ Grid C&I lead on draft plan comments and RFP SOWs -follow-up questions to Grid on pilots/demos ending in 2021			
Jacobs, Adam		8/16/2021	2.75	186.00	511.50
		-check-in w/ Craig and Mike on draft plan memo -finish additional savings potential analysis -work on council memo RE: draft plan			
Jacobs, Adam		8/17/2021	1.50	186.00	279.00
		-RI daily scrum + check-in on EERMC meeting prep -send Craig talking points for C&I slides -review C&I July data report and enter questions in tracker -share C&I July data report w/ subs for review/comment -review NGrid Q2 report for inclusion of various commitments due this quarter			
Jacobs, Adam		8/18/2021	.75	186.00	139.50
		-RI daily scrum/check-in on planning -talking points for C&I interim plan updates from NGrid (CHP and non-lighting savings)			
Jacobs, Adam		8/19/2021	.25	186.00	46.50
		-add subcontractor questions to implementation and oversight tracker			
Jacobs, Adam		8/20/2021	.75	186.00	139.50
		-review August EERMC meeting notes -review NGrid responses to C-team data related questions on first draft 2022 plan -note to Josh from Grid RE: councilor request on grocer initiative from EERMC meeting			
Jacobs, Adam		8/24/2021	.75	186.00	139.50
		-RI daily scrum -planning check-in on next steps for TWG			
Jacobs, Adam		8/25/2021	1.25	186.00	232.50
		-RI daily scrum + planning check-in -Catch-up w/ Grid C&I on councilor request -check-in w/ Craig on sector team meeting agendas			
Jacobs, Adam		8/26/2021	3.25	186.00	604.50
		-review of NGrid TWG slides and internal prep call -review Docket No. 5076 National Grid - DIV Set 2 -check-in w/ OER before TWG -August TWG meeting -draft and send out Sept C&I sector team call agenda -follow-ups to Nathan on C&I comments at TWG (CHP and HVAC)			
Jacobs, Adam		8/27/2021	1.75	186.00	325.50
		-RI leads check-in -C&I sections of C-Team 2022 EE Plan Review Interim Update memo			
Jacobs, Adam		8/30/2021	.25	186.00	46.50
		-review RI C&I EM&V tracker and ask Sam about pending custom impact evals			

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Project	7395	Rhode Island EERMC - 2021			Invoice	7234
Jacobs, Adam		8/31/2021	.25	186.00		46.50
		-Grocery Initiative in RI follow-ups w/ councilor AnderBois				
Johnson, Craig		8/1/2021	2.00	186.00		372.00
		Update June Residential Data Report content. Review June Residential Data Report.				
Johnson, Craig		8/2/2021	7.25	186.00		1,348.50
		Review June Residential Data Report, consolidate and send questions to National Grid. Check-in w/ Mike on variety of upcoming RI work streams including check-ins w/ Division, OER, and Grid, upcoming MF Stakeholder and Res Retrofit Deep Dive meetings, continued plan review, and potential PUC Tech Session topics. Attend C-Team/OER/Division check-in meetings. Prep for MF Stakeholder Session and Res Retrofit Deep Dive meetings. Discuss CHP analysis w/ Adrian and Griff. Summary notes and follow-up items from C-Team/OER/Division check-in.				
Johnson, Craig		8/3/2021	6.25	186.00		1,162.50
		Review and compare 2022 BC Models with compliance and original 3YP 2022 filings. Analysis to identify additional savings opportunities. C-Team/OER/National Grid check-in meeting. Check-in w/ Mike and Adrian on template for cataloging areas of additional savings opportunities. Res Retrofit Deep Dive Follow-up meeting. Associated meeting prep and debrief. Check-in w/ Sam on upcoming EM&V/sector meetings on New Construction programs. Also discussed need for materials on upcoming council meeting on EM&V updates to BC Models.				
Johnson, Craig		8/4/2021	4.25	186.00		790.50
		Internal check in with team to discuss upcoming analysis and deliverable. Discussed BC Model/TRM comparison, analyses to show what savings are being left on the table, and upcoming council meeting materials. Work on analysis to show additional savings that could be captures through the residential retrofit programs.				
Johnson, Craig		8/5/2021	.25	186.00		46.50
		Check-in w/ internal team on upcoming deadlines for plan review.				
Johnson, Craig		8/6/2021	3.50	186.00		651.00
		Draft and send out agenda for August residential sector team meeting. Morning check-in w/ internal team - discussed process/next steps for delivering comments on TRM DB and BC Model comparison. TRM DB and BC Model comparison - ID top electric and gas savings measures in each sector for review. Set up tool to review and compare key inputs in BC Model and TRM DB. Conduct review and flag issues for electric measures. Discussions w/ Sam and Adrian re: the same.				
Johnson, Craig		8/9/2021	.75	186.00		139.50
		Check in with internal team on status of analyses to demonstrate savings being left on the table. Check-in w/ Adam on quantifying additional savings opportunities for the C&I sector.				
Johnson, Craig		8/10/2021	.50	186.00		93.00
		Check-in w/ Adam and Adrian on analysis for additional savings left on the table.				
Johnson, Craig		8/11/2021	1.50	186.00		279.00
		E-mail follow-up on various items including Grid update on PDAs and the MF stakeholder session. Check-in w/ Adrian and Adam on budget/savings analysis for additional savings to help inform response to Grid's Aug 12th update. Monitor PUC open meeting on Docket 5076				
Johnson, Craig		8/12/2021	3.50	186.00		651.00
		Res Sector Team Meeting - Prep for meeting including reviewing responses to C-Team questions and updates to commitments tracker and identify follow-up questions to commitments updates				

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Project	7395	Rhode Island EERMC - 2021			Invoice	7234
Johnson, Craig		8/13/2021	3.50	186.00		651.00
		Review Grid's interim update slides. Additional analysis on additional savings being left on the table to help inform memo to council in response to Grid's interim update				
Johnson, Craig		8/17/2021	2.00	186.00		372.00
		Bi-weekly check-in w/ OER/Ngrid - Attend meeting, associated meeting prep and debrief.				
Johnson, Craig		8/18/2021	1.50	186.00		279.00
		SRP TWG Meeting; associated meeting prep. Review Grid responses to C-Team BC model/data questions.				
Johnson, Craig		8/20/2021	1.50	186.00		279.00
		Review July data report and develop questions for Grid. Review/cross-check commitment updates with Quarterly Report, ask follow up questions. Review Grid responses to C-Team data questions on first draft of Plan.				
Johnson, Craig		8/24/2021	.50	186.00		93.00
		Check-in w/ internal team on next steps for coordinating with Council and Grid on 2022 Plan.				
Johnson, Craig		8/25/2021	4.00	186.00		744.00
		Check-in with internal team on upcoming RI work including review of Grid's TWG meeting update, response for Council, and drafting agendas for sector team meetings. Check-in with Adam to brainstorm meeting agenda topics for next week sector team meetings. Draft agenda for residential sector team meeting. Review Grid 2022 Annual Plan interim update for TWG. Compile notes re: same. Draft memo's to Councilors updating them on the status.				
Johnson, Craig		8/26/2021	11.00	186.00		2,046.00
		TWG Meeting. Review materials in advance for prep, and internal prep call with team and OER. Meeting debrief. Outline next steps on Councilor update memos. Develop content for Councilor update memos, discussions w/ Adrian and Sam re: the same. IES 2021 Q3 Best Practices meeting. Strategize with internal team about response to Grid's interim updates. Discuss next steps needed if plan becomes contested. Distribute agenda for next week's residential sector team meeting. On memo content, summarize TWG stuff, pull out items we commented on that haven't received update on.				
Johnson, Craig		8/27/2021	7.25	186.00		1,348.50
		Review draft sections of memo update to the Council, provide feedback. Develop content for memo, including tables that highlight key sector comments that Grid has not addressed. Develop draft e-mail of outstanding items that Grid needs to address as response to August TWG meeting. Check-in meeting w/ OER - debrief TWG, discuss additional Council meeting, and upcoming PUC workshop.				
Johnson, Craig		8/30/2021	.50	186.00		93.00
		Monthly check-in w/ Margie.				
Johnson, Craig		8/31/2021	3.75	186.00		697.50
		EE Check-in meeting w/ OER and the Division. Meeting prep and debrief. EE Check-in meeting w/ OER and National Grid. Meeting prep and debrief. Prep next steps and strategize final plan review.				
Ross, Samuel		8/3/2021	1.25	186.00		232.50
		gas DR corresp.; EM&V mtg prep; internal team disc				
Ross, Samuel		8/4/2021	3.75	186.00		697.50
		EM&V meeting, prep and follow-up re: same; mkting implementer interview comments; RNC baseline comments; intial outreach to NGrid re: EM&V Council Presentation				
Ross, Samuel		8/5/2021	.50	186.00		93.00

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Project	7395	Rhode Island EERMC - 2021		Invoice	7234
		EcoMetric Invoice Review			
Ross, Samuel		8/6/2021	3.00	186.00	558.00
		Solar PFC mtg; Res NC call; Res NC & Code compliance study comments			
Ross, Samuel		8/10/2021	1.00	186.00	186.00
		C&I NC conversation			
Ross, Samuel		8/11/2021	.25	186.00	46.50
		EM&V corresp			
Ross, Samuel		8/23/2021	.25	186.00	46.50
		initial review of EM&V emails from week off			
Ross, Samuel		8/24/2021	.75	186.00	139.50
		EM&V email catch up from week off			
Ross, Samuel		8/25/2021	2.25	186.00	418.50
		EM&V meeting, prep and follow-up re: same; team disc. re: EE TWG and division of tasks in coming weeks; initial TWG slide review; coord w/OER re: TWG review & conv			
Ross, Samuel		8/26/2021	6.25	186.00	1,162.50
		EE TWG, second review of NGrid slides, prep & follow up meetings re: same; debrief with Peter Gill Case			
Ross, Samuel		8/30/2021	.50	186.00	93.00
		EM&V agenda; corresp re: EM&V studies incl. Solar PFC			
Ross, Samuel		8/31/2021	3.50	186.00	651.00
		EE Check In, PUC prep workshop (repurposed), NGrid Check In; internal prep mtgs re: the above			
		Totals	184.25		32,610.75
		Total Labor			32,610.75
				Total this Phase	\$37,214.25

Phase	004	Adv Integ Approaches & Emerging Issues			
Optimal Staff					
			Hours	Rate	Amount
Guerard, Michael		8/5/2021	1.25	198.00	247.50
		Review NEEPs 2021 Q2 Report for RI			
		Totals	1.25		247.50
		Total Labor			247.50
				Total this Phase	\$247.50
				Total this Project	\$70,198.50
				Total this Report	\$70,198.50

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I N V O I C E

BILLED TO

Mike Guerard
Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

TOTAL DUE

\$3,146.00

Project Name	RI EEMRC Consultant	Invoice Date	09/07/2021
Project #	7395	Due Date	10/07/2021
Invoice #	1029-P8-21	Payment Terms	Net 30
Billing Period	07/31/2021 - 08/27/2021		

Task Number	Description	Amount
Task 1	EM&V Oversight	\$3,146.00
Task 2	Program Design & Policy	\$0.00

Subtotal	\$3,146.00
Invoice Total	\$3,146.00

Invoice Number 1029-P8-21
Period 07/31/2021 - 08/27/2021

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	EM&V Oversight	Salil Gogte	Partner	2021-08	0	\$ 212.00	\$ -
RI EEMRC Consultant	EM&V Oversight	Michael Frischmann	Partner	2021-08	0	\$ 212.00	\$ -
RI EEMRC Consultant	EM&V Oversight	Michael Honeychuck	Managing Consultant	2021-08	7	\$ 198.00	\$ 1,386.00
RI EEMRC Consultant	EM&V Oversight	Bitul Sinha	Sr Engineer	2021-08	11	\$ 160.00	\$ 1,760.00
RI EEMRC Consultant	EM&V Oversight	Divya Prasanna	Project Coordinator	2021-08	0	\$ -	\$ -
Total					18.0		\$ 3,146.00

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	Program Design & Policy	Salil Gogte	Partner	2021-08	0	\$ 212.00	\$ -
RI EEMRC Consultant	Program Design & Policy	Michael Frischmann	Partner	2021-08	0	\$ 212.00	\$ -
RI EEMRC Consultant	Program Design & Policy	Michael Honeychuck	Managing Consultant	2021-08	0	\$ 198.00	\$ -
RI EEMRC Consultant	Program Design & Policy	Bitul Sinha	Sr Engineer	2021-08	0	\$ 160.00	\$ -
RI EEMRC Consultant	Program Design & Policy	Divya Prasanna	Project Coordinator	2021-08	0	\$ -	\$ -
Total					-		\$ -

Full Name	Task	fname	lname	local_date	hours	task	notes
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	8/9/2021	0.75	EM&V Oversight	Catch up on emails re: monthly calls, solar PFC, & other studies
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	8/10/2021	0.75	EM&V Oversight	Weekly check-in with Salil
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	8/11/2021	1.5	EM&V Oversight	Catch up on emails re: monthly calls, solar PFC, & other studies
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	8/12/2021	1.25	EM&V Oversight	Status update call with Bitul about recent calls and study reviews
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	8/19/2021	0.75	EM&V Oversight	Review upstream lighting study
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	8/23/2021	1	EM&V Oversight	Emails with Sam
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	8/25/2021	1	EM&V Oversight	Emails with Bitul & Sam about current status & upstream lighting study
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/3/2021	2.5	EM&V Oversight	Review appliance recycling documents
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/4/2021	3	EM&V Oversight	Review appliance recycling documents
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/5/2021	1.5	EM&V Oversight	Review appliance recycling documents
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/6/2021	3	EM&V Oversight	Review appliance recycling documents
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/11/2021	1	EM&V Oversight	Review appliance recycling documents
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/3/2021	2.5	EM&V Oversight	Emails with Sam
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/4/2021	3	EM&V Oversight	Monthly residential call with C-team & National Grid
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/5/2021	1.5	EM&V Oversight	Res NC Memo review & assemble comments
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/6/2021	3	EM&V Oversight	C&I EM&V Monthly check-in with C-Team & National Grid
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/11/2021	1	EM&V Oversight	Emails and discussions with Vijay and Sam about solar PFC status
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/5/2021	1.5	EM&V Oversight	EM&V internal check-in w/ Sam
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/6/2021	3	EM&V Oversight	Emails & discussions about recent studies & memos
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/6/2021	3	EM&V Oversight	Solar PFC Discussion with National Grid
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/11/2021	1	EM&V Oversight	Memo review, research & analysis
Bitul Sinha	EM&V Oversight	Bitul	Sinha	8/11/2021	1	EM&V Oversight	Status update call with Mike

Energy Futures Group, Inc.
PO Box 587
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 4792
Invoice Date: August 31, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services	Amount		
Services Performed 8/1/2021 through 8/31/2021			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	17.00	\$198.00	\$3,366.00
LABOR - Intern Hours	0.00	\$50.00	\$0.00
LABOR - Travel Hours	0.00	\$99.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$3,366.00</u>

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
8/6/2021	Annual plan discussion with C&I lighting subgroup			1.25			1.25	0.00	1.25
8/9/2021	RI Plan review next steps questions			0.25			0.25	0.00	0.25
8/9/2021	RI Plan Reviews			0.50			0.50	0.00	0.50
8/9/2021	G. Reed check in and review plan for more savings ideas			3.00			3.00	0.00	3.00
8/9/2021	RI check-in call w/Richardl Plan review and review of responses to our comments			1.50			1.50	0.00	1.50
8/10/2021	Update on Federal lighting standards			0.25			0.25	0.00	0.25
8/10/2021	Quantify savings estimates for RI plan comments			2.00			2.00	0.00	2.00
8/10/2021	Follow up with Optimal re. RI next steps			0.25			0.25	0.00	0.25
8/10/2021	Review of Grid's Responses to Consultant Plan comments			0.25			0.25	0.00	0.25
8/12/2021	Review info on pilots, demonstrations, and assessments			0.50			0.50	0.00	0.50
8/12/2021	Attend monthly RI Res. Sector Tream call w/Grid; prep and follow up notes to Richard			1.50			1.50	0.00	1.50
8/13/2021	Send Ngrid info on upstream lighting control savings factors			0.50			0.50	0.00	0.50
8/17/2021	Participate in New England Consultant Coordinating call			0.25			0.25	0.00	0.25
8/20/2021	Prep agenda for lighting sub-group; lead lighting call; send out notes			1.50			1.50	0.00	1.50
8/23/2021	Pull window screening results from CT for Angela Li			0.50			0.50	0.00	0.50
8/24/2021	Response to request on CT's ESRPP BCR model inputs			0.50			0.50	0.00	0.50
8/26/2021	Follow up on ESRPP NTG			1.00			1.00	0.00	1.00
8/27/2021	Follow up on ESRPP NTG and call w/C. Johnson			1.25			1.25	0.00	1.25
8/27/2021	Review DOE notice on EISA/GSL; share info with program staff			0.25			0.25	0.00	0.25
							0.00	0.00	0.00
	Total hours	0.00	0.00	17.00	0.00	0.00	17.00	0.00	17.00
	Total Amount	\$0.00	\$0.00	\$3,366.00	\$0.00	\$0.00	\$3,366.00	0.00	\$3,366.00

Margie Lynch/Core Energy Insights, Inc.
4445 E. Hoback River Road, Jackson, WY 83001

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 8-2021*
Invoice Date: *August 31, 2021*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services	Amount
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Services Performed 08/01/2021 through 08/31/2021

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	3.00	\$186.00	\$558.00

TOTAL DUE

\$558.00

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
8/3/21	Participated in EnergyWise deep dive meeting		1.00				1.00	0.00	1.00
8/12/2021	Participated in res sector meeting		1.00				1.00	0.00	1.00
8/30/2021	Check in call w/C. Johnson		0.50				0.50	0.00	0.50
8/31/2021	Reviewed 2022 plan update materials		0.50				0.50	0.00	0.50
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	3.00	0.00	0.00	0.00	3.00	0.00	3.00
	Total Amount	\$0.00	\$550.00	\$0.00	\$0.00	\$0.00	\$550.00	0.00	\$550.00

Ralph Prah
7001 Stanhope Place, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 22
Invoice Date: August 31, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 07/01/21 through 08/31/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	17.50	\$198.00	\$3,465.00
LABOR - Travel Hours	0.00	\$99.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$3,465.00</u>

Date	Description of Services	001 - Policy Strategy □	002- Cyclical Planning □ Reporting Activities	003 - EERMC Oversight □	Sub-Total Regular □rs.	Sub-Total Travel □rs.	Total □ours
7/1/2021	NP study, lighting market model study	0.25			0.25	0.00	0.25
7/4/2021	NP study; C&I ltg market model study; 2022 eval plan	0.50			0.50	0.00	0.50
5-Jul	C&I ltg market model study	0.25			0.25	0.00	0.25
7/6/2021	C&I ltg market model; ltg controls memo	0.25			0.25	0.00	0.25
7/7/2021	C&I ltg market model	0.25			0.25	0.00	0.25
7/13/2021	NP study; upstrm ltg impact eval	0.75			0.75	0.00	0.75
7/16/2021	conf calls on use of MA results in 2022 impact assumptions, 2022 eval plan, and leg study recs, + prep	3.00			3.00	0.00	3.00
7/19/2021	2022 plan – leg study recs, ev pl	0.25			0.25	0.00	0.25
7/28/2021	RNC baseline res plan; NP study	0.50			0.50	0.00	0.50
8/3/2021	RNC baseline res plan; mtg prep; 2022 NC NTG assumptions	1.25			1.25	0.00	1.25
8/4/2021	C&I studies check-in call	0.75			0.75	0.00	0.75
8/5/2021	NP study; cannabis ISP study; C&I upstrm ltg impact report	0.75			0.75	0.00	0.75
8/6/2021	RNC NTG call; cannabis ISP study	0.75			0.75	0.00	0.75
8/9/2021	cannabis res plan	1.25			1.25	0.00	1.25
8/10/2021	conf call on NRNC impact parameters + prep	0.75			0.75	0.00	0.75
8/12/2021	upst ltg; ARP report; P and NP studies	0.75			0.75	0.00	0.75
8/15/2021	ARP report	0.50			0.50	0.00	0.50
8/16/2021	C&I custom impact	0.25			0.25	0.00	0.25
8/20/2021	RNC baseline study	0.25			0.25	0.00	0.25
8/24/2021	res appl NTG issue from Tony; mtg prep; RNC baseline study	0.25			0.25	0.00	0.25
8/25/2021	res studies call; RNC baseline study; RPP NTG issue	2.00			2.00	0.00	2.00
8/26/2021	appl NTG issue	0.50			0.50	0.00	0.50
8/27/2021	RPP NTG	0.25			0.25	0.00	0.25
8/30/2021	solar inverter study	0.25			0.25	0.00	0.25
8/31/2021	solar inverter; prep for C&I studies call	1.00			1.00	0.00	1.00
							0.00
	Total □ours	17.50	0.00	0.00	17.50	0.00	17.50
	Total Amount	\$3,465.00	\$0.00	\$0.00	\$3,465.00	0.00	\$3,465.00

Pay to: Jennifer Chiodo
JLC Consulting, LLC
52 Bent Creek Road
Hinesburg, VT 05460

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-2021.05*
Invoice Date: *August 31, 2021*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 8/1/21 through 8/31/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	6.25	\$198.00	\$1,237.50
LABOR - Travel Hours	0.00	\$99.00	\$0.00
(See attached for breakdown by EEAC Team/Task and description of services.)			
Travel Expenses			\$0.00
(See attached travel expense form for details.)			
TOTAL DUE			<u>\$1,237.50</u>

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
8/9/21	Quantify impacts of comments on plan			2.25			2.25	0.00	2.25
8/10/2021	Quantify impacts of comments on plan			2.00			2.00	0.00	2.00
8/10/2021	NTG and ISP for NCP call			0.75			0.75	0.00	0.75
8/11/2021	RI status review with OEI team			0.25			0.25	0.00	0.25
8/18/2021	Review and comment on data report			1.00			1.00	0.00	1.00
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	6.25	0.00	0.00	6.25	0.00	6.25
	Total Amount	\$0.00	\$0.00	\$1,237.50	\$0.00	\$0.00	\$1,237.50	0.00	\$1,237.50

Rachel Sholly Energy Consulting
48 Hudson St. Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 44
Invoice Date: August 31, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 08/01/21 through 08/31/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	14.25	\$155.00	\$2,208.75
LABOR - Travel Hours	0.00	\$77.50	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$2,208.75</u>

Racel Solly Energy Consulting
Services Performed 08/01/21 through 08/31/21

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
08/03/21	Scheduling & prep for edu mtg	1.00					1.00	0.00	1.00
08/04/21	Edu prep, mtg & follow-up	2.50					2.50	0.00	2.50
08/05/21	Optimal weekly scrum	0.50					0.50	0.00	0.50
08/10/21	8-12 workshop planning; Communications re: edu contracts	0.50					0.50	0.00	0.50
08/12/21	Drafted NEEP memo; Optimal weekly scrum	2.00					2.00	0.00	2.00
08/16/21	Event planning mtg prep; Sent last year files to D&S; Event planning mtg	1.50					1.50	0.00	1.50
08/18/21	EERMC mtg prep	0.50					0.50	0.00	0.50
08/19/21	Mtg w/OER - Council prep & staff transition; EERMC mtg	3.00					3.00	0.00	3.00
08/21/21	Posted 8/2 report & updated meeting descriptions on website	0.25					0.25	0.00	0.25
08/25/21	Event planning check-in	1.00					1.00	0.00	1.00
08/31/21	Check-in w/Mike; EERMC budget analysis; Prep for edu call	1.50					1.50	0.00	1.50
	Total hours	18.25	0.00	0.00	0.00	0.00	18.25	0.00	18.25
	Total Amount	\$2,201.75	\$0.00	\$0.00	\$0.00	\$0.00	\$2,201.75	0.00	\$2,201.75

Invoice



September 30, 2021
Project No: 7395
Invoice No: 7248

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Matthew Ray
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2021

Professional Services from September 1, 2021 to September 30, 2021

Phase 001 EERMC Oversight

Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	.50	135.00	67.50	
Guerard, Michael	33.50	198.00	6,633.00	
Johnson, Craig	17.75	186.00	3,301.50	
McDonald, Clifford	13.75	198.00	2,722.50	
Totals	65.50		12,724.50	
Total Labor				12,724.50

Subcontractors

Rachel Sholly			3,642.50	
EcoMetric Consulting, LLC			3,152.50	
Total Subcontractors			6,795.00	6,795.00

Total this Phase \$19,519.50

Phase 002 Dev of Work Products & Rep. of EERMC

Optimal Staff

	Hours	Rate	Amount	
Belliveau, Eric	3.75	212.00	795.00	
Caesar, Adrian	.25	135.00	33.75	
Guerard, Michael	2.25	198.00	445.50	
Ross, Samuel	38.75	186.00	7,207.50	
Totals	45.00		8,481.75	
Total Labor				8,481.75

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021	Invoice	7248
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Subcontractors

Core Energy Insights Inc.	186.00		
Total Subcontractors	186.00	186.00	
		Total this Phase	\$8,667.75

Phase	003	EE & System Reliab. Prog. Design & Deliv
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Optimal Staff

	Hours	Rate	Amount
Caesar, Adrian	53.25	135.00	7,188.75
Guerard, Michael	21.25	198.00	4,207.50
Jacobs, Adam	16.00	186.00	2,976.00
Johnson, Craig	56.50	186.00	10,509.00
Mosenthal, Philip	1.50	212.00	318.00
Ross, Samuel	41.25	186.00	7,672.50
Totals	189.75		32,871.75
Total Labor			32,871.75

Subcontractors

Jennifer Chiodo	792.00		
Energy Futures Group, Inc.	2,623.50		
Total Subcontractors	3,415.50	3,415.50	
		Total this Phase	\$36,287.25

Phase	004	Adv Integ Approaches & Emerging Issues
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Optimal Staff

	Hours	Rate	Amount
Guerard, Michael	.50	198.00	99.00
Totals	.50		99.00
Total Labor			99.00
		Total this Phase	\$99.00

Billing Limits

	Current	Prior	To-Date
Total Billings	64,573.50	485,524.50	550,098.00
Limit			631,263.00
Remaining			81,165.00
		Total this Invoice	\$64,573.50

Billings to Date

	Current	Prior	Total
Labor	54,177.00	373,239.25	427,416.25
Subcontractor	10,396.50	112,285.25	122,681.75
Totals	64,573.50	485,524.50	550,098.00

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021	Invoice	7248
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Project 7395 Rhode Island EERMC - 2021 Invoice 7248

Billing Backup

Friday, November 12, 2021

Optimal Energy Inc.

Invoice 7248 Dated 9/30/2021

11:20:08 AM

Phase 001 EERMC Oversight

Optimal Staff

		Hours	Rate	Amount
Caesar, Adrian	9/17/2021	.50	135.00	67.50
	September EERMC Mtg. Materials review and upload			
Guerard, Michael	9/1/2021	1.75	198.00	346.50
	Chk-in call w Marisa; coordinate 1-1 mtgs w OER, members, C-team			
Guerard, Michael	9/3/2021	1.00	198.00	198.00
	Discussion w OER, Marisa on vote language, prep			
Guerard, Michael	9/8/2021	.50	198.00	99.00
	Review Aug-Sept gannt updates from NC/OER			
Guerard, Michael	9/10/2021	2.25	198.00	445.50
	Prep for 9/16 EERMC mtg, coord 1-1s			
Guerard, Michael	9/13/2021	3.00	198.00	594.00
	EERMC mtg prep w team, OER; develop materials			
Guerard, Michael	9/14/2021	4.50	198.00	891.00
	EERMC mtg prep w team, OER; finalize materials; chk-in w Grid/OER; review update from Marisa on procedural options			
Guerard, Michael	9/15/2021	2.75	198.00	544.50
	1-1 mtg w S. AnderBois; EERMC mtg prep			
Guerard, Michael	9/16/2021	2.75	198.00	544.50
	1-1 mtg w P. Case; EERMC mtg prep and debriefs; update C-E report			
Guerard, Michael	9/17/2021	6.00	198.00	1,188.00
	EERMC mtg follow-up, tasks -- memo and C-E report content - and next steps mapping and team coord.			
Guerard, Michael	9/20/2021	1.50	198.00	297.00
	Respond to N.Ucci/OER request; EERMC mtg prep			
Guerard, Michael	9/21/2021	1.25	198.00	247.50
	Respond to P.Case email; send updated SOW to NC/OER			
Guerard, Michael	9/22/2021	2.25	198.00	445.50
	1-1 mtg w P. Case; EERMC mtg coord w team			
Guerard, Michael	9/23/2021	3.00	198.00	594.00
	EERMC mtg prep, team coord, debrief; monitor vote language mods from Marisa			
Guerard, Michael	9/24/2021	1.00	198.00	198.00
	TWG mtg; follow-up tasks from EERMC meeting			
Johnson, Craig	9/13/2021	1.50	186.00	279.00
	Develop content for Council memo and presentation.			
Johnson, Craig	9/14/2021	6.50	186.00	1,209.00
	Develop content for Council meeting, including review of final draft memo and associated presentation. Internal discussions and review/iteration of content. Develop talking points for res slides.			

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Page 4

Project	7395	Rhode Island EERMC - 2021			Invoice	7248
Johnson, Craig		9/15/2021	3.25	186.00		604.50
		Develop content for C-E Report and Final Draft Review presentations for 9/23 Council meeting.				
Johnson, Craig		9/20/2021	1.25	186.00		232.50
		Review meeting notes from 9/16 Council meeting. Review meeting materials for 9/23 Council meeting.				
Johnson, Craig		9/21/2021	.25	186.00		46.50
		Check-in w/ internal team on outcome from last week's Council meeting and prep needed for this week's Council meeting.				
Johnson, Craig		9/22/2021	.50	186.00		93.00
		EERMC Prep meeting w/ OER and EERMC Counsel. Prep for Council meeting.				
Johnson, Craig		9/23/2021	4.25	186.00		790.50
		Council meeting. Prep for Council meeting.				
Johnson, Craig		9/27/2021	.25	186.00		46.50
		Respond to e-mails re: C-Team seats at Council meeting.				
McDonald, Clifford		9/3/2021	.50	198.00		99.00
		rate and bill impacts model check-in				
McDonald, Clifford		9/9/2021	3.00	198.00		594.00
		Bill and rate impact reievew				
McDonald, Clifford		9/10/2021	4.25	198.00		841.50
		Electric and gas rate and bill impact tool review				
McDonald, Clifford		9/13/2021	2.00	198.00		396.00
		Discuss rate and bill impact findings				
McDonald, Clifford		9/17/2021	1.50	198.00		297.00
		rate and bill impact - finalize and send out memo				
McDonald, Clifford		9/20/2021	2.50	198.00		495.00
		RI rate analysis review, call, and notes				
		Totals	65.50			12,724.50
		Total Labor				12,724.50
					Total this Phase	\$19,519.50

Phase	002	Dev of Work Products & Rep. of EERMC			
Optimal Staff					
			Hours	Rate	Amount
Belliveau, Eric		9/3/2021	1.25	212.00	265.00
		team check in, disc with MG on coverage of upcoming Grid plan elements			
Belliveau, Eric		9/10/2021	1.50	212.00	318.00
		team leads check in call, project management dicussion, discuss Grid plan and issues			
Belliveau, Eric		9/24/2021	1.00	212.00	212.00
		check in call, disc plan options and result of EERMC vote follow up			
Caesar, Adrian		9/23/2021	.25	135.00	33.75
		September EERMC mtg materials finalization			
Guerard, Michael		9/1/2021	.75	198.00	148.50
		Education subgroup - agenda review, debrief			

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Project	7395	Rhode Island EERMC - 2021		Invoice	7248
Guerard, Michael		9/2/2021	.50	198.00	99.00
		Reviw Education group communications on POs and next steps			
Guerard, Michael		9/15/2021	1.00	198.00	198.00
		Review EERMC Educ grp materials; updates w team			
Ross, Samuel		9/1/2021	3.50	186.00	651.00
		2022 Plan review coord; r&b model review prep; plan review prep corresp w/other stakeholders			
Ross, Samuel		9/2/2021	.50	186.00	93.00
		RI Budget remaining balance review and corresp.			
Ross, Samuel		9/3/2021	2.00	186.00	372.00
		rate and bill impacts initial review disc with CM; coord re: 1-on-1 mtgs; internal EM&V budget check in			
Ross, Samuel		9/13/2021	7.00	186.00	1,302.00
		2022 Plan internal check in, corresp re: same; OER/DPUC check in; rate and bill impacts analysis findings review; initial work on 2022 findings memo for special EERMC mtg			
Ross, Samuel		9/14/2021	8.25	186.00	1,534.50
		continued work on 2022 Plan memo; 1-on-1 with Council Members Teichert and Hubbard, prep re: same; check in with OER/Grid; 2022 full text review; initial work on 2022 plan presentation for special meeting			
Ross, Samuel		9/15/2021	3.75	186.00	697.50
		continued 2022 Plan text review; SRP TWG; solar PFC study discussion; RI contract intern disc. w/URI			
Ross, Samuel		9/16/2021	9.50	186.00	1,767.00
		prep draft of CE report for 9/23 mtg; 1-on-1 check in with Council member gill case, initial work regarding other needed Council materials for 9/23; 9/16 Council meeting; further work re: 9/23 Council materials			
Ross, Samuel		9/17/2021	4.25	186.00	790.50
		continued work on 9/23 mtg materials, internal discussions and finalization of same			
		Totals	45.00		8,481.75
		Total Labor			8,481.75
				Total this Phase	\$8,667.75

Phase	003	EE & System Reliab. Prog. Design & Deliv			
Optimal Staff					
			Hours	Rate	Amount
Caesar, Adrian		9/1/2021	.25	135.00	33.75
		Monthly RI Program data sharing reminders			
Caesar, Adrian		9/2/2021	3.50	135.00	472.50
		September Res and C&I sector team calls prep, notetaking, and follow ups			
Caesar, Adrian		9/3/2021	.75	135.00	101.25
		Weekly RI leads check-in re: preparation for upcoming 2022 BC model updates, rate and bill impact model analysis, EERMC guidance on 2022 plan and corresponding analyses			
Caesar, Adrian		9/7/2021	.25	135.00	33.75
		2022 AP second draft review/analysis prep mtg.			

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Project	7395	Rhode Island EERMC - 2021			Invoice	7248
Caesar, Adrian		9/8/2021	4.25	135.00		573.75
		2022 AP second draft analysis prep - Program-level comps, BC MPS mapping tool, lifetime CTA comps - NGrid RI/MA, Delivered fuel customer "pocketbook" bill impacts				
Caesar, Adrian		9/9/2021	5.75	135.00		776.25
		2022 AP second draft and EERMC mtg deliverables discussion - CE report, rate/bill impact model analysis, Plan draft qualitative and quantitative comps, cost efficiency and CTA comps, updated BCR model, Main Text, and Plan attachments review, Custom C&I savings by end use and SBC 2021-2022 deltas, Plan attachment 5/6 table and BC model data comps				
Caesar, Adrian		9/10/2021	5.00	135.00		675.00
		Weekly RI leads check-in, status updates/planning for 2022 AP second draft analysis and Council memo development, CTeam plan comments catalog check for comment integration into second Plan draft, EW SF cost to achieve analysis, 2022 AP cost effectiveness/MA comps				
Caesar, Adrian		9/13/2021	2.75	135.00		371.25
		2022 Annual Plan check-in, status updates for 2022 AP second draft analysis and Council memo development, CTeam plan comments catalog check for comment integration into second Plan draft, EW SF cost to achieve analysis, 2022 AP cost effectiveness/MA comps, additional proposed savings/targets/AP 2nd draft comps				
Caesar, Adrian		9/14/2021	4.25	135.00		573.75
		Internal check-in re: rate and bill impact analysis and computational errors, EERMC memo and powerpoint finalization, Savings trend deltas analysis - 2022 targets, 3YPs, and AP drafts				
Caesar, Adrian		9/15/2021	5.00	135.00		675.00
		September EERMC Mtg and special mtg prep, 2022 EE plan final draft presentation discussion and development, 2022 AP BCR model, narrative, and plan attachment cross-checks, updated RI TRM DB and BCR model QA checks, TRM database and BCR model measure mapping				
Caesar, Adrian		9/16/2021	4.75	135.00		641.25
		September special EERMC mtg prep, 2022 AP plan draft costs, savings, and CTA deltas, Sector/program changes across plan drafts, EW SF electric cost analysis, EE targets, 3YP, and AP trend analysis, September Special EERMC mtg				
Caesar, Adrian		9/17/2021	7.00	135.00		945.00
		September EERMC mtg prep - special mtg debrief and Sep mtg planning w/OER, 2022 Plan recommendation memo and presentation development				
Caesar, Adrian		9/21/2021	3.50	135.00		472.50
		August C&I/Res raw data review and data report development				
Caesar, Adrian		9/23/2021	3.50	135.00		472.50
		Sep EERMC mtg. prep - annual plan updates, vote options, justification for non-endorsement of Plan, PUC order on 3YP budget, September EERMC mtg/notetaking/travel, next steps for EERMC support on 2022 AP -				
Caesar, Adrian		9/24/2021	.25	135.00		33.75
		Internal check-in re: EERMC mtg follow up, EERMC non-endorsement justification and C-Team Plan comments development,				
Caesar, Adrian		9/27/2021	.50	135.00		67.50
		Internal check-in re: Council Planning topics gantt chart/tracker				
Caesar, Adrian		9/30/2021	2.00	135.00		270.00
		Council Planning topics gantt chart/tracker based on 2021-2023 3YP and 2022 AP Council meeting discussion and materials				

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Project	7395	Rhode Island EERMC - 2021			Invoice	7248
Guerard, Michael		9/1/2021	2.25	198.00		445.50
		Team prep for 2022 Plan review; review CI EMV tracker and mtg notes				
Guerard, Michael		9/2/2021	2.75	198.00		544.50
		Rez and CI monthly sector mtgs, prep and debriefs				
Guerard, Michael		9/3/2021	1.75	198.00		346.50
		Team discussion on processing 2022 plan, review materials				
Guerard, Michael		9/8/2021	1.75	198.00		346.50
		Review Division's 3rd set of IRs on CHP; preliminary review, coordination of 2022 EEPP				
Guerard, Michael		9/9/2021	4.50	198.00		891.00
		Plan review; coord w Team				
Guerard, Michael		9/10/2021	4.75	198.00		940.50
		Ongoing Plan review; coord w Team				
Guerard, Michael		9/15/2021	1.25	198.00		247.50
		Review EEPP comments from subs; SRP mtg debrief				
Guerard, Michael		9/21/2021	1.50	198.00		297.00
		Prelim review of PUC's written order on 3YP; review Res EMV tracker				
Guerard, Michael		9/23/2021	.50	198.00		99.00
		Review set 3 of Grid's DR response to PUC on CHP				
Guerard, Michael		9/28/2021	.25	198.00		49.50
		Review Grid notification to PUC on Budget overspend				
Jacobs, Adam		9/1/2021	1.00	186.00		186.00
		-review custom electric impact evaluation draft results -RI EE/Restaurants & Grocery stores call w/ Sue + NGrid				
Jacobs, Adam		9/2/2021	1.25	186.00		232.50
		-TLED incentive support phase-out -RI monthly C&I sector team call				
Jacobs, Adam		9/3/2021	1.25	186.00		232.50
		-RI leads check-in -review notes and send out follow-ups from Sept C&I sector team call				
Jacobs, Adam		9/8/2021	1.25	186.00		232.50
		-provide Ben Rivers feedback on TLED BCR -RI daily scrum/planning check-in -check-in w/ Jen on planning next steps				
Jacobs, Adam		9/9/2021	3.00	186.00		558.00
		-share attachment 2 update w/ Jen for review of RCx sections -share attachment 2 update w/ Dan for review of lighting sections -review final draft plan narrative attachment 2 for responsiveness to comments -check-in w/ Craig on plan review next steps -check-in w/ Adrian on updated BCR model data and MPS mapping tool				
Jacobs, Adam		9/10/2021	2.00	186.00		372.00
		-RI leads check-in -finish attachment 2 narrative response to C-team comments -BCR draft vs. final comparisons analysis (incentives, gross annual kWh, net lifetime kWh + key takeaways)				
Jacobs, Adam		9/13/2021	2.25	186.00		418.50
		-brief implementation update to Craig -draft vs. final plan C&I gas BCR analysis by measure/end use -RI 2022 plan check-in call -draft C&I summary language for memo to EERMC on final Grid plan				
Jacobs, Adam		9/14/2021	1.00	186.00		186.00

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Project	7395	Rhode Island EERMC - 2021			Invoice	7248
		-follow-up w/ EFG on C&I performance lighting in final draft plan -RI daily scrum planning + review of final plan memo -check-in w/ Craig on				
Jacobs, Adam		9/15/2021	.50	186.00		93.00
		-daily scrum/planning -notes for C&I slides in EERMC presentation -send Sam notes from NGrid call w/ Sue RE: grocer and food service initiatives				
Jacobs, Adam		9/17/2021	.50	186.00		93.00
		-RI leads check-in and follow-up on EERMC meeting -review EERMC Special Meeting Notes September 16, 2021				
Jacobs, Adam		9/21/2021	.50	186.00		93.00
		-RI daily scrum/check-in on planning and Thurs council meeting				
Jacobs, Adam		9/24/2021	.50	186.00		93.00
		-RI leads check-in call -review RI council materials from NGrid and debrief on meeting				
Jacobs, Adam		9/28/2021	.50	186.00		93.00
		-RI daily scrum				
Jacobs, Adam		9/29/2021	.50	186.00		93.00
		-RI daily scrum and check-in on planning				
Johnson, Craig		9/1/2021	3.00	186.00		558.00
		Monthly check-in w/ Richard. Internal check-in meeting w/ Sam, Mike, and Adrian. Discussed process and next steps for 2022 Plan review and prep for final draft plan review. Prep for Residential sector team meeting.				
Johnson, Craig		9/2/2021	3.25	186.00		604.50
		Internal check-in with team on upcoming sector team meetings and plan review processes. Residential sector team meeting and associated meeting prep and debrief.				
Johnson, Craig		9/3/2021	1.50	186.00		279.00
		RI Team leads check-in. Brief discussion on sector team meetings, and larger discussion around 2022 Plan and final draft plan review. Res sector team meeting debrief. Send out meeting follow-ups.				
Johnson, Craig		9/7/2021	.50	186.00		93.00
		Morning check-in w/ Adrian and Mike. Discussed critical path schedule for final draft plan review.				
Johnson, Craig		9/8/2021	3.75	186.00		697.50
		Morning check-in w/ Adam and Adrian. Discussed a variety of plan review items that need to be completed. Began prep work on data analysis with Adrian. Compile all C-Team comments on first draft narrative into matrices to assist in review of final plan.				
Johnson, Craig		9/9/2021	6.50	186.00		1,209.00
		Distribute final draft of 2022 plan to internal team for review. Reach out to Grid to ask about timing on BC models. Check-in w/ internal team about process and next steps for various plan review tasks including narrative and BC model review. Review residential narrative and redlines.				
Johnson, Craig		9/12/2021	5.75	186.00		1,069.50
		Final draft plan review. Review residential section of plan. Review BC Models to ID what drove major savings and spending changes between drafts. Develop delivered fuels pocketbook analysis.				
Johnson, Craig		9/13/2021	5.50	186.00		1,023.00

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Project	7395	Rhode Island EERMC - 2021			Invoice	7248
		2022 Plan Review - check-in w/ internal team about key work areas and next steps. Review EW SF cost to achieve, compare changes in non-incentive cost categories across plans, highlight key issues in residential attachment, review and ID reasons for changes in savings and spending in residential programs in BC models. Bi-Weekly check-in w/ OER and the Division.				
Johnson, Craig		9/14/2021	2.50	186.00		465.00
		2022 Plan Review - Review comments from Glenn, Margie, and Richard on Residential attachment. Review and respond to Sam's comments on delivered fuels pocketbook analysis.				
Johnson, Craig		9/15/2021	1.75	186.00		325.50
		Check-in with internal team on plan review work needed to be completed for 9/23 Council meeting. Update graphics for C-E Report.				
Johnson, Craig		9/20/2021	.25	186.00		46.50
		Send update on 2022 Plan to subs.				
Johnson, Craig		9/21/2021	1.75	186.00		325.50
		Check-in w/ internal team on final draft of Plan and next steps for Council vote. Review PUC Order on 2021 and 2021-2023 Plan, discussion/emails w/ team about the same.				
Johnson, Craig		9/22/2021	.75	186.00		139.50
		Discuss PUC Order and discuss strategy for Council vote with internal team.				
Johnson, Craig		9/24/2021	6.50	186.00		1,209.00
		EE TWG meeting. Debrief with internal team from Council meeting and EE TWG meeting. Review notes from Council meeting and develop summaries of why Councilors did not endorse the Plan. Review August Res Data report. Submit questions to National Grid.				
Johnson, Craig		9/27/2021	1.00	186.00		186.00
		Check-in w/ Laura, Mike R., and Dave M. on IES follow-up items from last res sector team meeting. Meeting debrief.				
Johnson, Craig		9/28/2021	4.50	186.00		837.00
		Check in with internal team on planning for upcoming sector team meetings, and next steps following Council's vote to not endorse plan. Working on memo for Council's decision to not endorse.				
Johnson, Craig		9/29/2021	4.00	186.00		744.00
		Review and discuss memo on Council's decision to not endorse plan with internal team. Continued work on memo.				
Johnson, Craig		9/30/2021	3.75	186.00		697.50
		Res Sector Team Meeting - review follow-ups from September meeting and draft Agenda for October meeting. Associated meeting prep. Check-in with internal team on memo for Council's decision to not endorse plan. Check-in call w/ Laura and Mike R. to discuss expanded IES data set. Brainstorm ways to use additional data in future data reports.				
Mosenthal, Philip		9/8/2021	1.50	212.00		318.00
		rev. Residential New Construction/codes & standards EMV workplan, conf. re same				
Ross, Samuel		9/1/2021	2.25	186.00		418.50
		C&I EMV montlyh mtg, prep & follow up; RI team coord				
Ross, Samuel		9/2/2021	1.00	186.00		186.00
		Gas DR correspondence; EM&V corresp; EM&V internal coord				
Ross, Samuel		9/3/2021	1.00	186.00		186.00
		fnialize solar PFC comments, LCP law mtg				
Ross, Samuel		9/20/2021	3.00	186.00		558.00

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Project	7395	Rhode Island EERMC - 2021			Invoice	7248
		rate and bill impacts mtg w/NGrid and OER, prep and follow up re: same; dev and dsitribute res EM&V agenda; SRP upcoming topics corresp; email response to N. Ucci re: upcoming EERMC mtg prep				
Ross, Samuel		9/21/2021	5.75	186.00		1,069.50
		RI 2020 custom studies sampling approach mtg; initial prep for 9/22 mtg re: 9/23 Council mtg; PUC written order review and internal disc				
Ross, Samuel		9/22/2021	6.25	186.00		1,162.50
		Res EM&V monthly mtg; mtg w/OER re: 9/23 mtg, prep and follow-up re: same; 1-on-1 mtg with Council member Gill Case, prep and follow up re: same; Rate and bill impacts memo writing and distribution				
Ross, Samuel		9/23/2021	6.50	186.00		1,209.00
		EERMC meeting; prep & follow up re: same; prep mtg with Chairperson Hubbard, prep & follow-up re: same; internal disc: re: talking points, vote options, CHP project, and procedural next steps; corresp. with Council Member Gill Gase				
Ross, Samuel		9/24/2021	4.25	186.00		790.50
		CE report updated and shared; EE TWG mtg, prep and follow up re: same; internal debrief on EERMC mtg; follow up on reasons for Council vote (minutes); review and share DPUC CHP finding; connecting w/DPUC re: rate and bill impact Qs raised during plan review; corresp. re: various EM&V study next steps, distributing docs for review				
Ross, Samuel		9/27/2021	3.75	186.00		697.50
		OER/DPUC check in; MF and participant study comments finalized; corresp re: EERMC meeting procedures per Council member AnderBois inquiry; rate and bill impacts follow up corresp. to NGrid; disc w/AC re: mapping of historical meeting topics				
Ross, Samuel		9/28/2021	3.00	186.00		558.00
		Review and edit draft memo summarizing Council vote reasoning; CTeam Grid OER check in; prep and follow up re: same; corresp re: CHP proj; MF census study comments sent to NGrid; coord re: next steps on reasons and comments memo				
Ross, Samuel		9/29/2021	2.75	186.00		511.50
		corresp re: BC models for provisional plan; CTeam comments on NP cust survey sent to NGrid				
Ross, Samuel		9/30/2021	1.75	186.00		325.50
		plannign re: next steps to prep for filing; provisional plan review; needed Council materials; corresp re: rate and bill next steps; SRP scheduling				
		Totals	189.75			32,871.75
		Total Labor				32,871.75
					Total this Phase	\$36,287.25

Phase	004	Adv Integ Approaches & Emerging Issues		
Optimal Staff				
		Hours	Rate	Amount
Guerard, Michael	9/1/2021	.50	198.00	99.00
		Review docket 4770 communications to/from PUC		
		Totals	.50	99.00
		Total Labor		99.00

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Project	7395	Rhode Island EERMC - 2021	Invoice	7248
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Total this Phase **\$99.00**

Total this Project **\$64,573.50**

Total this Report **\$64,573.50**



EcoMetric Consulting, LLC
555 Exton Cms
Exton, PA 19341
610.400.8600
admin@ecometricconsulting.com

INVOICE

BILLED TO

Mike Guerard
Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

TOTAL DUE

\$3,152.50

Project Name RI EEMRC Consultant
Project # 7395
Invoice # 1029-P9-21
Billing Period 08/28/2021 - 10/01/2021

Invoice Date 09/30/2021
Due Date 10/30/2021
Payment Terms Net 30

Task Number	Description	Amount
Task 1	EM&V Oversight	\$3,152.50
Task 2	Program Design & Policy	\$0.00

Subtotal	\$3,152.50
Invoice Total	\$3,152.50

Invoice Number 1029-P9-21
Period 08/28/2021 - 10/01/2021

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	EM&V Oversight	Salil Gogte	Partner	2021-09	0.5	\$ 212.00	\$ 106.00
RI EEMRC Consultant	EM&V Oversight	Michael Frischmann	Partner	2021-09	0	\$ 212.00	\$ -
RI EEMRC Consultant	EM&V Oversight	Michael Honeychuck	Managing Consultant	2021-09	11.75	\$ 198.00	\$ 2,326.50
RI EEMRC Consultant	EM&V Oversight	Bitul Sinha	Sr Engineer	2021-09	4.5	\$ 160.00	\$ 720.00
RI EEMRC Consultant	EM&V Oversight	Divya Prasanna	Project Coordinator	2021-09	0	\$ -	\$ -
Total					16.75		\$ 3,152.50

		Paste in timesheet extract here					
Full Name	Task	fname	lname	local_date	hours	task	notes
Salil Gogte	EM&V Oversight	Salil	Gogte	9/7/2021	0.5	EM&V Oversight	Budget management
							Monthly C&I call with C-Team & National Grid Solar PFC memo review & discussion with Bitul
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	9/1/2021	1.75	EM&V Oversight	Emails with Sam & C-Team
							Monthly check-in with Sam Solar PFC memo review & summary writeup
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	9/2/2021	1.75	EM&V Oversight	Emails with Sam & C-Team
							Emails & prep for solar PFC call with National Grid
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	9/13/2021	0.75	EM&V Oversight	Weekly check-in
							Solar PFC call with National Grid & prep
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	9/15/2021	1.25	EM&V Oversight	Call with Bitul to discuss solar PFC updates
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	9/16/2021	0.5	EM&V Oversight	Participation & MF study review & comments
							Monthly residential call with National Grid
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	9/22/2021	1.25	EM&V Oversight	Review of participation/MF study, comments & emails
							Emails & call with Bitul about solar PFC updates
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	9/23/2021	1.5	EM&V Oversight	Review of participation/MF study, comments & emails
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	9/27/2021	0.5	EM&V Oversight	Emails & planning for upcoming study reviews
							Non-participant survey review & comments
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	9/29/2021	1.25	EM&V Oversight	Emails with Sam & C-Team
							Participation & MF study review & comments
Michael Honeychuck	EM&V Oversight	Michael	Honeychuck	9/30/2021	1.25	EM&V Oversight	Emails with Sam & C-Team
							Reviewing the NG Solar PFC Savings Verification Memo
Bitul Sinha	EM&V Oversight	Bitul	Sinha	9/1/2021	1.75	EM&V Oversight	NG Solar PFC Discussions w/ Michael Honeychuck and the memo conclusion
							NG Solar PFC Discussions w/ Sam Ross, Michael Honeychuck
Bitul Sinha	EM&V Oversight	Bitul	Sinha	9/2/2021	0.75	EM&V Oversight	Discussion about NG Solar PFC study and implication of the results
							Solar PFC memo Discussion w/ Mike
Bitul Sinha	EM&V Oversight	Bitul	Sinha	9/13/2021	0.25	EM&V Oversight	Provide Comments on Memo to Mike
Bitul Sinha	EM&V Oversight	Bitul	Sinha	9/15/2021	0.75	EM&V Oversight	National Grid Solar PFC Demonstration (C-team discussion with National Grid)
Bitul Sinha	EM&V Oversight	Bitul	Sinha	9/21/2021	0.25	EM&V Oversight	Staff meeting - Update to the team
Bitul Sinha	EM&V Oversight	Bitul	Sinha	9/23/2021	0.75	EM&V Oversight	Solar PFC Inverter Memo discussion w/ Mike and Comments

Energy Futures Group, Inc.
PO Box 587
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 4853
Invoice Date: September 30, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 9/1/2021 through 9/30/2021			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	13.25	\$198.00	\$2,623.50
LABOR - Intern Hours	0.00	\$50.00	\$0.00
LABOR - Travel Hours	0.00	\$99.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$2,623.50</u>

Energy Futures Group, Inc.
Services Performed 01/2021 through 03/2021

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
9/1/2021	Review and provide comments on Performance Lighting Plus and Lighting Design Incentive programs			2.50			2.50	0.00	2.50
9/1/2021	Check in with Craig			0.50			0.50	0.00	0.50
9/7/2021	Meeting coordination with Ben Rivers			0.25			0.25	0.00	0.25
9/9/2021	Review plan comments from NGrid			0.50			0.50	0.00	0.50
9/12/2021	Review of 2022 Plan documents			0.25			0.25	0.00	0.25
9/13/2021	Review draft 2 plan revisions			0.50			0.50	0.00	0.50
9/13/2021	Review of 2022 Plan documents			1.25			1.25	0.00	1.25
9/14/2021	Review performance lighting revisions in draft 2			0.50			0.50	0.00	0.50
9/14/2021	Review of 2022 Products and HVAC programs			1.50			1.50	0.00	1.50
9/14/2021	RI Plan review and send out			1.50			1.50	0.00	1.50
9/27/2021	Lighting info sharing from NUL			0.50			0.50	0.00	0.50
9/29/2021	Review and comment on draft NP survey			1.25			1.25	0.00	1.25
9/30/2021	Review Participation Analysis memo			2.25			2.25	0.00	2.25
							0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	13.25	0.00	0.00	13.25	0.00	13.25
	Total Amount	\$0.00	\$0.00	\$2,623.50	\$0.00	\$0.00	\$2,623.50	0.00	\$2,623.50

Margie Lynch/Core Energy Insights, Inc.
4445 E. Hoback River Road, Jackson, WY 83001

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 9-2021*
Invoice Date: *September 30, 2021*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services	Amount
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Services Performed 09/01/2021 through 09/30/2021

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	1.00	\$186.00	\$186.00

TOTAL DUE

\$186.00

Margie Lync Core Energy Insights, Inc.

Services Performed 01/01/2021 through 01/30/2021

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
9/13/21	Reviewed revised plan		1.00				1.00	0.00	1.00
							0.00	0.00	0.00
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	1.00	0.00	0.00	0.00	1.00	0.00	1.00
	Total Amount	\$0.00	\$16.00	\$0.00	\$0.00	\$0.00	\$16.00	0.00	\$16.00

Pay to: Jennifer Chiodo
JLC Consulting, LLC
52 Bent Creek Road
Hinesburg, VT 05460

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *R-2021.06*
Invoice Date: *September 30, 2021*
OEI Project #: *7345*

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 9/1/21 through 9/30/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	4.00	\$198.00	\$792.00
LABOR - Travel Hours	0.00	\$99.00	\$0.00
(See attached for breakdown by EEAC Team/Task and description of services.)			
Travel Expenses			\$0.00
(See attached travel expense form for details.)			
TOTAL DUE			<u>\$702.00</u>

Pay to Jennifer Ciodo

Services Performed 1/21 through 3/30/21

Date	Description of Services	001 - Policy Strategy	002- Cyclical Planning Reporting Activities	003 - EERMC Oversight	004 - EERMC Oversight Education Stakeholders	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
9/8/21	Team planning call			0.25			0.25	0.00	0.25
9/10/2021	Draft plan review and comment			3.75			3.75	0.00	3.75
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	4.00	0.00	0.00	4.00	0.00	4.00
	Total Amount	\$0.00	\$0.00	\$72.00	\$0.00	\$0.00	\$72.00	0.00	\$72.00

Rachel Sholly Energy Consulting
48 Hudson St. Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 45
Invoice Date: September 30, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 09/01/21 through 09/30/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	23.50	\$155.00	\$3,642.50
LABOR - Travel Hours	0.00	\$77.50	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$3,642.50</u>

Racel Solly Energy Consulting
Services Performed 09/01/21 through 09/30/21

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
09/01/21	Edu call	1.25					1.25	0.00	1.25
09/02/21	Optimal weekly scrum	0.50					0.50	0.00	0.50
09/07/21	Reviewed D&S docs, sent feedback; Finalized & sent 9/1 notes; Created special Sept mtg on website	1.00					1.00	0.00	1.00
09/09/21	Optimal weekly scrum; Posted 9/16 agenda; Uploaded 2022 Final Draft docs	1.00					1.00	0.00	1.00
09/10/21	Reviewed & commented on 2022 EE Plan final draft	1.25					1.25	0.00	1.25
09/13/21	Reviewed & commented on 2022 EE Plan final draft	1.50					1.50	0.00	1.50
09/14/21	Posted Council mtg materials	0.25					0.25	0.00	0.25
09/15/21	Education call & follow-up	1.75					1.75	0.00	1.75
09/16/21	Optimal weekly scrum; Looped Adrian in on videos work; EERMC mtg	3.75					3.75	0.00	3.75
09/27/21	Videos & events planning; Communications w/Sue & C-team; Edu call scheduling	2.00					2.00	0.00	2.00
09/28/21	Sent all current education materials to Sue; Drafted edu agenda; Check-in scheduling	1.25					1.25	0.00	1.25
09/29/21	Reviewed 12 contract & proposal & events update memo; Edu call prep; Developed edu contract summary spreadsheet; Events planning call & follow-up	5.00					5.00	0.00	5.00
09/30/21	Optimal weekly scrum; Updated & sent TWG memo template; Finalized & sent edu agenda & materials; Updated video spreadsheet; Communicated w/presenters; Drafted NEED workshop email to Council; Other meeting prep	3.00					3.00	0.00	3.00
	Total hours	23.50	0.00	0.00	0.00	0.00	23.50	0.00	23.50
	Total Amount	\$3,625.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,625.00	0.00	\$3,625.00

Invoice



October 31, 2021
Project No: 7395
Invoice No: 7257

Integrated Energy Resources

**10600 Route 116
Suite 3
Hinesburg, VT 05461**

Angela Li
National Grid
300 Erie Blvd. West
Syracuse, NY 13202

Rhode Island EERMC - 2021

Professional Services from October 1, 2021 to October 31, 2021

Phase 001 EERMC Oversight

Optimal Staff

	Hours	Rate	Amount	
Caesar, Adrian	2.00	135.00	270.00	
Johnson, Craig	18.25	186.00	3,394.50	
Johnson, Crystal	2.50	198.00	495.00	
Mosenthal, Philip	.50	212.00	106.00	
Ross, Samuel	21.50	186.00	3,999.00	
Totals	44.75		8,264.50	
Total Labor				8,264.50

Subcontractors

Rachel Sholly	6,238.75
EcoMetric Consulting, LLC	3,217.50
Ralph Prah	5,049.00
Total Subcontractors	14,505.25

Total this Phase \$22,769.75

Phase 002 Dev of Work Products & Rep. of EERMC

Optimal Staff

	Hours	Rate	Amount
Belliveau, Eric	2.00	212.00	424.00
Ross, Samuel	23.00	186.00	4,278.00

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7257
	Socks, Matthew	1.00	198.00	198.00		
	Totals	26.00		4,900.00		
	Total Labor					4,900.00
Subcontractors						
	Core Energy Insights Inc.			93.00		
	Total Subcontractors			93.00		93.00
				Total this Phase		\$4,993.00

Phase	003	EE & System Reliab. Prog. Design & Deliv			
Optimal Staff					
		Hours	Rate	Amount	
	Caesar, Adrian	25.25	135.00	3,408.75	
	Jacobs, Adam	14.50	186.00	2,697.00	
	Johnson, Craig	47.25	186.00	8,788.50	
	Mosenthal, Philip	.50	212.00	106.00	
	Ross, Samuel	30.75	186.00	5,719.50	
	Totals	118.25		20,719.75	
	Total Labor			20,719.75	
Subcontractors					
	Energy Futures Group, Inc.			1,683.00	
	Total Subcontractors			1,683.00	
				Total this Phase	\$22,402.75

Billing Limits	Current	Prior	To-Date	
Total Billings	50,165.50	550,098.00	600,263.50	
Limit			631,263.00	
Remaining			30,999.50	
			Total this Invoice	\$50,165.50

Billings to Date	Current	Prior	Total
Labor	33,884.25	427,416.25	461,300.50
Subcontractor	16,281.25	122,681.75	138,963.00
Totals	50,165.50	550,098.00	600,263.50

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557. Page 2

Project 7395 Rhode Island EERMC - 2021 Invoice 7257

Billing Backup

Friday, November 26, 2021

Optimal Energy Inc.

Invoice 7257 Dated 10/31/2021

3:42:21 PM

Phase 001 EERMC Oversight

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian	10/6/2021		2.00	135.00	270.00
	October EERMC education committee meeting - k12 education training, public forum and lecture planning, educational video series outline development and topic prioritization				
Johnson, Craig	10/7/2021		1.50	186.00	279.00
	Check-in with internal team on Council meeting material needs for 10/14 deadline. Review/respond to Mike/Sam thoughts on PPL sale IR re: increase in gas efficiency.				
Johnson, Craig	10/12/2021		1.00	186.00	186.00
	Outline and develop content for presentation to Council on provisional plan.				
Johnson, Craig	10/13/2021		3.25	186.00	604.50
	TWG Update memo - develop content for EE TWG meetings. Review and provide feedback on education update slide deck for Council meeting. Develop content for presentation to Council on provisional plan.				
Johnson, Craig	10/14/2021		5.75	186.00	1,069.50
	Council meeting materials. Add August SRP TWG notes to TWG update memo and finalize memo. Review edits to, and polish, education update presentation. Review and address Sam comments on provisional plan presentation. Finalize and polish provisional plan presentation. Check-in meeting w/ internal team to discuss Council meeting materials.				
Johnson, Craig	10/18/2021		.25	186.00	46.50
	Respond to Councilor question re: heat pump incentives				
Johnson, Craig	10/20/2021		.75	186.00	139.50
	Council meeting prep - Review slides with internal team.				
Johnson, Craig	10/21/2021		3.00	186.00	558.00
	RI October Council meeting. Meeting coordination/prep with internal team.				
Johnson, Craig	10/26/2021		.25	186.00	46.50
	Check-in w/ internal team on upcoming prep work needed for Council meeting and Council retreat.				
Johnson, Craig	10/28/2021		1.00	186.00	186.00
	Discuss EERMC Council retreat with internal team. Research on program management audits for RI Council.				
Johnson, Craig	10/29/2021		1.50	186.00	279.00
	Research on program management audits. Research on potential candidates for vacant Council seats.				
Johnson, Crystal	10/21/2021		2.25	198.00	445.50
	RI EERMC Meeting				
Johnson, Crystal	10/22/2021		.25	198.00	49.50
	Review EERMC EWG recommendations				
Mosenthal, Philip	10/29/2021		.50	212.00	106.00
	team disc. re PUC hearings and work planning				

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Project	7395	Rhode Island EERMC - 2021			Invoice	7257
Ross, Samuel		10/14/2021	1.00	186.00	186.00	
	PUC Open Meeting					
Ross, Samuel		10/15/2021	1.75	186.00	325.50	
	CHP PUC procedural call, prep and follow up re: same; planning convs and corresp re: balance of month					
Ross, Samuel		10/18/2021	1.50	186.00	279.00	
	corresp w/Councilors, incl. member AnderBois Qs & gill case audit emaisl					
Ross, Samuel		10/20/2021	4.50	186.00	837.00	
	auditing call w/Peter and Nathan, corresp re: same; Revising data request, reviewing additions from rest of team; Council meeting prep					
Ross, Samuel		10/21/2021	6.25	186.00	1,162.50	
	Council meeting; prep & follow up re: same, incl. audit disc w/M. Desautel; complete draft of IRs, share w/OER					
Ross, Samuel		10/22/2021	1.50	186.00	279.00	
	Council meeting debrief & next steps					
Ross, Samuel		10/25/2021	2.00	186.00	372.00	
	Check in w/OER and Div; equity follow up from Council mtg w/Crystal Johnson					
Ross, Samuel		10/26/2021	.50	186.00	93.00	
	mgmt audit follow up w/Peter					
Ross, Samuel		10/27/2021	1.75	186.00	325.50	
	audit next steps; IR response delay request corresp and internal disc;					
Ross, Samuel		10/29/2021	.75	186.00	139.50	
	Invoice review and 2021 task mapping					
	Totals		44.75		8,264.50	
	Total Labor					8,264.50
						Total this Phase
						\$22,769.75

Phase 002 Dev of Work Products & Rep. of EERMC

Optimal Staff

			Hours	Rate	Amount
Belliveau, Eric	10/8/2021	1.00	212.00	212.00	
	team call, project management discussion in support of MG				
Belliveau, Eric	10/15/2021	1.00	212.00	212.00	
	team check in and PM discussion, plan review and decisions.				
Ross, Samuel	10/7/2021	.75	186.00	139.50	
	educational speakers research/brainstorm, sub invoice review				
Ross, Samuel	10/11/2021	3.50	186.00	651.00	
	review rate and bill impacts review; dev council vote and reasons memo				
Ross, Samuel	10/12/2021	5.75	186.00	1,069.50	
	Develop Council Materials, team disc re: same; further development of Council vote and reasons memo; procedural schedule updates and corresp re: same				
Ross, Samuel	10/13/2021	5.75	186.00	1,069.50	
	Develop and review COuncil Materials;finalize and submit Council vote and reasons memo				
Ross, Samuel	10/14/2021	3.00	186.00	558.00	
	Review and finalize Council Materials; team calls re: same				

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Project	7395	Rhode Island EERMC - 2021		Invoice	7257
Ross, Samuel		10/19/2021	.50	186.00	93.00
		team call re: Council prep and IRs			
Ross, Samuel		10/25/2021	1.50	186.00	279.00
		Data request additions; disc re: same, edits following OER review			
Ross, Samuel		10/26/2021	1.75	186.00	325.50
		finalize data request; corresp re: filing			
Ross, Samuel		10/28/2021	.50	186.00	93.00
		retreat planning call			
Socks, Matthew		10/8/2021	1.00	198.00	198.00
		Internal project management mtg.			
		Totals	26.00		4,900.00
		Total Labor			4,900.00
				Total this Phase	\$4,993.00

Phase 003 EE & System Reliab. Prog. Design & Deliv

Optimal Staff

			Hours	Rate	Amount
Caesar, Adrian		10/1/2021	2.00	135.00	270.00
		EERMC non-endorsement memo - supplemental Gantt chart for key Plan topics, monthly RI data reporting reminders			
Caesar, Adrian		10/5/2021	.50	135.00	67.50
		EERMC non-endorsement memo - supplemental Gantt chart for key Plan topics			
Caesar, Adrian		10/7/2021	3.25	135.00	438.75
		October Res and C&I sector team call prep, notetaking, and follow-ups			
Caesar, Adrian		10/8/2021	2.50	135.00	337.50
		Weekly RI leads check-in re: 2022 Planning process timeline and deliverables, provisional plan and filed plan analysis, Council memo, Program comps analysis and BC MPS mapping tool updates for Grid provisional plan filing			
Caesar, Adrian		10/11/2021	1.00	135.00	135.00
		2022 provisional plan filing - BCR model review and program comps analysis			
Caesar, Adrian		10/12/2021	1.50	135.00	202.50
		October EERMC mtg materials prep - EERMC memo on non-endorsement, BCR MPS electric mapping tool updates for provisional filing, 2022 AP provisional filing and PUC/Plan proceedings update presentation, Oct 21 EERMC mtg agenda review			
Caesar, Adrian		10/13/2021	2.25	135.00	303.75
		October EERMC mtg materials prep - 2022 AP provisional filing and PUC/Plan proceedings update presentation			
Caesar, Adrian		10/14/2021	3.00	135.00	405.00
		October EERMC mtg materials prep - 2022 AP provisional filing and PUC/Plan proceedings update presentation			
Caesar, Adrian		10/15/2021	.50	135.00	67.50
		Weekly RI leads check-in re: 10/14 PUC open meeting debrief, 2022 Planning process timeline and deliverables, provisional plan and filed plan analysis, October Council mtg prep			
Caesar, Adrian		10/18/2021	4.50	135.00	607.50
		Preliminary Q3 Res and C&I data review and data reports			

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7257
Caesar, Adrian		10/19/2021	1.50	135.00		202.50
		Internal check-in re: October EERMC mtg prep, EERMC data requests to national grid, Preliminary Q3 Res/IES data report update				
Caesar, Adrian		10/20/2021	1.00	135.00		135.00
		Internal check-in re: EERMC fall retreat, 2022 provisional plan and EERMC education presentations,				
Caesar, Adrian		10/21/2021	.25	135.00		33.75
		October EERMC mtg prep				
Caesar, Adrian		10/22/2021	1.00	135.00		135.00
		Weekly RI leads check in re: october council mtg debrief, 2022 AP information requests document, council retreat planning, EERMC website updates				
Caesar, Adrian		10/29/2021	.50	135.00		67.50
		Weekly RI leads check-in re: 2022 planning and SOW development, Q4 2021 workplan, Fall council retreat planning				
Jacobs, Adam		10/1/2021	.75	186.00		139.50
		-follow-up email w/ Josh RE: check-in before October sector call -draft and send October C&I sector team call -scan RI plan updates doc				
Jacobs, Adam		10/4/2021	.25	186.00		46.50
		-review Craig's notes RE: electric/gas plan updates from National Grid in filing -initial review of final BC models				
Jacobs, Adam		10/6/2021	1.50	186.00		279.00
		-Vendor Outreach for RFI on Home Energy Estimation/labeling -RI daily scrum and National Grid's Annual Energy Efficiency Program Plan for 2022 -review Q4 subcontractor work order for C&I updates -RI cannabis baselines issue -check-in w/ Jen on 2022 contested case and potential data requests for Grid				
Jacobs, Adam		10/7/2021	1.50	186.00		279.00
		-RI C&I sector team call + notes and follow-ups -check-in w/ Josh from NGrid				
Jacobs, Adam		10/8/2021	.25	186.00		46.50
		-RI leads check-in call				
Jacobs, Adam		10/13/2021	.75	186.00		139.50
		-initial review/feedback on C-team provisional plan presentation -check-in w/ Craig on slides for next week's council meeting				
Jacobs, Adam		10/15/2021	.50	186.00		93.00
		-RI Leads Check-in				
Jacobs, Adam		10/18/2021	.75	186.00		139.50
		-add draft information requests to NGrid for C&I and ADM -answer to Sue EE/electrification question -review/update RI Active Demand savings values for ISO NE's EE forecasts				
Jacobs, Adam		10/19/2021	1.25	186.00		232.50
		-RI daily scrum -add to C&I IRs for NGrid -follow-up w/ Craig on IRs for NGrid -updated C&I IRs for SEMP's and CHP forward looking perspective				
Jacobs, Adam		10/20/2021	2.00	186.00		372.00
		-RI daily scrum (discuss retreat and IRs) -rescheduling November C&I sector call -update IRs and add participant increase from CHP spend reallocation request -review September C&I data report and add questions to commitment tracker file				

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Project	7395	Rhode Island EERMC - 2021			Invoice	7257
Jacobs, Adam		10/22/2021	1.50	186.00		279.00
		-RI team leads check-in call on IRs and council retreat -add IR on HVAC early retirements presented at EERMC meeting -update November C&I sector call meeting time and send reminder to review C&I data report/add questions to tracker				
Jacobs, Adam		10/27/2021	.50	186.00		93.00
		-review and provide feedback on NGrid request for extension on EERMC's First Set of Data Requests				
Jacobs, Adam		10/28/2021	1.75	186.00		325.50
		-RI daily scrum/retreat planning -review retreat planning docs -sector team agenda coordination -draft and send November sector team agenda -brainstorm HVAC market transformation deep dive content for council retreat w/ Craig				
Jacobs, Adam		10/29/2021	1.25	186.00		232.50
		-weekly RI leads check-in call -brainstorm Vacant Council Seats for small C&I, large C&I and municipalities				
Johnson, Craig		10/1/2021	4.25	186.00		790.50
		Draft and send out res sector team meeting agenda. Check-in w/ Mike re: sub needs through balance of Q4. Schedule time to check-in w/ res sector subs. Review filed plan numbers and BC models and compare to final draft numbers.				
Johnson, Craig		10/4/2021	2.00	186.00		372.00
		Filed plan review - Compare with final draft plan. Respond to Adam's question re: increase in C&I gas usage compared to final draft plan.				
Johnson, Craig		10/5/2021	3.00	186.00		558.00
		Memo for Council decision to not endorse plan - review and address Sam's comments. Update gantt chart with history of council discussion points. Check-in w/ residential team. Follow-up with Nathan re: RFI for virtual assessments.				
Johnson, Craig		10/6/2021	7.50	186.00		1,395.00
		Check-in w/ internal team on upcoming work, including sector team meetings, Council material development, and prepping for issuance of data requests on 2022 Plan. Review Sam's comments on memo from Council on decision to not endorse plan, finalize memo, discussion w/ Sam re: same.				
Johnson, Craig		10/7/2021	3.00	186.00		558.00
		Check-in w/ internal team on logistics for reviewing Ngrid provisional plan. Residential Sector Team Meeting - meeting prep and debrief.				
Johnson, Craig		10/8/2021	.75	186.00		139.50
		Weekly check-in with leads.				
Johnson, Craig		10/12/2021	6.50	186.00		1,209.00
		Morning check-in w/ internal team. Discuss provisional plan and council materials. C-Team/Ngrid/OER check-in. Detailed analytical review on provisional plan. Investigate shifts in program budgets and savings.				
Johnson, Craig		10/13/2021	6.00	186.00		1,116.00
		Review Council report on decision to not endorse. Provide comments and feedback. C-Team/OER/Division check-in meeting. Detailed analytical review on provisional plan. Investigate shifts in program budgets and savings.				
Johnson, Craig		10/14/2021	.25	186.00		46.50
		Follow PUC Open Meeting discussing procedural schedule for 2022 EE Plan.				
Johnson, Craig		10/15/2021	.50	186.00		93.00
		Weekly leads check-in meeting.				
Johnson, Craig		10/18/2021	2.25	186.00		418.50

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021			Invoice	7257
		Check-in w/ Adrian on Res Data report, troubleshoot missing data. Review and prep data requests on 2022 EE Plan.				
Johnson, Craig		10/19/2021	2.00	186.00		372.00
		Review draft information requests with internal team. Finalize res specific requests.				
Johnson, Craig		10/20/2021	.50	186.00		93.00
		Review, comment, and edit data information requests.				
Johnson, Craig		10/22/2021	1.50	186.00		279.00
		Weekly Leads Check-in. Debrief on Council meeting, discuss Council retreat, review and discuss process/timing of information requests on 2022 Plan. Write up additional requests for information for 2022 Plan, share internally. Review PUC/DPUC first set of IRs.				
Johnson, Craig		10/26/2021	1.75	186.00		325.50
		Final read through of EERMC IR document. Review PUC IR document to ensure no redundancy, discussion w/ internal team.				
Johnson, Craig		10/27/2021	2.00	186.00		372.00
		Review and comment on contractor survey. Review Grid request for extension on subset of Irs				
Johnson, Craig		10/28/2021	2.00	186.00		372.00
		Draft res sector team meeting agenda. Check in w/ Adam on sector team meeting agendas. Draft and send out res sector agenda. Correspond w/ Jill re: MF program transition.				
Johnson, Craig		10/29/2021	1.50	186.00		279.00
		Weekly leads check-in meeting. Discussed needs and plans for 2022 SOW, Council retreat, and 2022 Plan hearings.				
Mosenthal, Philip		10/7/2021	.50	212.00		106.00
		Annual report, Codes and standards initiative				
Ross, Samuel		10/1/2021	.50	186.00		93.00
		2022 EE Plan filing corresp				
Ross, Samuel		10/4/2021	3.50	186.00		651.00
		Q3 planning corresp; initial vote language and memo review and revisions; Part MF study Task 4 memo comments				
Ross, Samuel		10/5/2021	.25	186.00		46.50
		EMV agenda				
Ross, Samuel		10/6/2021	5.75	186.00		1,069.50
		C&I EMV monthly call; App recycling comments; team check in on council materials, vote memo, etc.; Cannabis baseline corresp; corresp w/member gill gase, disc re: PPL sale, climate policy in RI; following up on initial audit req and next steps re: Council vote memo; corresp re: CHP filing next steps				
Ross, Samuel		10/7/2021	3.00	186.00		558.00
		cont Cannabis Baseline, audit, and vote memo procedural next steps; EcoM monthly check in; finalize draft memo for OER initial review				
Ross, Samuel		10/8/2021	2.75	186.00		511.50
		cont audit, review of Council history of disc deliverable, coresp re: same; EMV corresp re: cust gas, app recycling, MF study task 2-3 memos; council meeting initial staffing disc				
Ross, Samuel		10/12/2021	1.00	186.00		186.00
		Ngrid check in, prep and follow up re: same				
Ross, Samuel		10/13/2021	1.00	186.00		186.00
		OER Div Check In				
Ross, Samuel		10/15/2021	2.00	186.00		372.00

If additional information is needed please contact Cindy Kimball at 802-482-5624 or kimball@optenergy.com. Federal Tax ID Number: 03-0351557.

Project	7395	Rhode Island EERMC - 2021		Invoice	7257
		EMV corresp, incl. custom gas study comments; internal team disc / IR kick off call			
Ross, Samuel		10/19/2021	.50	186.00	93.00
		EMV corresp			
Ross, Samuel		10/20/2021	3.25	186.00	604.50
		SRP TWG; NWA internal Grid analysis meetings, prep & follow up re: same; TWG cancellation corresp & call			
Ross, Samuel		10/21/2021	.75	186.00	139.50
		NP Customer Survey comments			
Ross, Samuel		10/24/2021	1.50	186.00	279.00
		EM&V - Dashboard and NP Survey Comments			
Ross, Samuel		10/25/2021	.25	186.00	46.50
		EMV Agenda			
Ross, Samuel		10/26/2021	.25	186.00	46.50
		EMV corresp			
Ross, Samuel		10/27/2021	.75	186.00	139.50
		light EMV monthly call, prep & follow up re: same			
Ross, Samuel		10/29/2021	3.75	186.00	697.50
		RI team weekly check in, retreat planning, Council mtg prep, PUC prep; council member gill case email response, follow up internal conv.; Corresp. on range of topics w/OER; information request response extension request internal disc & corresp.; procedural call scheduling			
		Totals	118.25		20,719.75
		Total Labor			20,719.75
				Total this Phase	\$22,402.75
				Total this Project	\$50,165.50
				Total this Report	\$50,165.50



EcoMetric Consulting, LLC
555 Exton Cms
Exton, PA 19341
610.400.8600
admin@ecometricconsulting.com

INVOICE

BILLED TO

Mike Guerard
Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

TOTAL DUE

\$3,217.50

Project Name RI EEMRC Consultant
Project # 7395
Invoice # 1029-P10-21
Billing Period 10/02/21 - 10/29/21

Invoice Date 10/31/2021
Due Date 11/30/2021
Payment Terms Net 30

Task Number	Description	Amount
Task 1	EM&V Oversight	\$3,217.50
Task 2	Program Design & Policy	\$0.00

Subtotal	\$3,217.50
Invoice Total	\$3,217.50

Invoice Number **1029-P10-21**
Period **10/02/21 - 10/29/21**

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	EM&V Oversight	Salil Gogte	Partner	2021-10	0	\$ 212.00	\$ -
RI EEMRC Consultant	EM&V Oversight	Michael Frischmann	Partner	2021-10	0	\$ 212.00	\$ -
RI EEMRC Consultant	EM&V Oversight	Michael Honeychuck	Managing Consultant	2021-10	16.25	\$ 198.00	\$ 3,217.50
RI EEMRC Consultant	EM&V Oversight	Bitul Sinha	Sr Engineer	2021-10	0	\$ 160.00	\$ -
RI EEMRC Consultant	EM&V Oversight	Divya Prasanna	Project Coordinator	2021-10	0	\$ -	\$ -
Total					16.25		\$ 3,217.50

Project	Task	Person	Title	Month	Hours	Rate	Amount
RI EEMRC Consultant	Program Design & Policy	Salil Gogte	Partner	2021-10	0	\$ 212.00	\$ -
RI EEMRC Consultant	Program Design & Policy	Michael Frischmann	Partner	2021-10	0	\$ 212.00	\$ -
RI EEMRC Consultant	Program Design & Policy	Michael Honeychuck	Managing Consultant	2021-10	0	\$ 198.00	\$ -
RI EEMRC Consultant	Program Design & Policy	Bitul Sinha	Sr Engineer	2021-10	0	\$ 160.00	\$ -
RI EEMRC Consultant	Program Design & Policy	Divya Prasanna	Project Coordinator	2021-10	0	\$ -	\$ -
Total					-		\$ -

Paste in timesheet extract here					
fname	lname	local_date	hours	task	notes
Michael	Honeychuck	10/6/2021	2.75	EM&V Oversight	Monthly C&I call with National Grid & C-Team Review, comments, emails & research about cannabis lighting baseline Appliance recycling report review & comments Invoicing discussions with Saill
Michael	Honeychuck	10/7/2021	1.75	EM&V Oversight	Monthly check-in with Sam Appliance recycling report review & comments Emails
Michael	Honeychuck	10/11/2021	0.5	EM&V Oversight	Emails & planning for upcoming study/memo reviews
Michael	Honeychuck	10/12/2021	1.5	EM&V Oversight	Custom Gas Program & individual Evaluation report reviews & comments Participation & Non-Participation report reviews, comments, emails Emails & planning
Michael	Honeychuck	10/14/2021	1.75	EM&V Oversight	Custom Gas Program Evaluation report review & comments Participation & Non-Participation report reviews, comments, emails
Michael	Honeychuck	10/15/2021	1.5	EM&V Oversight	Custom Gas Program Evaluation report review & comments Emails
Michael	Honeychuck	10/18/2021	0.5	EM&V Oversight	Weekly check-in Emails & planning
Michael	Honeychuck	10/19/2021	1	EM&V Oversight	Emails about natural gas program evaluation Planning for week
Michael	Honeychuck	10/22/2021	2.5	EM&V Oversight	Participation/MF dashboard review & comments Non-participation survey sampling plan review & comments Emails
Michael	Honeychuck	10/25/2021	1.25	EM&V Oversight	Natural gas program site report reviews
Michael	Honeychuck	10/27/2021	0.5	EM&V Oversight	Monthly residential call with National Grid & C-Team
Michael	Honeychuck	10/28/2021	0.75	EM&V Oversight	Brainstorm & compile list of studies from other states

Energy Futures Group, Inc.
PO Box 587
Hinesburg, VT 05461

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 4897
Invoice Date: October 31, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 10/1/2021 through 10/31/2021			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	8.50	\$198.00	\$1,683.00
LABOR - Intern Hours	0.00	\$50.00	\$0.00
LABOR - Travel Hours	0.00	\$99.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$1,683.00</u>

Energy Futures Group, Inc.

Services Performed 10/1/2021 to 10/31/2021

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
10/1/2021	Participation Analysis memo review and comments			0.75			0.75	0.00	0.75
10/5/2021	Follow up on request for info on market sizes re: Participation analysis memo			0.25			0.25	0.00	0.25
10/5/2021	RI check-in call; prep and follow up			0.50			0.50	0.00	0.50
10/5/2021	Update on plan status with C. Johnson			0.50			0.50	0.00	0.50
10/12/2021	Review and summarize monthly appliance and products data			0.50			0.50	0.00	0.50
10/14/2021	Review and comment on MF NP study data matching memo			0.50			0.50	0.00	0.50
10/15/2021	Prep for lighting call; lead lighting subgroup meeting with Ngrid			2.25			2.25	0.00	2.25
10/18/2021	Review of revised RI NP Survey			1.25			1.25	0.00	1.25
10/19/2021	Clean up and distribute notes from lighting subgroup			0.50			0.50	0.00	0.50
10/20/2021	Coordination with Travis Jenks re: Performance Lighting			0.25			0.25	0.00	0.25
10/21/2021	Comments on NP Survey sampling memo			0.25			0.25	0.00	0.25
10/26/2021	Reply to C. Johnson re. DEEP and EEB in CT			0.25			0.25	0.00	0.25
10/27/2021	Reply to inquiry on CT support for HP fuel switching			0.25			0.25	0.00	0.25
10/29/2021	Performance Lighting discussion with NGrid			0.50			0.50	0.00	0.50
							0.00	0.00	0.00
							0.00	0.00	0.00
	Total hours	0.00	0.00	15.50	0.00	0.00	15.50	0.00	15.50
	Total Amount	\$0.00	\$0.00	\$1,613.00	\$0.00	\$0.00	\$1,613.00	0.00	\$1,613.00

Margie Lynch/Core Energy Insights, Inc.
4445 E. Hoback River Road, Jackson, WY 83001

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: *CEI RI 10-2021*
Invoice Date: *October 28, 2021*
OEI Project #: *7395*

Work Performed for National Grid USA Service Company

Description of Services	Amount
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Services Performed 10/01/2021 through 10/31/2021

	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	0.50	\$186.00	\$93.00

TOTAL DUE **\$93.00**

Ralph Prah
7001 Stanhope Place, University Park FL 34201

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 23
Invoice Date: October 31, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services	Amount		
Services Performed 09/01/21 through 10/31/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	25.50	\$198.00	\$5,049.00
LABOR - Travel Hours	0.00	\$99.00	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$5,049.00</u>

Ralp Pra

Services performed 01/21 through 10/31/21

Date	Description of Services	001 - Policy Strategy	Travel Time	Sub-Total Regular	Sub-Total Travel	Total
				rs.	rs.	ours
9/1/2021	C&I studies call; C&I custom electric impact results	1.25		1.25	0.00	1.25
9/2/2021	electric custom impact expansion memo	1.00		1.00	0.00	1.00
9/3/2021	solar inverter study	0.25		0.25	0.00	0.25
9/7/2021	lci study	0.25		0.25	0.00	0.25
9/8/2021	RNC baseline study & compliance issues – conf call + prep	1.50		1.50	0.00	1.50
9/10/2021	C&I custom impact study	0.25		0.25	0.00	0.25
9/12/2015	solar inverter study	0.25		0.25	0.00	0.25
9/15/2021	inverter study	0.25		0.25	0.00	0.25
9/16/2021	P/NP study (task 2 memo)	0.50		0.50	0.00	0.50
9/20/2021	P/NP study – comment Task 2-3 memo; prep for LCI call	1.50		1.50	0.00	1.50
9/21/2021	LCI study (conf call + prep); rnc baseline plan rev	0.50		0.50	0.00	0.50
9/22/2021	res studies check-in call + prep	0.75		0.75	0.00	0.75
9/23/2021	RNC baseline res plan rev	0.25		0.25	0.00	0.25
9/24/2021	inverter study; ARP report; NP study participation memo and instr	1.75		1.75	0.00	1.75
9/26/2021	NP instr	1.50		1.50	0.00	1.50
9/27/2021	NP instr	0.25		0.25	0.00	0.25
9/28/2021	P/NP study participation analysis memo	1.75		1.75	0.00	1.75
9/29/2021	P/NP instr	0.25		0.25	0.00	0.25
9/30/2021	P/NP study (instr, memo); ARP report	0.75		0.75	0.00	0.75
10/1/2021	P/NP study; ARP report	0.50		0.50	0.00	0.50
10/3/2021	ARP report	1.00		1.00	0.00	1.00
10/4/2021	ARP report	1.00		1.00	0.00	1.00
10/5/2021	prep for C&I studies call; cannabis baseline issue	0.25		0.25	0.00	0.25
10/6/2021	Cannabis baseline issue; C&I studies call	1.00		1.00	0.00	1.00
10/7/2021	cannabis lighting baseline issue	0.50		0.50	0.00	0.50
10/8/2021	P/NP study – Task 2/3 memo rev; custom gas report	0.75		0.75	0.00	0.75
10/11/2021	custom gas imp report	1.50		1.50	0.00	1.50
10/14/2021	P study (Task 2-3 memo rev; instr rev)	1.50		1.50	0.00	1.50
10/15/2021	C&I custom gas report; NP study sampling memo	0.75		0.75	0.00	0.75
10/16/2021	NP study (instr, sampling memo)	1.00		1.00	0.00	1.00
10/18/2021	NP study	0.25		0.25	0.00	0.25
10/19/2021	P/NP study; C&I custom gas report	0.50		0.50	0.00	0.50
10/21/2021	P/NP study	0.25		0.25	0.00	0.25
	Total	25.50	0.00	25.50	0.00	25.50
	Total Amount	\$5,049.00	\$0.00	\$5,049.00	0.00	\$5,049.00

Rachel Sholly Energy Consulting
48 Hudson St. Providence, RI 02909

INVOICE

TO : Optimal Energy Inc.
10600 Route 116, Suite 3
Hinesburg, VT 05461

Invoice Number: 46
Invoice Date: October 31, 2021
OEI Project #: 7395

Work Performed for National Grid USA Service Company

Description of Services		Amount	
Services Performed 10/01/21 through 10/31/21			
	<u>Hours</u>	<u>Hourly Rate</u>	<u>Amount Due</u>
LABOR - Regular Hours	40.25	\$155.00	\$6,238.75
LABOR - Travel Hours	0.00	\$77.50	\$0.00
Travel Expenses (See attached travel expense form for details.)			\$0.00
TOTAL DUE			<u>\$6,238.75</u>

Raciel Solly Energy Consulting
Services Performed 10/01/21 through 10/31/21

Date	Description of Services	001 - EERMC Oversight	002- Dev of Work Products Rep. of EERMC	003 - EE System Reliab. Prog. Design Delivery	004 - Advancing Integrated Approaches Emerging Issues	Travel Time	Sub-Total Regular hrs.	Sub-Total Travel hrs.	Total hours
10/01/21	Connecting GBRI & NEED	0.25					0.25	0.00	0.25
10/04/21	Connecting GBRI & NEED; Emails w/OER	0.50					0.50	0.00	0.50
10/06/21	Monthly education call prep & follow-up	2.50					2.50	0.00	2.50
10/07/21	Event planning - keynote search; Retreat scheduling; Optimal weekly scrum; Communications re: 12 contract & NEED workshop; Reviewed Adrian's EE education slides	1.75					1.75	0.00	1.75
10/11/21	Gathered & sent speaker recs; Emails re: NEED curriculum licensing	2.00					2.00	0.00	2.00
10/12/21	Optimal weekly scrum; Retreat planning; Education update slides; Lecture 1 planning check-in	3.25					3.25	0.00	3.25
10/13/21	Finalized edu slides	1.00					1.00	0.00	1.00
10/14/21	Finalized & sent edu mtg notes, worked on video parameters, event planning & mtg scheduling; Optimal weekly scrum; Drafted first 3 video parameters	3.50					3.50	0.00	3.50
10/15/21	Feedback on lecture flyer, emailed Robert; Posted meeting materials; Event planning	1.00					1.00	0.00	1.00
10/19/21	Event planning check-in; Videos - reviewed feedback from Peter, drafted video parameters 2&3	4.00					4.00	0.00	4.00
10/20/21	Retreat scheduling & member info update	1.00					1.00	0.00	1.00
10/21/21	Optimal weekly scrum; Retreat planning; Lecture 1 planning & promo; Added lecture #1 to website; Prepped for EERMC presentation; EERMC meeting - edu update presentation; Updated EERMC contact list	6.25					6.25	0.00	6.25
10/22/21	Optimal RI leads check-in; Retreat planning - draft agenda & initial thoughts; Email re: videos; Retreat planning - location inquiries	4.50					4.50	0.00	4.50
10/26/21	Drafted talking points for Tony; Reviewed run of show; Lecture #1 check-in call & follow up; Sent video parameters to D&S	3.00					3.00	0.00	3.00
10/27/21	Sent talking points to Tony	0.50					0.50	0.00	0.50
10/28/21	Optimal weekly scrum - retreat planning; Retreat planning; EERMC Lecture #1; Secured retreat location	3.25					3.25	0.00	3.25
10/29/21	Optimal RI leads check-in; Website updates - member photos; Drafted edu mtg agenda; Edu mtg prep	2.00					2.00	0.00	2.00
	Total hours	0.25	0.00	0.00	0.00	0.00	0.25	0.00	0.25
	Total Amount	\$6,237.75	\$0.00	\$0.00	\$0.00	\$0.00	\$6,237.75	0.00	\$6,237.75



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	02/13/2020	Emails: Docket for EEPP 2020. Client re: agenda for meeting.	0.40	\$275.00	\$110.00
Service	02/21/2020	Emails: PUC staff, B. Trietch re: meeting materials.	0.40	\$275.00	\$110.00
Service	02/25/2020	Emails: B. Trietch re: exec comm minutes, outstanding question.	0.80	\$275.00	\$220.00
Service	02/27/2020	Emails: B. Trietch re: meeting materials.	0.20	\$275.00	\$55.00
Service	03/02/2020	Emails: RIPUC staff, Grid attorney re: docket filings.	0.20	\$275.00	\$55.00
Service	03/04/2020	Emails: B. Trietch re: questions from council on legal matters.	0.20	\$275.00	\$55.00
Service	03/05/2020	Telephone communications: M. Guerard, B. Trietch re: task list. Review email to prepare.	0.50	\$275.00	\$137.50
Service	03/09/2020	Begin reviewing materials for question on Standards. Emails with B. Trietch, M. Guerard re: same. Notes on same.	2.00	\$275.00	\$550.00
Service	03/10/2020	Review RI Ethics Commission opinion re: □. Verrengia. Annotate same. Draft and forward response email to B. Trietch. Email B. Trietch re: response format. Review updated task list, compare with notes and state law. Draft and send email response to B. Trietch, M. Guerard. Review past response on public meeting questions, draft and forward additional information to B. Trietch, M. Guerard.	3.00	\$275.00	\$825.00
Service	03/10/2020	Correspondences: B. Trietch, M. Guerard re: questions about bullet list items for council submittal to PUC.	0.50	\$275.00	\$137.50

INVOICE

Invoice # 553
Date: 03/11/2020
Due On: 04/10/2020

Invoice # 553 - 03/11/2020

Subtotal \$2,255.00

15-0001

EERMC Client Trust funds management.

Type	Date	Notes	Quantity	Rate	Total
Service	02/20/2020	Set up check printing from Money Market Account. Payment for Dunsky Energy and RI Builders Association. Reconcile IOLTA client account.	0.70	\$275.00	\$192.50
Service	02/20/2020	Attention to file re: Money Market monthly statement, interest earned. Update client IOLTA account spreadsheet. Email same to B. Trietch, N. Cleveland.	0.60	\$275.00	\$165.00
Expense	02/20/2020	Reimbursable expenses: Postage.	1.00	\$1.50	\$1.50
Expense	02/20/2020	Reimbursable expenses: Postage	1.00	\$0.50	\$0.50
Service	03/10/2020	Emails: N. Cleveland, B. Trietch re: IOLTA funding, Dunsky invoice.	0.40	\$275.00	\$110.00
				Subtotal	\$650
				Total	\$2,725.50

Detailed Statement of Account

Other Invoices

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
536	03/13/2020	\$1,760.50	\$0.00	\$1,760.50

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
553	04/10/2020	\$2,724.50	\$0.00	\$2,724.50
Outstanding Balance				\$5.00
Total Amount Outstanding				\$5.00

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	01/14/2020	Emails: RIPUC, B. Trietch, M. Guerard re: technical session, meeting.	0.60	\$275.00	\$165.00
Service	01/16/2020	Correspondences: B. Trietch re: revised contracts. C. Powell re: representation at PUC hearings.	0.50	\$275.00	\$137.50
Service	01/17/2020	Emails: B. Trietch re: revised contracts. Review and comment on same.	0.60	\$275.00	\$165.00
Service	01/21/2020	Emails: B. Trietch re: contract extension. Review files for previous contract and review same.	0.30	\$275.00	\$82.50
Service	01/22/2020	Review new draft Legal Contract. Emails with B. Trietch re: same.	0.40	\$275.00	\$110.00
Service	01/31/2020	Legal research: Research Open Meetings Act.	1.80	\$100.00	\$180.00
Service	02/03/2020	Drafting documents: Drafting memo re: Open Meetings Act.	1.40	\$100.00	\$140.00
Service	02/04/2020	Emails: B. Trietch, M. Guerard re: questions from executive committee meeting. C. Powell, B. Trietch re: RI Home Show contract. Review same.	0.80	\$275.00	\$220.00
Service	02/04/2020	Emails: Email Attorney Desautel re: Memo on Open Meetings Act.	0.10	\$100.00	\$10.00
Service	02/05/2020	Emails: B. Trietch re: RI Home Show contract.	0.20	\$275.00	\$55.00
Service	02/11/2020	Emails: B. Trietch, M. Guerard re: questions from executive session.	0.40	\$275.00	\$110.00
				Subtotal	\$1,375.00

15-0001 ☐

EERMC Client Trust ☐unds management.

Type	Date	Notes	Quantity	Rate	Total
Service	01/21/2020	Set up check printing from Money Market Account. Payment for Optimal Energy and Desautel Law. Reconcile IOLTA client account.	0.70	\$275.00	\$192.50
Expense	01/21/2020	Reimbursable expenses: Postage	1.00	\$0.50	\$0.50
Service	02/03/2020	Deposit National Grid check with teller for Money Market account. Update and balance client spreadsheet.	0.50	\$275.00	\$137.50
Service	02/04/2020	Emails: N. Cleveland re: client account.	0.20	\$275.00	\$55.00
Subtotal					\$3,550.50
Total					\$1,760.50

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
536	03/13/2020	\$1,760.50	\$0.00	\$1,760.50
Outstanding Balance				\$1,760.50
Total Amount Outstanding				\$1,760.50

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	03/12/2020	Correspondences: Attorney Maicher re: intervention for PUC docket 5015. Review same. B. Trietch, M. Guerard re: EERMC intervention. National Grid re: comments to LCP.	1.00	\$275.00	\$275.00
Service	03/12/2020	Attention to PUC docket 5015, state law. Review previous PUC docket filings. Question whether to intervene.	0.80	\$275.00	\$220.00
Service	03/12/2020	Draft and file Motion to Intervene in PUC docket 5015. Service on PUC and service list.	1.00	\$275.00	\$275.00
Expense	03/12/2020	Reimbursable expenses: Postage	1.00	\$0.50	\$0.50
Service	03/13/2020	Emails: OER, National Grid, PUC re: redlined version of LCP standards. Review same.	0.50	\$275.00	\$137.50
Service	03/16/2020	Emails: DPUC, OER, National Grid re: revisions to LCP language. Review same. B. Trietch re: meeting materials. Review same. PUC re: Docket notices, e-filing.	1.40	\$275.00	\$385.00
Service	03/17/2020	Correspondences: B. Trietch re: Executive Order for OMA and review same, memo for meeting. Review materials for meeting.	0.80	\$275.00	\$220.00
Service	03/17/2020	Correspondences: B. Trietch re: memo for council meeting.	0.40	\$275.00	\$110.00
Service	03/18/2020	Draft memo from email, review LCP statute to add information to memo. Finalize and forward to B. Trietch.	1.40	\$275.00	\$385.00
Service	03/18/2020	Emails: B Trietch re: meeting materials for 3/19	0.60	\$275.00	\$165.00

INVOICE

Invoice # 573
Date: 04/10/2020
Due On: 05/10/2020

		teleconference meeting. Review same.			
Service	03/19/2020	Emails: B. Trietch re: materials for 3/19 meeting. Review same.	0.40	\$275.00	\$110.00
Service	03/19/2020	Telephone communications: GoToMeeting - March EERMC meeting.	2.50	\$275.00	\$687.50
Service	03/20/2020	Correspondences: M. Guerard re: changes to documents for filing with PUC. B. Trietch, PUC staff re:late filing.	0.80	\$275.00	\$220.00
Service	03/23/2020	Finalize cover letter and prepare materials for e-filing with PUC. Attention to paper copy requirements. File with PUC, e-service to docket list.	1.00	\$275.00	\$275.00
Service	03/25/2020	Printing, print issues with formatting, mailing documents to PUC for docket 5015. Email B. Trietch, M. Guerard, PUC Attorney Frias, PUC staff re: same.	1.50	\$275.00	\$412.50
Expense	03/25/2020	Reimbursable expenses: Postage	1.00	\$1.60	\$1.60
Service	03/30/2020	Emails: RIPUC staff re: hearing for docket 5023.	0.20	\$275.00	\$55.00
Service	04/03/2020	Correspondences: Conference call with PUC for Targets and LCP Standards dockets. Email M. Guerard, B. Trietch re: procedure. Review previous PUC dockets re: same.	1.00	\$275.00	\$275.00
Service	04/06/2020	Emails: PUC staff re: intervention, schedule. M. Guerard, B. Trietch re: C-Team and redline from OER.	0.80	\$275.00	\$220.00
Service	04/07/2020	Attention to filings for PUC Standards Docket.	0.50	\$275.00	\$137.50
Service	04/08/2020	Correspondences: B. Trietch, M. Guerard re: redlined Standards. PUC staff re: Standards session and filing.	1.10	\$275.00	\$302.50
Service	04/08/2020	Review, finalize, convert to pdf, redlined LCP Standards document. Forward same to PUC and docket 5015 service list.	0.40	\$275.00	\$110.00
Service	04/09/2020	Appearance: Zoom Meeting: PUC Technical Session for docket 5015.	4.00	\$275.00	\$1,100.00
				Subtotal	\$6,071.60

15-0001 ☐

EERMC Client Trust ☐unds management.

Type	Date	Notes	Quantity	Rate	Total
Service	03/11/2020	Deposit National Grid check with teller for Money Market account. Update and balance client	0.50	\$275.00	\$137.50

spreadsheet.

Service	03/12/2020	Attention to file re: Money Market monthly statement, interest earned. Update client IOLTA account spreadsheet. Email same to B. Trietch, N. Cleveland.	0.60	\$275.00	\$165.00
Service	03/12/2020	Set up check printing from Money Market Account. Payment for Dunsky. Reconcile IOLTA client account.	0.50	\$275.00	\$137.50
Expense	03/12/2020	Reimbursable expenses: Postage.	1.00	\$1.50	\$1.50
				Subtotal	\$1,501.50
				Total	\$6,521.10

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due	
573	05/10/2020	\$6,521.10	\$0.00	\$6,521.10	
				Outstanding Balance	\$6,521.10
				Total Amount Outstanding	\$6,521.10

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

INVOICE

Invoice # 584
Date: 05/11/2020
Due On: 06/10/2020

Type	Date	Notes	Quantity	Rate	Total
Service	04/13/2020	Emails: Attorney Webster, M. Guerard, B. Trietch re: Grid's motion to intervene, OER filing. Review same.	1.00	\$275.00	\$275.00
Service	04/14/2020	Review of documents: National Grid's comments on EERMC Savings Targets for docket 5023, and Motion to Intervene. Email M. Guerard re: same. Review C-Team comments. Public Notice for technical session on 4/17. Email Attorney Harrington re: data requests.	1.80	\$275.00	\$495.00
Service	04/16/2020	Emails: PUC Attorney Harrington, M. Guerard, S. Ross, B. Trietch re: materials for technical session.	0.40	\$275.00	\$110.00
Service	04/16/2020	Review two new Decision and Order from PUC for dockets 4888 & 4889. Call with C-Team, review materials for preparation.	0.70	\$275.00	\$192.50
Service	04/17/2020	Appearance: PUC technical session for Targets,	3.70	\$275.00	\$1,017.50
Service	04/21/2020	Review OER comments for SRP Standards docket.	0.20	\$275.00	\$55.00
Service	04/27/2020	Emails: B.Trietch, PUC staff re: meeting materials.	0.30	\$275.00	\$82.50
Service	04/27/2020	Correspondences: PUC Attorney Harrington, M. Guerard, S. Ross, B. Trietch re: data requests.	0.50	\$275.00	\$137.50
Service	04/28/2020	Emails: Attorney Harrington, client group re: data requests. Review same.	1.50	\$275.00	\$412.50
Service	04/28/2020	Review of documents: Review Docket 5023 PUC Data Requests.	0.30	\$100.00	\$30.00
Service	04/29/2020	Emails: Attorney Harrington, C-Team, B. Trietch re: data requests.	0.30	\$275.00	\$82.50

Invoice # 584 - 05/11/2020

Service	04/30/2020	Draft Memo on EERMC member activity as stakeholder involvement, emails with B. Trietch re: same.	0.60	\$275.00	\$165.00
Service	04/30/2020	Drafting documents: Drafting Cover Letter for Docket #5023 EERMC Response to PUC First Set of Data Requests.	3.30	\$100.00	\$330.00
Service	04/30/2020	B. Trietch re: meeting materials. Review same.	0.20	\$275.00	\$55.00
Service	05/01/2020	Emails: C-Team, B. Trietch re: data request responses.	0.40	\$275.00	\$110.00
Service	05/01/2020	Finalize and sign cover letter for data requests.	0.20	\$275.00	\$55.00
Service	05/01/2020	Drafting documents: EERMC cover letter for responses to PUC data requests.	0.30	\$100.00	\$30.00
Service	05/01/2020	Emails: File EERMC responses to PUC data requests; email list serve re: same.	0.60	\$100.00	\$60.00
Service	05/06/2020	Emails: PUC staff re: Open Meeting for EE docket, compliance filings.	0.30	\$275.00	\$82.50
Service	05/08/2020	Emails: B. Trietch re: agenda item for legal services. Review agenda.	0.20	\$275.00	\$55.00
Service	05/08/2020	Appearance: PUC Open Meeting re: Docket No. 5023. Notes on EERMC matter.	0.50	\$100.00	\$50.00
Service	05/08/2020	Emails: Attorney Desautel, Becca Trietch, and Mike Guerard re: PUC Open Meeting.	0.30	\$100.00	\$30.00
				Subtotal	\$3,112.50

15-0001 □

EERMC Client Trust □unds management.

Type	Date	Notes	Quantity	Rate	Total
Service	04/22/2020	Attention to file re: Money Market monthly statement, interest earned. Update client IOLTA account spreadsheet. Email same to B. Trietch, N. Cleveland.	0.60	\$275.00	\$165.00
Service	04/27/2020	Set up check printing from Money Market Account. Payment for Dunsky. Reconcile IOLTA client account.	0.50	\$275.00	\$137.50
Expense	04/27/2020	Reimbursable expenses: Postage.	1.00	\$1.50	\$1.50
				Subtotal	\$301.00
				Total	\$1,216.50

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
584	06/10/2020	\$4,216.50	\$0.00	\$4,216.50
Outstanding Balance				\$4,216.50
Total Amount Outstanding				\$4,216.50

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

INVOICE

Invoice # 605
Date: 06/10/2020
Due On: 07/10/2020

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	05/18/2020	Emails: National Grid re: filing for Docket 4888. Review same.	0.20	\$275.00	\$55.00
Service	05/18/2020	Review and revise contract with NEED. Forward same to B. Trietch.	0.60	\$275.00	\$165.00
Service	05/27/2020	Correspondences: PUC Attorney Harrington, B. Trietch, M. Guerard re: LCP Standards and comments.	1.20	\$275.00	\$330.00
Service	05/29/2020	Emails: RIPUC re: LCP Standards and option for comments. Review Notice, forward to client.	0.30	\$275.00	\$82.50
				Subtotal	\$632.50

15-0001 ☐

EERMC Client Trust ☐unds management.

Type	Date	Notes	Quantity	Rate	Total
Service	05/11/2020	Attention to file re: Money Market monthly statement, interest earned. Update client IOLTA account spreadsheet. Email same to B. Trietch, N. Cleveland.	0.60	\$275.00	\$165.00
Service	06/10/2020	Attention to file re: Money Market monthly statement, interest earned. Update client IOLTA account spreadsheet. Email same to B. Trietch, N. Cleveland.	0.60	\$275.00	\$165.00

Invoice # 605 - 06/10/2020

Subtotal **\$330.00**

Total **\$ 62.50**

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
605	07/10/2020	\$962.50	\$0.00	\$962.50
Outstanding Balance				\$ 62.50
Total Amount Outstanding				\$ 62.50

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	06/11/2020	Review of documents: Review Vendor Agreement with NEED and 220-RICR-30-00-13.	0.70	\$100.00	\$70.00
Service	06/12/2020	Emails: OER staff, Attorney Marcher re: changes to contractor agreement. Review agreement, regulations and revise.	0.70	\$275.00	\$192.50
Service	06/16/2020	Emails: B. Trietch re: meeting materials. Review same.	0.20	\$275.00	\$55.00
Service	06/17/2020	Emails: B. Trietch, M. Guerard re: LCP docket filings and C-Team Presentation. Review same.	1.00	\$275.00	\$275.00
Service	06/17/2020	Emails: Mike Guerard and Becca Trietch re: LCP standards.	0.50	\$100.00	\$50.00
Service	06/18/2020	Review materials for EERMC meeting.	0.40	\$275.00	\$110.00
Service	06/19/2020	Review LCP comments filed by National Grid. Attention to format. Review redlined versions of EERMC Memo for LCP filing.	0.50	\$275.00	\$137.50
Service	06/19/2020	Telephone communications: M. Guerard re: LCP comments for PUC filing.	0.50	\$275.00	\$137.50
Service	06/19/2020	Review, revise, finalize materials for filing in LCP docket.	0.30	\$275.00	\$82.50
Service	06/19/2020	Filing of Documents: Drafting and filing EERMC comments on Docket No. 5015.	0.90	\$100.00	\$90.00
Service	06/23/2020	Review of documents: Filings for LCP docket.	0.80	\$275.00	\$220.00
Service	07/01/2020	Emails: Attorney Marcaccio re: Request for Annual and	0.40	\$275.00	\$110.00

INVOICE

Invoice # 619
Date: 07/10/2020
Due On: 08/09/2020

3 Year Plans. Review same.					
Service	07/07/2020	Emails: M. Guerard re: LCP potential impacts.	0.20	\$275.00	\$55.00
Service	07/08/2020	Emails: M. Guerard re: PUC filing for Demand Response Potential Study Update.	0.40	\$275.00	\$110.00
Service	07/10/2020	Drafting documents: Review and revise contract with URI. Forward same to OER staff.	1.20	\$275.00	\$330.00
				Subtotal	\$2,025.00

15-0001 ☐

EERMC Client Trust ☐unds management.

Type	Date	Notes	Quantity	Rate	Total
Service	07/10/2020	Attention to file re: Money Market monthly statement, interest earned. Update client IOLTA account spreadsheet. Email same to B. Trietch, N. Cleveland.	0.60	\$275.00	\$165.00
				Subtotal	\$165.00
				Total	\$2,1☐0.00

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
619	08/09/2020	\$2,190.00	\$0.00	\$2,190.00
			Outstanding Balance	\$2,1☐0.00
			Total Amount Outstanding	\$2,1☐0.00

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	07/15/2020	Emails: OER staff re: meeting materials, URI contract, 3 Year Plan memo. Review same.	0.50	\$275.00	\$137.50
Service	07/17/2020	Emails: M. Guerard, B. Trietch re: memo for filing.	0.30	\$275.00	\$82.50
Service	07/17/2020	Emails: M. Guerard re: Docket 5023 filing.	0.20	\$275.00	\$55.00
Service	07/17/2020	Filing of Documents: Drafting and filing EERMC Memo re: Rhode Island Market Potential Study Updated Demand Response Results for Docket 5023.	0.50	\$275.00	\$137.50
Service	07/20/2020	Emails: L. Massaro re: hard copy filing of EERMC memo for Docket 5023.	0.20	\$275.00	\$55.00
Service	07/21/2020	Ordering prints of EERMC Memo to PUC for Docket 5023.	0.30	\$275.00	\$82.50
Service	07/22/2020	Filing of Documents: Filing EERMC Memo re: Demand Response for Docket 5023.	0.30	\$275.00	\$82.50
Expense	07/22/2020	Reimbursable expenses: Prints of EERMC Memo to PUC re: Demand Response for Docket 5023.	1.00	\$323.57	\$323.57
Expense	07/22/2020	Reimbursable expenses: Shipment costs of EERMC Memo to PUC re: Demand Response for Docket 5023.	1.00	\$25.40	\$25.40
Service	07/23/2020	Attend PUC Public Meeting re: Docket 5015 Least Cost Procurement Standards; notes on same.	2.20	\$275.00	\$605.00
Service	07/24/2020	Emails: M. Guerard and B. Trietch re: PUC Public meeting Docket 5015.	0.20	\$275.00	\$55.00
Service	08/05/2020	Emails: RIPUC docket service list re: various filings.	0.40	\$275.00	\$110.00

INVOICE

Invoice # 637
Date: 08/17/2020
Due On: 09/16/2020

Invoice # 637 - 08/17/2020

Check for EERMC entry.					
Service	08/12/2020	Attention to PUC Order re: Docket No. 4684 - EERMC - Savings Targets and Standards for Energy Efficiency and Conservation Procurement and System Reliability.	0.80	\$275.00	\$220.00
Service	08/13/2020	Attention to National Grid request to change EERMC November 2020 meeting date.	0.50	\$275.00	\$137.50
Service	08/14/2020	Emails B. Trietch re: EERMC August Meeting Agenda and Materials; review same.	0.50	\$275.00	\$137.50
				Total	\$2,216.17

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due	
637	09/16/2020	\$2,246.47	\$0.00	\$2,246.47	
				Outstanding Balance	\$2,216.17
				Total Amount Outstanding	\$2,216.17

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	08/17/2020	Emails: Attorney Marcaccio, B. Trietch re: request for November meeting.	0.20	\$275.00	\$55.00
Service	08/17/2020	Attention to PUC Order relating to EERMC's May 2018 proposed revision to LCP standards.	0.30	\$275.00	\$82.50
Service	08/17/2020	Emails: C. Wilson Frias re: Docket 4770 PST Advisory Group Workshop.	0.30	\$275.00	\$82.50
Service	08/18/2020	Emails: B. Trietch, M. Guerard re: meeting updates. Review meeting materials.	0.50	\$275.00	\$137.50
Service	08/18/2020	Attention to Docket 4684 EERMC - Savings Targets and Standards for Energy Efficiency and Conservation Procurement and System Reliability.	0.20	\$275.00	\$55.00
Service	08/19/2020	Attention to PUC open meeting 8/20/2020 for Docket 4770.	0.20	\$275.00	\$55.00
Service	08/20/2020	Emails: Client re: agenda materials, meeting updates.	0.40	\$275.00	\$110.00
Service	08/24/2020	Review PUC Order on Docket No. 4684; draft memo on same.	2.80	\$275.00	\$770.00
Service	08/25/2020	Drafting documents: Finish drafting memo on PUC Order on Docket No. 4684.	0.30	\$275.00	\$82.50
Service	08/25/2020	Review of documents: Review PUC Order re: Docket 5015 Least Cost Procurement Standards.	0.50	\$275.00	\$137.50
Service	08/26/2020	Continue reviewing PUC Order re: Docket 5015 Least Cost Procurement Standards; notes on same.	2.00	\$275.00	\$550.00

Invoice # 652 - 09/11/2020

Service	08/26/2020	Begin reviewing National Grid's responses to PUC data request - set 2 for Docket 4770; notes on same.	0.30	\$275.00	\$82.50
Service	08/27/2020	Continue reviewing National Grid's responses to PUC data request - set 2 for Docket 4770; notes on same. Other docket notifications.	0.70	\$275.00	\$192.50
Service	08/28/2020	Attention to National Grid's Annual Energy Efficiency Plan for 2021.	0.70	\$275.00	\$192.50
Service	08/31/2020	Review draft Memo re: Least Cost Procurement Standards from PUC. Attention to meeting agendas for applicable meeting topic.	0.40	\$275.00	\$110.00
Service	08/31/2020	Attention to memo on PUC Order 5015; begin memo for PUC re: same.	0.20	\$275.00	\$55.00
Service	09/04/2020	Correspondences: B. Trietch re: questions related to RFP and executive session. Attention to follow up Memo.	0.80	\$275.00	\$220.00
Service	09/08/2020	Review materials related to PUC Docket 5015, draft memo on PUC Order and EERMC requirements/recommendations.	3.00	\$275.00	\$825.00
Service	09/08/2020	Drafting documents: Reading the procurement documents sent by client; researching the applicable sections of law; drafting a memo re: procurement process questions asked by client; editing the draft meeting agenda to reflect findings.	2.60	\$0.00	\$0.00
Service	09/09/2020	Emails: M. Guerard, R. Sholly re: retreat.	0.20	\$275.00	\$55.00
Service	09/09/2020	Drafting documents: Finish drafting memo for EERMC on PUC Order for Docket 5015.	1.50	\$275.00	\$412.50
Service	09/10/2020	Finalize Memo on PUC Order in Docket 5015 and email to B. Trietch and M. Guerard.	0.30	\$275.00	\$82.50
Service	09/10/2020	Review and revise draft memo on LCP Standards. Review and revise draft memo on procurement.	0.50	\$275.00	\$137.50
Service	09/10/2020	Drafting documents: Edits to the memo on procurement for the upcoming EERMC meeting.	1.00	\$0.00	\$0.00
Service	09/10/2020	Attention to EERMC questions re: RFP proposals.	0.50	\$275.00	\$137.50
				Subtotal	\$6,620.00

15-0001

EERMC Client Trust unds management.

Type	Date	Notes	Quantity	Rate	Total
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Invoice # 652 - 09/11/2020

Service	08/21/2020	Attention to file re: Money Market July statement, interest earned. Update client IOLTA account spreadsheet. Email same to B. Trietch, N. Cleveland.	0.60	\$275.00	\$165.00
Service	09/04/2020	Emails: N. Cleveland, National Grid re: client funds account request.	0.30	\$275.00	\$82.50
Service	09/10/2020	Attention to file re: Money Market August statement, interest earned. Update client IOLTA account spreadsheet. Email same to B. Trietch, N. Cleveland.	0.60	\$275.00	\$165.00
				Subtotal	\$1,212.50
				Total	\$5,032.50

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due	
652	10/11/2020	\$5,032.50	\$0.00	\$5,032.50	
				Outstanding Balance	\$5,032.50
				Total Amount Outstanding	\$5,032.50

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	09/08/2020	Drafting documents: Reading the procurement documents sent by client; researching the applicable sections of law; drafting a memo re: procurement process questions asked by client; editing the draft meeting agenda to reflect findings.	2.60	\$275.00	\$715.00
Service	09/10/2020	Drafting documents: Edits to the memo on procurement for the upcoming EERMC meeting.	1.00	\$275.00	\$275.00
Service	09/11/2020	Drafting documents: Adding regulations citations to procurement memo and editing the meeting agenda to describe Executive Sessions in detail; email on same.	0.60	\$275.00	\$165.00
Service	09/14/2020	Attention to file materials, RFP and Memo for call with B. Trietch. Call with B. Trietch re:our Memo. Revise Memo to reflect cost memo issues.	0.80	\$275.00	\$220.00
Service	09/14/2020	Emails: Re: follow-up question from client on RFP/ procurement memo.	0.30	\$275.00	\$82.50
Service	09/16/2020	Correspondences: B. Trietch re: RFP questions and meeting. R. Sholly re: retreat. Schedule same. Review meeting materials.	1.00	\$275.00	\$275.00
Service	09/17/2020	Attention to file materials re: request for conflict of interest review.	0.40	\$275.00	\$110.00
Service	09/17/2020	Meeting: Virtual September Council meeting: Executive Session.	1.70	\$275.00	\$467.50
Service	09/18/2020	Correspondences: P. Case re: potential conflict of issue question. M. Guerard re: preparation for council retreat. Review slide deck/agenda.	1.00	\$275.00	\$275.00

INVOICE

Invoice # 670
Date: 10/12/2020
Due On: 11/11/2020

Invoice # 670 - 10/12/2020

Service	09/18/2020	Review Ethics Commission Advisory Opinions, state law, Code of Ethics re: conflict of interest with financial gain. Email to P. Case re: same.	0.70	\$275.00	\$192.50
Service	09/21/2020	Meeting: Council virtual retreat. Review file materials to prepare for presentation. Zoom Executive Session meeting.	2.50	\$275.00	\$687.50
Service	09/22/2020	Emails: PUC re: Data Requests to National Grid in Docket 4770.	0.30	\$275.00	\$82.50
Service	09/24/2020	Emails: B. Trietch re: revised RFP, meeting. Review RFP.	0.60	\$275.00	\$165.00
Service	10/07/2020	Legal research: Review statutes and EERMC by-laws regarding Executive Session meeting minutes voting requirements and publication requirements.	1.20	\$275.00	\$330.00
Service	10/07/2020	Emails: B. Trietch re: meeting materials. Review same.	0.40	\$275.00	\$110.00
Service	10/08/2020	Emails: N. Cleveland, B. Trietch re: process for executive session minutes. Review materials from B. Trietch.	1.40	\$275.00	\$385.00
Service	10/09/2020	Emails: National Grid re: Signature Page for 2021 and 2021-2023 EE Plans. Review, sign and send back.	0.40	\$275.00	\$110.00
				Subtotal	\$6,677.50

15-0001

EERMC Client Trust funds management.

Type	Date	Notes	Quantity	Rate	Total
Service	09/17/2020	Set up check printing from Money Market Account. Payment for Allegra. Reconcile IOLTA client account.	0.50	\$275.00	\$137.50
Expense	09/17/2020	Reimbursable expenses: Postage	1.00	\$0.50	\$0.50
Service	10/05/2020	Attention to file re: Money Market September statement, interest earned. Update client IOLTA account spreadsheet. Email same to B. Trietch, N. Cleveland.	0.60	\$275.00	\$165.00
				Subtotal	\$303.00
				Total	\$6,980.50

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
670	11/11/2020	\$4,950.50	\$0.00	\$4,950.50
Outstanding Balance				\$4,950.50
Total Amount Outstanding				\$4,950.50

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	10/13/2020	Emails: C-Team re: CE Report and filing. Review report for filing details.	0.50	\$275.00	\$137.50
Service	10/14/2020	Emails: C-Team re: 2021 Annual Energy Efficiency Plan, and 2021-2023 Energy Efficiency Plan.	0.80	\$275.00	\$220.00
Service	10/16/2020	Emails: PUC docket list, C-Team re: CE Report filing.	0.30	\$275.00	\$82.50
Service	10/19/2020	Attention to PUC filing for CE Report, National Grid filing and date.	0.40	\$275.00	\$110.00
Service	10/20/2020	Revise cover letter and review docket filings for CE Report. Attention to new PUC COVID-19 filing policy.	0.40	\$275.00	\$110.00
Service	10/20/2020	Drafting cover letter for EERMC cost-efficiency report; filing cover letter and report. Service to distribution list and copies for PUC filing, in accordance with their COVID-19 policy.	2.40	\$275.00	\$660.00
Expense	10/20/2020	Reimbursable expenses: First Class Mail - Docket 5076 EERMC Cost-Effectiveness Report.	1.00	\$11.16	\$11.16
Service	10/21/2020	Attention to PUC prehearing call for CE Report docket.	0.20	\$275.00	\$55.00
Service	10/23/2020	Telephone communications: PUC Prehearing Conference call for Docket 5076. Calendar dates.	0.50	\$275.00	\$137.50
Service	10/26/2020	Emails: Attorney Harrington re: procedural schedule for docket 5076. Service list re: motion to intervene.	0.40	\$275.00	\$110.00
Service	10/27/2020	Attention to National Grid's Technical Reference Manual and Energy Efficiency Studies - Docket No.	0.40	\$275.00	\$110.00

INVOICE

Invoice # 688
Date: 11/10/2020
Due On: 12/10/2020

Invoice # 688 - 11/10/2020

5076.					
Service	10/28/2020	Docket 5076: National Grid's filing.	0.20	\$275.00	\$55.00
Service	10/28/2020	Emails: M. Guerard re: National Grid's Technical Reference Manual and Energy Efficiency Studies - Docket No. 5076.	0.20	\$275.00	\$55.00
Service	11/03/2020	Emails: PUC Attorney Harrington re: data request for docket 5076. Review same.	0.20	\$275.00	\$55.00
Service	11/06/2020	Emails: B. Trietch re: meeting materials.	0.40	\$275.00	\$110.00
Service	11/10/2020	Review agenda materials.	0.20	\$275.00	\$55.00
				Subtotal	\$2,073.66

15-0001

EERMC Client Trust Funds management.

Type	Date	Notes	Quantity	Rate	Total
Service	11/10/2020	Attention to file re: Money Market October statement, interest earned. Update client IOLTA account spreadsheet. Email same to B. Trietch, N. Cleveland.	0.60	\$275.00	\$165.00
				Subtotal	\$165.00
				Total	\$2,238.66

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
688	12/10/2020	\$2,238.66	\$0.00	\$2,238.66
			Outstanding Balance	\$2,238.66
			Total Amount Outstanding	\$2,238.66

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

INVOICE

Invoice # 706
Date: 12/10/2020
Due On: 01/09/2021

Type	Date	Notes	Quantity	Rate	Total
Service	11/12/2020	Emails: M. Guerard, service list for docket 5076 re: prefiled testimony. Review filings.	1.00	\$275.00	\$275.00
Service	11/12/2020	Meeting: Executive Session during November meeting.	0.90	\$275.00	\$247.50
Service	11/13/2020	Emails: RIPUC re: open meeting for dockets.	0.20	\$275.00	\$55.00
Service	11/16/2020	Correspondences: N. Grid, B. Trietch, M. Guerard re: SRP signature page.	0.40	\$275.00	\$110.00
Service	11/17/2020	Attention to data request responses, signature page for SRP sent back to National Grid.	0.70	\$275.00	\$192.50
Service	11/19/2020	Emails: Comments and data responses filed in docket 5076. Review same.	0.50	\$275.00	\$137.50
Service	11/20/2020	Correspondences: RIPUC Attorney Harrington re: intervention status.	0.40	\$275.00	\$110.00
Service	11/23/2020	Emails: RIPUC Attorney Harrington, C-Team, B. Trietch re: data requests. Review same and calendar. Attention to data requests for docket 5076. Review filing for docket 5080.	1.00	\$275.00	\$275.00
Service	11/23/2020	Drafting documents: Notice of Participation in docket 5076. Review previous filings in other dockets and sub̄ect docket, statutory authority. E-file and serve.	1.20	\$275.00	\$330.00
Service	11/24/2020	Emails: National Grid re: data request responses.	0.20	\$275.00	\$55.00
Service	11/25/2020	Meeting: PUC Open Meeting for docket 5076.	1.00	\$275.00	\$275.00

Service	11/27/2020	Emails: C-Team re: filing for DR responses in PUC docket 5076.	0.60	\$275.00	\$165.00
Service	11/27/2020	Draft cover letter for DR response in PUC docket 5076. Review C-Team response docket, download all minutes. Prepare filing for PUC and e-file; service on docket list.	1.60	\$275.00	\$440.00
Service	11/30/2020	Drafting cover letter for EERMC cost-efficiency report; filing cover letter and report. Service to distribution list and copies for PUC filing, in accordance with their COVID-19 policy.	2.00	\$275.00	\$550.00
Service	12/03/2020	Emails: RIPUC Attorneys, National Grid re: data requests. Monitor same for response obligations.	0.40	\$275.00	\$110.00
Service	12/04/2020	Correspondences: C-Team re: testimony. RIPUC and docket attorneys re: procedure for hearings.	1.00	\$275.00	\$275.00
Service	12/04/2020	Review of documents: Acadia Center comments for Docket #5076.	0.20	\$275.00	\$55.00
Service	12/06/2020	Emails: RIPUC re: hearing information. Forward same to C-Team, B. Trietch. National Grid, RIPUC re: data requests. Monitor same for response requirements.	1.00	\$275.00	\$275.00
Service	12/07/2020	Emails: RIPUC Attorney Harrington, C-Team, B. Trietch re: Exhibit List for Docket #5076. Review same. National Grid, Attorney Harrington re: data requests and response. Monitor same for relevance.	0.90	\$275.00	\$247.50
Service	12/07/2020	Appearance: RIPUC Hearing on Docket #5076.	5.00	\$275.00	\$1,375.00
Service	12/08/2020	Emails: National Grid re: responses to data requests for docket #5076.	0.30	\$275.00	\$82.50
Service	12/09/2020	Appearance: Virtual RIPUC hearing Docket #5076.	6.20	\$275.00	\$1,705.00
Service	12/10/2020	Emails: RIPUC Attorney, C-Team re: testimony.	0.60	\$275.00	\$165.00
				Subtotal	\$7,507.50

15-0001 □

EERMC Client Trust □unds management.

Type	Date	Notes	Quantity	Rate	Total
Service	12/10/2020	Attention to file re: Money Market October statement, interest earned. Update client IOLTA account spreadsheet. Email same to B. Trietch, N. Cleveland.	0.60	\$275.00	\$165.00

Invoice # 706 - 12/10/2020

Subtotal **\$165.00**

Total **\$7,672.50**

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
706	01/09/2021	\$7,672.50	\$0.00	\$7,672.50
Outstanding Balance				\$7,672.50
Total Amount Outstanding				\$7,672.50

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

INVOICE

Invoice # 726
Date: 02/11/2021
Due On: 03/13/2021

Type	Date	Notes	Quantity	Rate	Total
Service	01/12/2021	Emails: N. Cleveland re: Farm Fellow contract.	0.20	\$275.00	\$55.00
Service	01/13/2021	Attention to PUC emails, scheduling conference. Emails with C-Team re: same.	0.40	\$275.00	\$110.00
Service	01/14/2021	Correspondences: RIPUC docket 5080 counsel re: procedural schedule. C-Team re: same. B. Trietch re: meeting materials. Review same.	0.70	\$275.00	\$192.50
Service	01/15/2021	Review, revise Farm Fellow contract. Forward same to OER. Attention to previous version.	1.20	\$275.00	\$330.00
Service	01/19/2021	Attention to Docket 5080 Procedural Schedule. Calendar same.	0.20	\$275.00	\$55.00
Service	01/20/2021	Emails: C-Team, B. Trietch re: docket 5080. Attention to service list and schedule.	0.40	\$275.00	\$110.00
Service	01/22/2021	Drafting documents: Notice of Participation in docket 5080. Review docket. E-file and serve.	1.00	\$275.00	\$275.00
Service	01/22/2021	RIPUC Open Meeting for EE Docket for PIM. Review materials from Attorney Harrington.	1.80	\$275.00	\$495.00
Service	01/27/2021	Emails: RIPUC Attorney Harrington, C-Team re: docket 5080. Attention to hearings.	0.40	\$275.00	\$110.00
Service	01/28/2021	Emails: RIPUC Attorney Harrington, C-Team re: PIM technical session.	0.30	\$275.00	\$82.50
Service	02/03/2021	Attention to agenda and request from RIPUC Attorney Harrington re: technical session. Emails with C-Team	0.70	\$275.00	\$192.50

re: same.

Service	02/04/2021	Appearance: RIPUC Technical Session for PIM.	3.50	\$275.00	\$962.50
				Subtotal	\$2,170.00

15-0001

EERMC Client Trust Funds management.

Type	Date	Notes	Quantity	Rate	Total
Service	01/13/2021	Set up check printing from Money Market Account. Payment for URI. Reconcile IOLTA client account.	0.50	\$275.00	\$137.50
Expense	01/13/2021	Reimbursable expenses: Postage	1.00	\$0.50	\$0.50
Service	02/05/2021	Deposit National Grid check with teller for Money Market account. Update and balance client spreadsheet.	0.50	\$275.00	\$137.50
Expense	02/10/2021	Reimbursable expenses: Postage	1.00	\$0.51	\$0.51
Expense	02/10/2021	Reimbursable expenses: Postage	1.00	\$0.51	\$0.51
Service	02/10/2021	Set up check printing from Money Market Account. Two invoice payments. Reconcile IOLTA client account.	0.70	\$275.00	\$192.50
				Subtotal	\$610.02
				Total	\$3,310.02

Detailed Statement of Account

Other Invoices

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
718	02/11/2021	\$6,682.50	\$2,484.27	\$4,198.23

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
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Invoice # 726 - 02/11/2021

726	03/13/2021	\$3,439.02	\$0.00	\$3,439.02	
				Outstanding Balance	\$7,637.25
				Total Amount Outstanding	\$7,637.25

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	02/11/2021	Emails: RIPUC Attorney Harrington re: record requests for docket 5076. Review same.	0.20	\$275.00	\$55.00
Service	02/15/2021	Attention to power point materials for open meeting. Emails on same with RIPUC Attorney Harrington.	0.50	\$275.00	\$137.50
Service	02/15/2021	Meeting: RIPUC virtual open meeting on PIM.	0.90	\$275.00	\$247.50
Service	02/15/2021	Emails: C- Team, RIPUC Attorney Harrington re: request for comment and meeting.	0.50	\$275.00	\$137.50
Service	02/16/2021	Attention to filing and deadlines for docket 5080. Phone call with M. Guerard re: pending PUC dockets. Zoom meeting with PUC for docket 5076.	1.10	\$275.00	\$302.50
Service	02/16/2021	Correspondences: PUC staff regarding update on notice of party filing.	0.40	\$100.00	\$40.00
Service	02/17/2021	Attention to notice for PUC Docket #5076.	0.20	\$275.00	\$55.00
Service	02/18/2021	Emails: RIPUC re: comments for PIM. Review same, and attachments. B. Trietch re: materials for meeting. Review same.	0.80	\$275.00	\$220.00
Service	02/18/2021	Review of documents: Reviewed email from PUC Commission and added new filings to client file.	0.30	\$100.00	\$30.00
Service	02/19/2021	Attention to filed documents and appropriate dates.	0.20	\$100.00	\$20.00
Service	02/23/2021	Attention to Notice for PUC Docket #5076 and deadline for filing in PUC Docket #5080. Emails with C-Team, objector party re: same.	0.90	\$275.00	\$247.50

INVOICE

Invoice # 739
Date: 03/10/2021
Due On: 04/09/2021

Invoice # 739 - 03/10/2021

Service	02/24/2021	Correspondences: PUC Attorney Harrington, B. Trietch, C-Team re: PIM meeting, comments for PUC dockets.	1.60	\$275.00	\$440.00
Service	02/25/2021	Emails: C-Team re: comments for Docket #5080.	0.40	\$275.00	\$110.00
Service	02/26/2021	Review comments from EERMC for PUC Docket #5080. Revise cover letter for submittal and include comments. Emails with C-Team re: same.	0.70	\$275.00	\$192.50
Service	02/26/2021	Filed Memo with PUC re: docket 5080	0.30	\$100.00	\$30.00
Service	02/27/2021	Emails: Service list for PUC Docket #5080 re: comments. Attorney Handy, M. Guerard re: SRP.	0.80	\$275.00	\$220.00
Service	03/03/2021	Reviewed online PUC Docket #5080 and updated Dropbox file with new filings.	0.30	\$100.00	\$30.00
Service	03/04/2021	Attention to recently filed material in docket; reviewed and summarize public comment and objections.	2.00	\$100.00	\$200.00
Service	03/08/2021	Attention to Energy Fellow contract.	0.30	\$275.00	\$82.50
Service	03/10/2021	Review of Energy Fellow contract. Emails with N. Cleveland, Attorney MD re: same.	0.50	\$100.00	\$50.00

Total **\$2,117.50**

Detailed Statement of Account

Other Invoices

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
726	03/13/2021	\$3,439.02	\$0.00	\$3,439.02

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
739	04/09/2021	\$2,847.50	\$0.00	\$2,847.50
Outstanding Balance				\$6,286.52
Total Amount Outstanding				\$6,286.52

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	03/12/2021	Attention to March meeting agenda and materials.	0.20	\$275.00	\$55.00
Service	03/18/2021	Emails: C-Team re: comments for filing with PUC.	0.30	\$275.00	\$82.50
Service	03/19/2021	Draft, finalize and file submittal for comments in docket #5076. Copy service list.	0.50	\$275.00	\$137.50
Service	03/23/2021	Drafting documents: Begin drafting Comment submission summary for Attorney MD review.	1.80	\$100.00	\$180.00
Service	03/24/2021	Drafting documents: Completed summary of National Grid's submitted comments for Attorney MD.	0.60	\$100.00	\$60.00
Service	03/24/2021	Drafting documents: Begin review and drafting summary of Division comments submitted on docket 5076 for Attorney MD review.	0.70	\$100.00	\$70.00
Service	03/25/2021	Drafting documents: Continued to summarize comments in Docket 5076.	0.40	\$100.00	\$40.00
Service	04/06/2021	Drafting documents: Completed summary of The Divisions response re: EE PIM Docket 5076 for Attorney MD review.	1.50	\$100.00	\$150.00
Service	04/07/2021	Drafting documents: Completed Summary of OER comment for Attorney MD review.	0.60	\$100.00	\$60.00
				Subtotal	\$ 35.00

15-0001 ☐

EERMC Client Trust ☐unds management.

Type	Date	Notes	Quantity	Rate	Total
Service	03/12/2021	Attention to file re: Money Market January and February statements, interest earned. Update client IOLTA account spreadsheet. Email same to B. Trietch, N. Cleveland.	0.80	\$275.00	\$220.00
				Subtotal	\$220.00
				Total	\$1,055.00

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
753	05/12/2021	\$1,055.00	\$0.00	\$1,055.00
			Outstanding Balance	\$1,055.00
			Total Amount Outstanding	\$1,055.00

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



Invoice

Bill To:
National Grid
Attn: Matthew Ray, Customer Energy Management, RI
280 Melrose Street
Providence, RI 02907

Date	Invoice No.
5/11/2021	FPS-1

Item	Description	Quantity	Rate	Amount
	Future Market Potential Study Allocation	1	\$	\$100,000.00

Total	\$100,000.00
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Backup Documentation Attached to this Invoice:

Please make all checks payable in U.S.funds to:
State of Rhode Island
Energy Efficiency and Resource Management Council

Please mail all payments and contracts to:
Desautel Law
Attn: Marisa Desautel
38 Bellevue Avenue, Unit H
Newport, RI 02840



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

INVOICE

Invoice # 766
Date: 05/10/2021
Due On: 06/09/2021

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	04/15/2021	Emails: B. Trietch re: Executive Committee and agenda materials. Review same.	0.40	\$275.00	\$110.00
Service	04/22/2021	Emails: B. Trietch re: agenda materials. Review same. RIPUC Attorney Harrington re: docket 5076 Data Request. Review same.	0.70	\$275.00	\$192.50
Service	04/29/2021	Appearance: Attended PUC Open meeting.	2.50	\$100.00	\$250.00
Service	04/29/2021	Drafting documents: Drafted summarization of open meeting notes into a memo for attorney MD	1.00	\$100.00	\$100.00
Service	05/05/2021	Emails: National Grid re: filings for PUC docket 4770 and 4979. Review filings.	0.40	\$275.00	\$110.00
				Subtotal	\$762.50

15-0001

EERMC Client Trust unds management.

Type	Date	Notes	Quantity	Rate	Total
Service	04/27/2021	Correspondences: Attention to emails and calendared dates.	0.40	\$100.00	\$40.00
Service	05/04/2021	Attention to file re: Money Market March statement, interest earned. Update client IOLTA account spreadsheet.	0.60	\$275.00	\$165.00

Email same to N. Cleveland.					
Service	05/10/2021	Attention to file re: Money Market March statement, interest earned. Update client IOLTA account spreadsheet. Email same to N. Cleveland.	0.60	\$275.00	\$165.00
				Subtotal	\$370.00
				Total	\$1,132.50

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due	
766	06/09/2021	\$1,132.50	\$0.00	\$1,132.50	
				Outstanding Balance	\$1,132.50
				Total Amount Outstanding	\$1,132.50

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	05/18/2021	Meeting: Virtual re: bid protest.	0.20	\$275.00	\$55.00
Service	05/21/2021	Review Confidential Memo and draft response letter from OER. Emails with client re: same.	0.70	\$275.00	\$192.50
Service	05/26/2021	Attention to EE filing with PUC.	0.40	\$275.00	\$110.00
Service	05/27/2021	Drafted cover letter and attention to edits. Emailed with Attorney Desautel regarding the same.	0.40	\$100.00	\$40.00
Service	05/28/2021	Filing of Documents: Filed year end report for docket 5080- discussed with Attorney MD.	0.50	\$100.00	\$50.00
Service	06/01/2021	Attention to Executive Committee meeting materials.	0.20	\$275.00	\$55.00
Service	06/01/2021	Filing of Documents: Circulated EERMC comment letter to all on service list for Docket 5080.	0.40	\$100.00	\$40.00
Service	06/02/2021	Review of documents: Preliminary contracts review for Attorney MD.	0.80	\$100.00	\$80.00
Service	06/03/2021	Emails: Attention to conference notice, calendared for Attorney MD.	0.30	\$100.00	\$30.00
Service	06/03/2021	Meeting: Executive Committee virtual meeting.	1.00	\$275.00	\$275.00
Service	06/04/2021	Attention to RIPUC procedural scheduling meeting for SRP docket. Conference call on same. Follow up with C-Team re: technical session.	0.50	\$275.00	\$137.50
Service	06/08/2021	Emails: C-Team, RIPUC re: technical session.	0.30	\$275.00	\$82.50

INVOICE

Invoice # 776
Date: 06/11/2021
Due On: 07/11/2021

Invoice # 776 - 06/11/2021

Service	06/09/2021	Attention to RIPUC procedural schedule. Emails with C-Team on same.	0.40	\$275.00	\$110.00
Service	06/09/2021	Attention to RIPUC deadlines and calendar same.	0.30	\$100.00	\$30.00
Service	06/11/2021	Finalize review of Event Contract and Video Contract, updated Proposals and supporting materials. Forward revisions to B. Trietch.	1.40	\$275.00	\$385.00
				Subtotal	\$1,672.50

15-0001 □

EERMC Client Trust □unds management.

Type	Date	Notes	Quantity	Rate	Total
Service	06/11/2021	Attention to file re: Money Market March statement, interest earned. Update client IOLTA account spreadsheet. Email same to N. Cleveland.	0.60	\$275.00	\$165.00
				Subtotal	\$165.00
				Total	\$1,837.50

Detailed Statement of Account

Other Invoices

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
766	06/09/2021	\$1,132.50	\$0.00	\$1,132.50

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due	
776	07/11/2021	\$1,837.50	\$0.00	\$1,837.50	
				Outstanding Balance	\$2,070.00
				Total Amount Outstanding	\$2,070.00

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

INVOICE

Invoice # 788
Date: 07/12/2021
Due On: 08/11/2021

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	06/15/2021	Review of documents: Received and reviewed RIPUC docket filed materials for identification for Attorney MD.	0.20	\$225.00	\$45.00
Service	06/15/2021	Attention to SRP filings, meeting agenda and materials.	0.60	\$275.00	\$165.00
Service	06/22/2021	Attention to revised contracts.	0.20	\$275.00	\$55.00
Service	06/22/2021	Review of documents: Reviewed contracts and forwarded summary of changes to Attorney MD.	0.50	\$225.00	\$112.50
Service	06/23/2021	Review responses on contracts, cost proposals. Emails with OER re: same.	0.80	\$275.00	\$220.00
Service	06/24/2021	Emails: OER, PUC re: Motion for Extension of Time in PUC docket 5080. Review same.	0.50	\$275.00	\$137.50
Service	06/30/2021	Review and revise contract with OER changes. Review previous contracts for copyright language.	0.80	\$275.00	\$220.00
Service	07/07/2021	Emails: B. Trietch re: GBRI contract. Review same.	0.40	\$275.00	\$110.00
Service	07/09/2021	Emails with B. Trietch re: D/S contract. Revise to reflect copyright issues. Review previous versions.	0.50	\$275.00	\$137.50
				Subtotal	\$1,202.50

15-0001

EERMC Client Trust unds management.

Type	Date	Notes	Quantity	Rate	Total
Service	07/12/2021	Attention to file re: Money Market March statement, interest earned. Update client IOLTA account spreadsheet. Email same to N. Cleveland.	0.60	\$275.00	\$165.00
				Subtotal	\$165.00
				Total	\$1,367.50

Detailed Statement of Account

Other Invoices

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
766	06/09/2021	\$1,132.50	\$0.00	\$1,132.50
776	07/11/2021	\$1,837.50	\$0.00	\$1,837.50

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due	
788	08/11/2021	\$1,367.50	\$0.00	\$1,367.50	
				Outstanding Balance	\$1,337.50
				Total Amount Outstanding	\$1,337.50

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

INVOICE

Invoice # 793
Date: 08/10/2021
Due On: 09/09/2021

Type	Date	Notes	Quantity	Rate	Total
Service	07/15/2021	Emails: RIPUC re: final decision for PIM docket #4770. Review same.	0.40	\$275.00	\$110.00
Service	07/16/2021	Emails: RIPUC re: filings for docket. Review same. B. Trietch re: National Grid EE Plan.	0.40	\$275.00	\$110.00
Service	07/20/2021	Emails: Reviewed email sent from RIPUC and attachments.	0.50	\$225.00	\$112.50
Service	07/21/2021	Emails: RIPUC re: technical session for docket #5080. Attention to docket materials and preparation with experts.	0.40	\$275.00	\$110.00
Service	07/21/2021	Emails: Reviewed Tech session memo and drafted summary memo for Attorney MD.	0.30	\$225.00	\$67.50
Service	07/21/2021	Drafting documents: Reached out to expert witnesses in matter to touch base regarding upcoming tech session.	0.30	\$225.00	\$67.50
Service	07/22/2021	Emails: C-Team re: Docket 5080 regarding upcoming tech session on 7/26.	0.20	\$225.00	\$45.00
Service	07/23/2021	Emails: B. Trietch re: attention to July meeting materials. RIPUC re: open meetings. Review notices. National Grid responses to DR, Tech Session materials.	1.10	\$275.00	\$302.50
Service	07/26/2021	Appearance: SRP docket technical session at PUC.	5.70	\$275.00	\$1,567.50
Service	07/29/2021	Emails: Service list for docket 4770 re: Data Requests. Review same.	0.40	\$275.00	\$110.00

Invoice # 793 - 08/10/2021

Service	07/30/2021	Emails: Service list for docket 4770 re: tariff filing/ procedural conference, and docket 5076 re: Data Requests. Review same.	0.80	\$275.00	\$220.00
Service	08/04/2021	Emails w/B. Trietch re: PUC workshop. Attention to client deposit for Money Market Account.	0.50	\$275.00	\$137.50
Service	08/10/2021	Attention to Open Meeting notice from RIPUC.	0.40	\$275.00	\$110.00
				Subtotal	\$3,070.00

15-0001 □

EERMC Client Trust □unds management.

Type	Date	Notes	Quantity	Rate	Total
Service	08/04/2021	Deposit National Grid check with teller for Money Market account. Update and balance client spreadsheet.	0.50	\$275.00	\$137.50
Service	08/10/2021	Attention to file re: Money Market July statement, interest earned. Update client IOLTA account spreadsheet. Email same to N. Cleveland.	0.60	\$275.00	\$165.00
				Subtotal	\$302.50
				Total	\$3,372.50

Detailed Statement of Account

Other Invoices

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
776	07/11/2021	\$1,837.50	\$0.00	\$1,837.50
788	08/11/2021	\$1,367.50	\$0.00	\$1,367.50

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
793	09/09/2021	\$3,372.50	\$0.00	\$3,372.50

Invoice # 793 - 08/10/2021

Outstanding Balance	\$6,577.50
Total Amount Outstanding	\$6,577.50

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

Type	Date	Notes	Quantity	Rate	Total
Service	08/13/2021	Emails: Attention to meeting agenda and logistics.	0.20	\$275.00	\$55.00
Service	08/13/2021	Emails: Meeting materials. Review same.	0.20	\$275.00	\$55.00
Service	08/20/2021	Emails: National Grid re: data requests for docket 4770. Review same.	0.20	\$275.00	\$55.00
Service	08/26/2021	Review of documents: Review of new filings and brief summary to attorney MD.	0.40	\$225.00	\$90.00
Service	08/30/2021	Emails: P. Case re: EE Plan. N. Cleveland re: meetings.	0.50	\$275.00	\$137.50
Service	09/01/2021	Correspondences: N. Cleveland, M. Guerard re: EE Plan.	0.80	\$275.00	\$220.00
Service	09/03/2021	Meeting: Virtual with N. Cleveland, M. Guerard re: LCP. Prepare for same.	1.00	\$275.00	\$275.00
Service	09/08/2021	Emails: Attention to PUC filings in dockets.	0.40	\$275.00	\$110.00
Service	09/13/2021	Correspondences: M. Guerard, N. Cleveland re: EE Plan options. N. Cleveland re: EE Plan. Attention to state law. RIPUC Attorney Frias.	1.00	\$275.00	\$275.00
Service	09/13/2021	Review and revise K12 contract and attachments. Emails with N. Cleveland re: same.	0.80	\$275.00	\$220.00
Service	09/14/2021	Correspondences: RIPUC Attorney Frias re: potential procedures. N. Cleveland, M. Guerard re: options after vote.	0.80	\$275.00	\$220.00

INVOICE

Invoice # 803
Date: 09/14/2021
Due On: 10/14/2021

Subtotal \$1,712.50

15-00018

EERMC Client Trust Funds management.

Type	Date	Notes	Quantity	Rate	Total
Service	09/14/2021	Attention to file re: Money Market July statement, interest earned. Update client IOLTA account spreadsheet. Email same to N. Cleveland.	0.60	\$275.00	\$165.00
Subtotal					\$165.00
Total					\$1,877.50

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
803	10/14/2021	\$1,877.50	\$0.00	\$1,877.50
Outstanding Balance				\$1,877.50
Total Amount Outstanding				\$1,877.50

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

INVOICE

Invoice # 812
Date: 10/12/2021
Due On: 11/11/2021

Type	Date	Notes	Quantity	Rate	Total
Service	09/15/2021	Telephone communications: Client re: EE Plan vote and options.	0.50	\$275.00	\$137.50
Service	09/16/2021	Emails: Client re: EE Plan options.	0.30	\$275.00	\$82.50
Service	09/16/2021	Review Consultant Team memo re: EE Plan review. Emails with client re: same.	0.50	\$275.00	\$137.50
Service	09/17/2021	Emails: C-Team, client re: voting questions and process.	0.90	\$275.00	\$247.50
Service	09/20/2021	Emails: N. Ucci, C-Team re: strategy for EE vote.	0.60	\$275.00	\$165.00
Service	09/21/2021	Attention to EERMC meeting and materials, pre-meeting.	0.30	\$275.00	\$82.50
Service	09/21/2021	Emails: Client, OER re: EE vote and materials.	0.40	\$275.00	\$110.00
Service	09/22/2021	Meeting: N. Cleveland, C-Team re: process for vote. Correspondences: Client re: vote.	1.80	\$275.00	\$495.00
Service	09/22/2021	Review PUC Order for docket 5076. Notes on same.	0.50	\$275.00	\$137.50
Service	09/23/2021	Correspondences: Client, OER re: vote language and meeting. Attention to Standards.	1.60	\$275.00	\$440.00
Service	09/23/2021	Appearance: Meeting re: EE Plan.	3.00	\$275.00	\$825.00
Service	09/24/2021	Emails: Client, C-Team re: PUC filings for EE Plan vote. Review state law and Standards re: same.	1.00	\$275.00	\$275.00
Service	09/30/2021	Emails: C-Team, OER re: EE Plan and meetings. Attention to same.	0.20	\$275.00	\$55.00

Invoice # 812 - 10/12/2021

Service	10/05/2021	Emails: National Grid re: EE Plan. Review same. N. Cleveland re: strategy for meetings.	0.60	\$275.00	\$165.00
Service	10/07/2021	Emails: RIPUC, service list, National Grid re: EE Plan. Review same.	0.40	\$275.00	\$110.00
Service	10/12/2021	Correspondences: RIPUC and attorneys for docket re: EE Plan. C-Team re: schedule. Attention to notes.	0.50	\$275.00	\$137.50
				Subtotal	\$3,602.50

15-00018

EERMC Client Trust Funds management.

Type	Date	Notes	Quantity	Rate	Total
Service	10/12/2021	Attention to file re: Money Market September statement, interest earned. Update client IOLTA account spreadsheet. Email same to N. Cleveland.	0.60	\$275.00	\$165.00
				Subtotal	\$165.00
				Total	\$3,767.50

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
812	11/11/2021	\$3,767.50	\$0.00	\$3,767.50
			Outstanding Balance	\$3,767.50
			Total Amount Outstanding	\$3,767.50

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.



DESAUTEL LAW

38 BELLEVUE AVE, UNIT H
NEWPORT, RI 02840

RI Energy Efficiency Resource Management Council
EERMC and National Grid
PURCHASE ORDER #3200171172

15-00012

Legal Counsel to EERMC.

INVOICE

Invoice # 828
Date: 12/13/2021
Due On: 01/12/2022

Type	Date	Notes	Quantity	Rate	Total
Service	11/11/2021	Emails: Review file; e-mail counsel re Amended Procedural Schedule date changes; receipt, review, printing and filing of National Grid's responses to EERMC Set 1 (Batch 4), as well as previous filings.	1.00	\$225.00	\$225.00
Service	11/11/2021	Emails: Receipt and review of e-mails regarding CE Report 2022 missing from PUC Docket; e-mail to L. Massaro.	0.30	\$225.00	\$67.50
Service	11/12/2021	Review of documents: Receipt and review of e-mail from L. Massaro re: missing document from Docket (Cost-Effectiveness Report 2022 Energy Efficiency Plan); after using link provided, document does not appear; forward e-mail dated October 19, 2021 to Luly with both documents which were sent as original pds's for ease of clicking on embedded links in order for her to look into matter further and advise; receipt and review of e-mail from Luly Massaro indicating that she has added document to Docket; S. Ross re: having both documents have separate links; e-mail Luly Massaro requesting same; receipt and review of e-mail from Luly Massaro indicating that she will separate the documents with two separate links; e-mail to Same Ross indicating same.	0.80	\$225.00	\$180.00
Service	11/12/2021	Filing of Documents: Receipt and review of filing of National Grid's Response to PUC's First Set of Data Requests Bates Stamped; file same; receipt and review of National Grid's Response to Division's Second Set of Data Requests Bates Stamped; file same; receipt and review of National Grid's complete set of Responses to OER's First Set of Data Requests; file same.	0.70	\$225.00	\$157.50

Service	11/12/2021	Emails: S. Ross re: docket 5189 testimony. Attention to procedural schedule.	0.30	\$275.00	\$82.50
Service	11/12/2021	Review of documents: Receipt, review, and filing of Divisions Second Set of Data Requests to National Grid; receipt, review and filing of National Grid's Responses to divisions First Set of Data Requests; receipt, review and filing of National Grid's Technical Reference Manual for 2022 Program Year & Energy Efficiency Program Plan Studies.	0.40	\$225.00	\$90.00
Service	11/15/2021	Review of documents: Receipt and review of numerous documents in response to data requests for all, including excel files; print and file accordingly.	0.70	\$225.00	\$157.50
Service	11/15/2021	Attention to docket 5189 procedural schedule, discovery, testimony.	0.20	\$275.00	\$55.00
Service	11/16/2021	Emails: S. Ross re: prefiled testimony. Review file to share.	0.40	\$275.00	\$110.00
Service	11/16/2021	Drafting documents: Attention to materials for use at hearing.	0.30	\$225.00	\$67.50
Service	11/17/2021	Attention to testimony for filing; e-mails with consultant re same.	0.40	\$275.00	\$110.00
Service	11/18/2021	Attention to docket 4994 filing; correspondence with PUC counsel and consultant re: discovery.	0.80	\$275.00	\$220.00
Expense	11/18/2021	Reimbursable expenses: USPS Postage	1.00	\$8.08	\$8.08
Service	11/18/2021	Review of documents: Review of documents, in concert with e-mail from John Harrington; disable tracking of changes; reprinted documents and refiled with Rhode Island Public Utilities Commission.	0.60	\$225.00	\$135.00
Service	11/18/2021	Filing of Documents: Refiled EERMC's Intervenor's Pre-Filed Testimony due to two (2) instances in which "accept and stop tracking" did not function properly; refiled with Service List.	0.50	\$225.00	\$112.50
Service	11/19/2021	Emails: OER, consultant re: testimony and discovery.	0.40	\$275.00	\$110.00
Service	11/23/2021	Emails: PUC Attorney Harrington; marked calendar Procedural Conference.	0.20	\$225.00	\$45.00
Service	11/23/2021	Correspondences: Conference call with PUC. Follow up with C-Team. Emails from docket re: EE filings.	0.50	\$275.00	\$137.50
Service	11/24/2021	Correspondences: Attention to filings in docket. C-Team, Attorney for National Grid re: Data Requests. C-Team re: responses. Review DRs from PUC. Emails with C-Team re: same. PUC Attorney re: schedule details and discovery.	2.70	\$275.00	\$742.50
Service	11/24/2021	Drafting documents: Drafting of correspondence to	0.50	\$225.00	\$112.50

		Rhode Island Public Utilities Commission seeking an extension of time to file responses to First Set of Data Requests served upon EERMC by the PUC.			
Service	11/29/2021	Attention to OM notices, PUC filings for docket. Review DRs.	0.50	\$275.00	\$137.50
Service	11/29/2021	Review of documents: Receipt and review of PUC's Third Set of Data Requests to National Grid; file same.	0.20	\$225.00	\$45.00
Service	11/29/2021	Telephone communications: S. Ross re: strategy, Data Requests. PUC staff re: DR.	0.80	\$275.00	\$220.00
Service	11/29/2021	Emails: PUC docket re: hearings, DR deadlines. Attention to motion for extension. Review same for filing.	1.00	\$275.00	\$275.00
Service	11/30/2021	Correspondences: S. Ross re: Data Requests for docket 5189. Review same. Attention to Motion for Extension. PUC Attorney Harrington re: procedural schedule. Conference call re: procedure for docket.	1.60	\$275.00	\$440.00
Service	11/30/2021	Appearance: Technical Session re: docket 5080. Review file to prepare for same.	6.00	\$275.00	\$1,650.00
Service	11/30/2021	Drafting documents: Draft Motion for Extension of Time to file response to PUC's First Data Request served on November 24, 2021; file new updated Service List.	1.00	\$225.00	\$225.00
Service	11/30/2021	Filing of Documents: Finalizing and filing Motion for Extension of Time with PUC.	0.80	\$225.00	\$180.00
Expense	11/30/2021	Reimbursable expenses: Postage - PUC Extension Filing	1.00	\$3.16	\$3.16
Service	12/01/2021	Review, print, and file EERMC e-mail filings.	1.00	\$225.00	\$225.00
Service	12/01/2021	Review and revise DR response. Correspondence with C-Team re: same. Finalize response for submittal. File with PUC, service on docket.	1.20	\$275.00	\$330.00
Service	12/01/2021	Drafting documents: Drafting of correspondence to Rhode Island Public Utilities Commission taking into account client concerns.	0.40	\$225.00	\$90.00
Service	12/02/2021	Emails: Review, print, and file EERMC e-mail filings.	0.60	\$225.00	\$135.00
Service	12/02/2021	Emails: PUC Attorney, Team re: DR responses, hearing preparation.	0.70	\$275.00	\$192.50
Expense	12/02/2021	Reimbursable expenses: Postage	1.00	\$8.31	\$8.31
Service	12/02/2021	Filing of Documents: Copy, organize, and file original and nine (9) copies of EERMC's Responses to PUC's First Set of Data Requests Issued November 24, 2021	0.70	\$225.00	\$157.50

		via USPS.			
Service	12/03/2021	Telephone communications: C-Team re: hearing preparation. PUC, counsel re: procedure.	1.00	\$275.00	\$275.00
Service	12/03/2021	Correspondences: C-Team, PUC Attorney re: hearing. Client re: DR responses, meeting.	1.60	\$275.00	\$440.00
Service	12/03/2021	Preparation for Appearance: RIPUC hearing on EE docket.	0.40	\$275.00	\$110.00
Service	12/03/2021	Preparation for Appearance: Prepare file for hearing at Rhode Island Public Utilities Commission on Monday, December 6, 2021; review, print, and file additional discovery.	3.50	\$225.00	\$787.50
Service	12/06/2021	Appearance: Hearing for PUC docket #5189.	8.00	\$275.00	\$2,200.00
Service	12/07/2021	Correspondences: PUC Attorney Harrington, S. Ross re: hearing and strategy.	0.40	\$275.00	\$110.00
Service	12/08/2021	Appearance: RIPUC hearing on docket #5189.	8.50	\$275.00	\$2,337.50
Service	12/08/2021	Legal research: Print out Section 39-1-27.7 System reliability and least-cost procurement of Rhode Island General Laws to review for briefing of legal issue which came to light at hearing of Monday, December 6, 2021.	0.20	\$225.00	\$45.00
Service	12/10/2021	Telephone communications: C-Team re: issues from EE docket.	0.30	\$275.00	\$82.50

Total \$13,627.05

Detailed Statement of Account

Current Invoice

Invoice Number	Due On	Amount Due	Payments Received	Balance Due
828	01/12/2022	\$13,627.05	\$0.00	\$13,627.05
			Outstanding Balance	\$13,627.05
			Total Amount Outstanding	\$13,627.05

Please make all amounts payable to: DESAUTEL LAW

Please pay within 30 days.

Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Monday, February 24, 2020 11:44 AM
To: Ray, Matthew; Knight, James
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_536_APPROVED.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$1,760.50** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840).

Thanks,
Nathan



Nathan Cleveland
Programming Services Officer, Energy Efficiency
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
p. 401-574-9112 | f. 401-574-9125
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Monday, February 24, 2020 1:17 PM
To: Ray, Matthew; Knight, James
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7345 Rhode Island EERMC January 2020 Invoice_APPROVED.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of \$ **61,315.25** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan



Nathan Cleveland
Programming Services Officer, Energy Efficiency
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
p. 401-574-9112 | f. 401-574-9125
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Thursday, March 12, 2020 3:35 PM
To: Ray, Matthew; Knight, James
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_553_Approved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$2,724.50** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840).

Thanks,
Nathan



Nathan Cleveland
Programming Services Officer, Energy Efficiency
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
p. 401-574-9112 | f. 401-574-9125
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Thursday, April 2, 2020 2:52 PM
To: Ray, Matthew; Knight, James
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7345 Rhode Island EERMC February 2020 Invoice_Aproved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of \$ **84,272.48** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Friday, April 17, 2020 5:07 PM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_573_Approved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$6,521.10** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840).

Thanks,
Nathan

Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Friday, April 17, 2020 5:09 PM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7345 Rhode Island EERMC March 2020 Invoice from Optimal Energy_Aproved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of \$ **84,880.98** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Thursday, May 14, 2020 4:06 PM
To: Ray, Matthew; Knight, James
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_584_APPROVED.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$4,216.50** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840).

Thanks,
Nathan

Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Monday, May 18, 2020 1:23 PM
To: Ray, Matthew; Knight, James
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7345 Rhode Island EERMC April 2020 Invoice from Optimal Energy_APPROVED.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of \$ **91,364.98** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Thursday, June 11, 2020 9:20 AM
To: Ray, Matthew; Knight, James
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_605_APPROVED.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$962.50** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840).

Thanks,
Nathan

Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Wednesday, July 15, 2020 3:01 PM
To: Ray, Matthew; Knight, James
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7345 Rhode Island EERMC June 2020 Invoice from Optimal Energy_Approved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$90,849.73** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Friday, August 14, 2020 1:58 PM
To: Ray, Matthew; Knight, James
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7345 Rhode Island EERMC July 2020 Invoice from Optimal Energy_Aproved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$64,427.48** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Thursday, September 3, 2020 2:50 PM
To: Knight, James
Cc: Trietch, Becca (DOA); Ray, Matthew; Marisa Desautel
Subject: Re: [EXTERNAL] : RE: EXT || EERMC Invoice Approved
Attachments: Invoice No 92761_Approved.pdf

Hi Jim,

Thanks for that reminder, and good point, much more efficient for you to pay us rather than onboard a new vendor.

Could you instead make that check for \$956.21 payable to the EERMC and send it to our lawyer, Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840)?

Marisa, when this check for \$956.21 arrives from National Grid can you please deposit it in the client fund and then pay the vendor for printing the EERMC Annual reports, Allegra? The invoice with address is attached here for your reference as well.

Thanks all,
Nathan

From: Knight, James <James.Knight2@nationalgrid.com>
Sent: Thursday, September 3, 2020 12:25 PM
To: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Cc: Trietch, Becca (DOA) <Becca.Trietch@energy.ri.gov>; Ray, Matthew <Matthew.Ray2@nationalgrid.com>
Subject: [EXTERNAL] : RE: EXT || EERMC Invoice Approved

Hi Nathan,

Something I have in my notes from our end of year discussion last year is if we paid you directly for the printing you would then be able to pay then the vendor. Its just we would need to go through the process of onboarding Allegra just for a onetime payment and it seems more efficient if we could just pay this out directly.

--Jim

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Thursday, September 03, 2020 11:13 AM
To: Knight, James <James.Knight2@nationalgrid.com>; Ray, Matthew <Matthew.Ray2@nationalgrid.com>
Cc: Trietch, Becca (DOA) <Becca.Trietch@energy.ri.gov>; Rachel Sholly <rachel.sholly@gmail.com>
Subject: EXT || EERMC Invoice Approved

Hi Matt and Jim,

I approved of the attached invoice on behalf of the EERMC for printing of the annual reports. Could you please pay **Allegra \$956.21 (102 Waterman Street, Providence, RI 02906)**.

Thanks,
Nathan

This e-mail, and any attachments are strictly confidential and intended for the addressee(s) only. The content may also contain legal, professional or other privileged information. If you are not the intended recipient, please notify the sender immediately and then delete the e-mail and any attachments. You should not disclose, copy or take any action in reliance on this transmission.

You may report the matter by contacting us via our [UK Contacts Page \[nationalgrid.com\]](#) or our [US Contacts Page \[nationalgridus.com\]](#) (accessed by clicking on the appropriate link)

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For the registered information on the UK operating companies within the National Grid group please use the attached link: [https://www.nationalgrid.com/group/about-us/corporate-registrations \[nationalgrid.com\]](https://www.nationalgrid.com/group/about-us/corporate-registrations)

Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Thursday, August 20, 2020 11:02 AM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_637_Approved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$2,246.47** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840).

Thanks,
Nathan

Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Friday, September 11, 2020 11:17 AM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_652_Approved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$5,032.50** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840).

Thanks,
Nathan

Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Tuesday, September 15, 2020 4:19 PM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7345 Rhode Island EERMC August 2020 Invoice from Optimal Energy_Approved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$82,571.73** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Tuesday, October 13, 2020 11:16 AM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_670_Approved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$4,950.50** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities

Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)

Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Tuesday, October 13, 2020 11:18 AM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7345 Rhode Island EERMC September 2020 Invoice from Optimal Energy_Approved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$102,836.23** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Friday, November 13, 2020 9:51 AM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7345 Rhode Island EERMC October 2020 Invoice from Optimal Energy_Approved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$64,302.48** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
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1 Capitol Hill, 4th Floor, Providence, RI 02908
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Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Friday, November 13, 2020 9:49 AM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_688_OCT 2020_Approved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$2,238.66** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities

Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)

Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Monday, December 14, 2020 11:23 AM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_706_Approved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$7,672.50** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities

Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)

Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Tuesday, February 23, 2021 1:54 PM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_726_APPROVED.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$3,439.02** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Wednesday, March 3, 2021 11:01 AM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7395 RI EERMC January 2021 Invoice from Optimal Energy_Approved.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$43,928.25** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Saturday, March 20, 2021 2:32 PM
To: Ray, Matthew; Knight, James
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7395 RI EERMC February 2021 Invoice from Optimal Energy_APPROVED.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$53,846.75** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Saturday, March 13, 2021 3:38 PM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_739_APPROVED.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$2,847.50** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Tuesday, April 13, 2021 3:58 PM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_753_March 2021_APPROVED.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$1,055.00** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
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1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Friday, April 23, 2021 6:57 AM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7395 RI EERMC March 2021 Invoice from Optimal Energy_APPROVED.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$53,995.00** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Friday, May 21, 2021 2:34 PM
To: Knight, James; Ray, Matthew
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7395 RI EERMC April 2021 Invoice from Optimal Energy_APPROVED.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$55,757.50** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Tuesday, July 13, 2021 10:34 AM
To: Knight, James
Cc: Ray, Matthew; Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_788_June 2021_APPROVED.pdf

Hi Matt and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$1,367.50** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840). Please let me know if you have any questions.

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Wednesday, July 28, 2021 3:24 PM
To: Knight, James; Ray, Matthew; Li, Angela
Cc: Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: 7395 RI EERMC June 2021 Invoice from Optimal Energy_APPROVED.pdf

Hi Matt, Angela, and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$60,638.75** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Thursday, August 12, 2021 4:13 PM
To: Knight, James; Ray, Matthew
Cc: Li, Angela; Trietch, Becca (DOA)
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_793_July 2021_APPROVED.pdf

Hi Matt, Angela, and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$3,372.50** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840). Please let me know if you have any questions.

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Wednesday, August 18, 2021 3:33 PM
To: Knight, James; Ray, Matthew; Li, Angela
Subject: EXT || EERMC Invoice Approved
Attachments: 7395 RI EERMC July 2021 Invoice from Optimal Energy_APPROVED.pdf

Hi Matt, Angela, and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$74,118.25** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Tuesday, September 14, 2021 4:14 PM
To: Ray, Matthew; Li, Angela; Knight, James
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_803_August 2021_APPROVED.pdf

Hi Matt, Angela, and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$1,877.50** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840). Please let me know if you have any questions.

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Monday, October 4, 2021 2:47 PM
To: Knight, James
Cc: Ray, Matthew; Li, Angela
Subject: EXT || EERMC Invoice Approved
Attachments: 7395 RI EERC Aug 2021_APPROVED.pdf

Hi Matt, Angela, and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$70,198.50** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Friday, October 15, 2021 3:15 PM
To: Knight, James
Cc: Ray, Matthew; Li, Angela
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_812_Sept 2021_APPROVED.pdf

Hi Matt, Angela, and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$3,767.50** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840). Please let me know if you have any questions.

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Friday, November 12, 2021 10:45 AM
To: Knight, James
Cc: Li, Angela; Ray, Matthew
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_820_Oct 2021_APPROVED.pdf

Hi Angela, and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$7,846.01** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840). Please let me know if you have any questions.

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Friday, November 12, 2021 11:58 AM
To: Knight, James; Li, Angela
Subject: EXT || EERMC Invoice Approved
Attachments: 7395 RI EERMC Sept 2021 Invoice Invoice from Optimal Energy_APPROVED.pdf; 7395 RI EERC Aug 2021_APPROVED.pdf

Hi Angela, and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$64,573.50** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Additionally, could you update me regarding the payment status Optimal's August invoice, approved for payment via email on 10/4/2021 and attached here for reference as well? They indicated this morning they have not seen that come through yet.

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Monday, November 29, 2021 11:54 AM
To: Knight, James; Li, Angela
Subject: EXT || EERMC Invoice Approved
Attachments: 7395 RI EERMC October 2021 Invoice from Optimal Energy_APPROVED.pdf

Hi Angela, and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$50,165.50** to Optimal Energy (10600 Route 116 Suite 3 Hinesburg, VT 05461).

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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Li, Angela

From: Cleveland, Nathan (DOA) <Nathan.Cleveland@energy.ri.gov>
Sent: Tuesday, December 14, 2021 9:18 PM
To: Knight, James; Li, Angela
Subject: EXT || EERMC Invoice Approved
Attachments: invoice_828_APPROVED.pdf

Hi Angela, and Jim,

I approve of the attached invoice on behalf of the EERMC. Please issue payment in the amount of **\$13,627.05** to Marisa Desautel at Desautel Law (38 BELLEVUE AVE, UNIT H NEWPORT, RI 02840). Please let me know if you have any questions.

Thanks,
Nathan

Nathan Cleveland (he/him)
Programming Services Officer
Energy Efficiency, Lead by Example & Municipalities
Rhode Island Office of Energy Resources
1 Capitol Hill, 4th Floor, Providence, RI 02908
401-574-9112 (office)
Nathan.Cleveland@energy.ri.gov | www.energy.ri.gov

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PUC 5-7

Request:

Referencing the response to PUC 3-6, please provide a summary table on a yearly basis going back to 2016 of all transfers to or payments on behalf of the EERMC. Please include a row summing up each year. Please also indicate on the table where the funds were transferred or paid.

Response:

Please see Attachment PUC 5-7 for an excel spreadsheet with the payments made on behalf of the EERMC.

The Company is currently undergoing an internal review of all invoices received and payments made dating back to 2016. The Company will notify the PUC if it finds any discrepancies as a result of this review.

Invoice Number	Vendor Name	Invoice Amount	Invoice Status	Invoice Status Date	Paid To	Additional Details
2016 EERMC Invoices						
108807	VERMONT ENERGY INVESTMENT CORP	\$3,328.63	Paid	2/3/2016	VERMONT ENERGY INVESTMENT CORP	Professional Services
109663	LAW OFFICE OF MARISA DESAUTEL LLC	\$2,005.00	Paid	3/8/2016	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC
110542	VERMONT ENERGY INVESTMENT CORP	\$17,811.27	Paid	3/24/2016	VERMONT ENERGY INVESTMENT CORP	Professional Services
110755	LAW OFFICE OF MARISA DESAUTEL LLC	\$3,905.00	Paid	3/29/2016	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
110754	VERMONT ENERGY INVESTMENT CORP	\$63,043.15	Paid	3/29/2016	VERMONT ENERGY INVESTMENT CORP	Professional Services
112566	LAW OFFICE OF MARISA DESAUTEL LLC	\$2,875.00	Paid	5/19/2016	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC
113077	VERMONT ENERGY INVESTMENT CORP	\$125,433.74	Paid	6/4/2016	VERMONT ENERGY INVESTMENT CORP	Professional Services
113076	VERMONT ENERGY INVESTMENT CORP	\$26,351.55	Paid	6/4/2016	VERMONT ENERGY INVESTMENT CORP	Professional Services
113639	LAW OFFICE OF MARISA DESAUTEL LLC	\$900.00	Paid	6/22/2016	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC
114342	VERMONT ENERGY INVESTMENT CORP	\$65,496.92	Paid	7/13/2016	VERMONT ENERGY INVESTMENT CORP	Professional Services
115925	VERMONT ENERGY INVESTMENT CORP	\$62,633.82	Paid	9/3/2016	VERMONT ENERGY INVESTMENT CORP	Professional Services
115923	VERMONT ENERGY INVESTMENT CORP	\$63,180.38	Paid	9/3/2016	VERMONT ENERGY INVESTMENT CORP	Professional Services
116080	LAW OFFICE OF MARISA DESAUTEL LLC	\$4,380.00	Paid	9/15/2016	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
116475	LAW OFFICE OF MARISA DESAUTEL LLC	\$1,550.00	Paid	9/21/2016	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC
117458	VERMONT ENERGY INVESTMENT CORP	\$84,795.07	Paid	10/21/2016	VERMONT ENERGY INVESTMENT CORP	Professional Services
117787	LAW OFFICE OF MARISA DESAUTEL LLC	\$1,075.00	Paid	11/3/2016	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
118446	VERMONT ENERGY INVESTMENT CORP	\$77,725.02	Paid	11/16/2016	VERMONT ENERGY INVESTMENT CORP	Professional Services
118921	LAW OFFICE OF MARISA DESAUTEL LLC	\$875.00	Paid	12/3/2016	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
118922	VERMONT ENERGY INVESTMENT CORP	\$74,690.48	Paid	12/3/2016	VERMONT ENERGY INVESTMENT CORP	Professional Services
119801	LAW OFFICE OF MARISA DESAUTEL LLC	\$3,200.00	Paid	12/20/2016	LAW OFFICE OF MARISA DESAUTEL LLC	Estimated Jan Feb 2017 legal services
119796	LAW OFFICE OF MARISA DESAUTEL LLC	\$3,425.00	Paid	12/20/2016	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
119954	VERMONT ENERGY INVESTMENT CORP	\$91,880.21	Paid	12/22/2016	VERMONT ENERGY INVESTMENT CORP	Professional Services
119952	VERMONT ENERGY INVESTMENT CORP	\$50,000.00	Paid	12/22/2016	VERMONT ENERGY INVESTMENT CORP	Professional Services - Estimated December Professional Services
120197	LAW OFFICE OF MARISA DESAUTEL LLC	\$194,102.76	Paid	1/6/2017	LAW OFFICE OF MARISA DESAUTEL LLC	Balance Transfer to EERMC client fund held by legal counsel
2016 Total Payments Issued to EERMC		\$1,024,663.00				
2017 EERMC Invoices						
121663	VERMONT ENERGY INVESTMENT CORP	\$7,799.28	Paid	2/23/2017	VERMONT ENERGY INVESTMENT CORP	Adjustment to December 2016 Professional Services
122364	LAW OFFICE OF MARISA DESAUTEL LLC	\$4,162.58	Paid	3/22/2017	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
121888	VERMONT ENERGY INVESTMENT CORP	\$63,170.11	Paid	3/22/2017	VERMONT ENERGY INVESTMENT CORP	Professional Services
123009	VERMONT ENERGY INVESTMENT CORP	\$44,044.61	Paid	4/7/2017	VERMONT ENERGY INVESTMENT CORP	Professional Services
123225	LAW OFFICE OF MARISA DESAUTEL LLC	\$2,172.65	Paid	4/13/2017	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC

123787	VERMONT ENERGY INVESTMENT CORP	\$126,982.37	Paid	5/3/2017	VERMONT ENERGY INVESTMENT CORP	Professional Services
124260	LAW OFFICE OF MARISA DESAUTEL LLC	\$2,100.00	Paid	5/17/2017	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
124696	VERMONT ENERGY INVESTMENT CORP	\$73,307.78	Paid	6/3/2017	VERMONT ENERGY INVESTMENT CORP	Professional Services
126431	LAW OFFICE OF MARISA DESAUTEL LLC	\$2,875.00	Paid	7/26/2017	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC
126430	LAW OFFICE OF MARISA DESAUTEL LLC	\$1,950.00	Paid	7/26/2017	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC
126433	VERMONT ENERGY INVESTMENT CORP	\$85,324.11	Paid	7/26/2017	VERMONT ENERGY INVESTMENT CORP	Professional Services
126897	VERMONT ENERGY INVESTMENT CORP	\$64,216.91	Paid	8/12/2017	VERMONT ENERGY INVESTMENT CORP	Professional Services
127632	VERMONT ENERGY INVESTMENT CORP	\$35,364.35	Paid	9/21/2017	VERMONT ENERGY INVESTMENT CORP	Professional Services
128743	VERMONT ENERGY INVESTMENT CORP	\$113,312.93	Paid	10/4/2017	VERMONT ENERGY INVESTMENT CORP	Professional Services
129118	LAW OFFICE OF MARISA DESAUTEL LLC	\$3,619.11	Paid	10/13/2017	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC
129493	VERMONT ENERGY INVESTMENT CORP	\$58,760.11	Paid	11/3/2017	VERMONT ENERGY INVESTMENT CORP	Professional Services
130697	VERMONT ENERGY INVESTMENT CORP	\$63,030.90	Paid	12/5/2017	VERMONT ENERGY INVESTMENT CORP	Professional Services
131411	LAW OFFICE OF MARISA DESAUTEL LLC	\$4,775.46	Paid	12/14/2017	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
132040	LAW OFFICE OF MARISA DESAUTEL LLC	\$3,017.69	Paid	12/23/2017	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
131549	VERMONT ENERGY INVESTMENT CORP	\$78,000.00	Paid	1/2/2018	VERMONT ENERGY INVESTMENT CORP	Professional Services - Estimated December Professional Services
131547	VERMONT ENERGY INVESTMENT CORP	\$63,561.61	Paid	1/2/2018	VERMONT ENERGY INVESTMENT CORP	Professional Services
132097	LAW OFFICE OF MARISA DESAUTEL LLC	\$208,574.54	Paid	1/23/2018	LAW OFFICE OF MARISA DESAUTEL LLC	Balance Transfer to EERMC client fund held by legal counsel
2017 Total Payments Issued to EERMC		\$1,110,122.10				
2018 EERMC Invoices						
134429	LAW OFFICE OF MARISA DESAUTEL LLC	\$2,801.15	Paid	3/10/2018	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
134520	OPTIMAL ENERGY INC	\$37,817.75	Paid	3/15/2018	OPTIMAL ENERGY INC	Professional Services
134856	OPTIMAL ENERGY INC	\$39,054.25	Paid	3/23/2018	OPTIMAL ENERGY INC	Professional Services
136097	OPTIMAL ENERGY INC	\$122,137.33	Paid	4/26/2018	OPTIMAL ENERGY INC	Professional Services
136166	LAW OFFICE OF MARISA DESAUTEL LLC	\$1,850.00	Paid	5/3/2018	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC
137162	OPTIMAL ENERGY INC	\$68,337.00	Paid	5/26/2018	OPTIMAL ENERGY INC	Professional Services
137654	LAW OFFICE OF MARISA DESAUTEL LLC	\$2,275.93	Paid	6/12/2018	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC
137648	LAW OFFICE OF MARISA DESAUTEL LLC	\$1,915.56	Paid	6/12/2018	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
138368	OPTIMAL ENERGY INC	\$60,962.75	Paid	7/4/2018	OPTIMAL ENERGY INC	Professional Services
139104	LAW OFFICE OF MARISA DESAUTEL LLC	\$2,296.55	Paid	8/3/2018	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC
139322	OPTIMAL ENERGY INC	\$41,747.50	Paid	8/3/2018	OPTIMAL ENERGY INC	Professional Services
141027	LAW OFFICE OF MARISA DESAUTEL LLC	\$5,220.96	Paid	9/15/2018	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
140184	OPTIMAL ENERGY INC	\$54,270.37	Paid	9/15/2018	OPTIMAL ENERGY INC	Professional Services
142088	LAW OFFICE OF MARISA DESAUTEL LLC	\$2,922.47	Paid	10/17/2018	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
142087	OPTIMAL ENERGY INC	\$83,979.00	Paid	10/17/2018	OPTIMAL ENERGY INC	Professional Services
142449	LAW OFFICE OF MARISA DESAUTEL LLC	\$4,039.85	Paid	11/6/2018	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC

142450	OPTIMAL ENERGY INC	\$75,932.75	Paid	11/6/2018	OPTIMAL ENERGY INC	Professional Services
143933	LAW OFFICE OF MARISA DESAUTEL LLC	\$2,248.43	Paid	12/8/2018	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
144313	LAW OFFICE OF MARISA DESAUTEL LLC	\$4,005.00	Paid	12/14/2018	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC
144773	LAW OFFICE OF MARISA DESAUTEL LLC	\$244,794.00	Paid	12/25/2018	LAW OFFICE OF MARISA DESAUTEL LLC	Balance Transfer to EERMC client fund held by legal counsel
143901	OPTIMAL ENERGY INC	\$54,325.00	Paid	1/4/2019	OPTIMAL ENERGY INC	Professional Services
144105	OPTIMAL ENERGY INC	\$51,262.50	Paid	1/10/2019	OPTIMAL ENERGY INC	Professional Services
2018 Total Payments Issued to EERMC		\$964,196.10				
2019 EERMC Invoices						
146802	LAW OFFICE OF MARISA DESAUTEL LLC	\$2,260.00	Paid	3/5/2019	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
148226	OPTIMAL ENERGY INC	\$38,420.00	Paid	4/13/2019	OPTIMAL ENERGY INC	Professional Services
148146	OPTIMAL ENERGY INC	\$53,411.25	Paid	4/13/2019	OPTIMAL ENERGY INC	Professional Services
148539	OPTIMAL ENERGY INC	\$79,455.52	Paid	4/25/2019	OPTIMAL ENERGY INC	Professional Services
151978	LAW OFFICE OF MARISA DESAUTEL LLC	\$3,192.00	Paid	5/21/2019	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
152427	OPTIMAL ENERGY INC	\$53,311.50	Paid	5/22/2019	OPTIMAL ENERGY INC	Professional Services
159732	LAW OFFICE OF MARISA DESAUTEL LLC	\$935.00	Paid	7/23/2019	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
159703	OPTIMAL ENERGY INC	\$67,336.35	Paid	7/23/2019	OPTIMAL ENERGY INC	Professional Services
159414	OPTIMAL ENERGY INC	\$64,428.75	Paid	7/23/2019	OPTIMAL ENERGY INC	Professional Services
164152	LAW OFFICE OF MARISA DESAUTEL LLC	\$962.50	Paid	8/24/2019	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
164758	OPTIMAL ENERGY INC	\$67,949.25	Paid	8/24/2019	OPTIMAL ENERGY INC	Professional Services
167394	LAW OFFICE OF MARISA DESAUTEL LLC	\$2,022.78	Paid	9/21/2019	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
168340	OPTIMAL ENERGY INC	\$89,919.25	Paid	10/3/2019	OPTIMAL ENERGY INC	Professional Services
170260	LAW OFFICE OF MARISA DESAUTEL LLC	\$2,696.00	Paid	10/25/2019	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
170255	OPTIMAL ENERGY INC	\$73,812.25	Paid	10/25/2019	OPTIMAL ENERGY INC	Professional Services
172036	LAW OFFICE OF MARISA DESAUTEL LLC	\$1,627.44	Paid	11/14/2019	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
172016	OPTIMAL ENERGY INC	\$84,274.75	Paid	11/14/2019	OPTIMAL ENERGY INC	Professional Services
174350	LAW OFFICE OF MARISA DESAUTEL LLC	\$7,402.82	Paid	12/18/2019	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
174349	OPTIMAL ENERGY INC	\$69,136.50	Paid	12/18/2019	OPTIMAL ENERGY INC	Professional Services
174669	LAW OFFICE OF MARISA DESAUTEL LLC	\$142,892.17	Paid	1/22/2020	LAW OFFICE OF MARISA DESAUTEL LLC	Balance Transfer to EERMC client fund held by legal counsel
2019 Total Payments Issued to EERMC		\$905,446.08				
2020 EERMC Invoices						
175794	LAW OFFICE OF MARISA DESAUTEL LLC	\$111,340.00	Paid	1/22/2020	Energy Efficiency Resource Management Council	Market Potential Study Vendor Compensation
177052	LAW OFFICE OF MARISA DESAUTEL LLC	\$1,760.50	Paid	3/6/2020	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
176499	LAW OFFICE OF MARISA DESAUTEL LLC	\$164,196.20	Paid	3/6/2020	Energy Efficiency Resource Management Council	Market Potential Study Vendor Compensation
176498	LAW OFFICE OF MARISA DESAUTEL LLC	\$40,000.00	Paid	3/6/2020	Energy Efficiency Resource Management Council	Future Market Potential Study Allocation
177082	OPTIMAL ENERGY INC	\$61,315.25	Paid	3/13/2020	OPTIMAL ENERGY INC	Professional Services

177878	LAW OFFICE OF MARISA DESAUTELE LLC	\$2,724.50	Paid	3/26/2020	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC includes mgmt of client trust fund
178686	OPTIMAL ENERGY INC	\$84,272.48	Paid	4/21/2020	OPTIMAL ENERGY INC	Professional Services
179095	LAW OFFICE OF MARISA DESAUTELE LLC	\$6,521.10	Paid	4/22/2020	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC includes mgmt of client trust fund
179845	LAW OFFICE OF MARISA DESAUTELE LLC	\$4,216.50	Paid	5/20/2020	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC includes mgmt of client trust fund
179096	OPTIMAL ENERGY INC	\$84,880.98	Paid	5/20/2020	OPTIMAL ENERGY INC	Professional Services
179912	OPTIMAL ENERGY INC	\$91,364.98	Paid	5/21/2020	OPTIMAL ENERGY INC	Professional Services
180542	LAW OFFICE OF MARISA DESAUTELE LLC	\$962.50	Paid	6/17/2020	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC includes mgmt of client trust fund
180568	OPTIMAL ENERGY INC	\$77,574.48	Paid	6/17/2020	OPTIMAL ENERGY INC	Professional Services
181215	LAW OFFICE OF MARISA DESAUTELE LLC	\$2,190.00	Paid	7/18/2020	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC
181307	OPTIMAL ENERGY INC	\$90,849.73	Paid	7/18/2020	OPTIMAL ENERGY INC	Professional Services
182065	OPTIMAL ENERGY INC	\$64,427.48	Paid	8/19/2020	OPTIMAL ENERGY INC	Professional Services
182176	LAW OFFICE OF MARISA DESAUTELE LLC	\$2,246.47	Paid	8/27/2020	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC includes mgmt of client trust fund
182607	LAW OFFICE OF MARISA DESAUTELE LLC	\$956.21	Paid	9/11/2020	Allegra Printing	Printing of EERMC Annual Report
182789	LAW OFFICE OF MARISA DESAUTELE LLC	\$5,032.50	Paid	10/3/2020	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC includes mgmt of client trust fund
182875	OPTIMAL ENERGY INC	\$82,571.73	Paid	10/3/2020	OPTIMAL ENERGY INC	Professional Services
183808	LAW OFFICE OF MARISA DESAUTELE LLC	\$4,950.50	Paid	10/16/2020	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC includes mgmt of client trust fund
183809	OPTIMAL ENERGY INC	\$102,836.23	Paid	10/16/2020	OPTIMAL ENERGY INC	Professional Services
184768	LAW OFFICE OF MARISA DESAUTELE LLC	\$2,238.66	Paid	11/18/2020	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC includes mgmt of client trust fund
184766	OPTIMAL ENERGY INC	\$64,302.48	Paid	11/18/2020	OPTIMAL ENERGY INC	Professional Services
185933	LAW OFFICE OF MARISA DESAUTELE LLC	\$7,672.50	Paid	12/16/2020	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC includes mgmt of client trust fund
185941	OPTIMAL ENERGY INC	\$48,049.48	Paid	12/16/2020	OPTIMAL ENERGY INC	Professional Services and website fees
186558	LAW OFFICE OF MARISA DESAUTELE LLC	\$156,786.56	Paid	1/15/2021	LAW OFFICE OF MARISA DESAUTELE LLC	Balance Transfer to EERMC client fund held by legal counsel
2020 Total Payments Issued to EERMC		\$1,366,240.00				
2021 EERMC Invoices						
188530	LAW OFFICE OF MARISA DESAUTELE LLC	\$3,439.02	Paid	3/3/2021	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC includes mgmt of client trust fund
188794	OPTIMAL ENERGY INC	\$43,928.25	Paid	3/5/2021	OPTIMAL ENERGY INC	Professional Services
189150	LAW OFFICE OF MARISA DESAUTELE LLC	\$2,847.50	Paid	3/17/2021	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC
189388	OPTIMAL ENERGY INC	\$53,846.75	Paid	3/26/2021	OPTIMAL ENERGY INC	Professional Services
190135	LAW OFFICE OF MARISA DESAUTELE LLC	\$1,055.00	Paid	4/16/2021	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC includes mgmt of client trust fund
190434	OPTIMAL ENERGY INC	\$53,995.00	Paid	4/28/2021	OPTIMAL ENERGY INC	Professional Services
192686	OPTIMAL ENERGY INC	\$73,041.50	Paid	7/9/2021	OPTIMAL ENERGY INC	Professional Services
192682	OPTIMAL ENERGY INC	\$55,757.50	Paid	7/9/2021	OPTIMAL ENERGY INC	Professional Services
190987	LAW OFFICE OF MARISA DESAUTELE LLC	\$100,000.00	Paid	7/24/2021	Energy Efficiency Resource Management Council	Future Market Potential Study Allocation
190985	LAW OFFICE OF MARISA DESAUTELE LLC	\$1,132.50	Paid	7/24/2021	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC includes mgmt of client trust fund
193303	OPTIMAL ENERGY INC	\$60,638.75	Paid	8/5/2021	OPTIMAL ENERGY INC	Professional Services
193588	LAW OFFICE OF MARISA DESAUTELE LLC	\$1,367.50	Paid	8/11/2021	LAW OFFICE OF MARISA DESAUTELE LLC	Legal Counsel to EERMC includes mgmt of client trust fund

193587	LAW OFFICE OF MARISA DESAUTEL LLC	\$1,837.50	Paid	8/11/2021	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
193765	LAW OFFICE OF MARISA DESAUTEL LLC	\$3,372.50	Paid	8/18/2021	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
193920	OPTIMAL ENERGY INC	\$74,118.25	Paid	8/20/2021	OPTIMAL ENERGY INC	Professional Services
194709	LAW OFFICE OF MARISA DESAUTEL LLC	\$1,877.50	Paid	9/18/2021	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
195802	LAW OFFICE OF MARISA DESAUTEL LLC	\$3,767.50	Paid	10/19/2021	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
196839	LAW OFFICE OF MARISA DESAUTEL LLC	\$7,846.01	Paid	11/17/2021	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC includes mgmt of client trust fund
196855	OPTIMAL ENERGY INC	\$70,198.50	Paid	11/17/2021	OPTIMAL ENERGY INC	Professional Services
196854	OPTIMAL ENERGY INC	\$64,573.50	Paid	11/17/2021	OPTIMAL ENERGY INC	Professional Services
197364	OPTIMAL ENERGY INC	\$50,165.50	Paid	12/8/2021	OPTIMAL ENERGY INC	Professional Services
198048	LAW OFFICE OF MARISA DESAUTEL LLC	\$13,627.05	Paid	12/18/2021	LAW OFFICE OF MARISA DESAUTEL LLC	Legal Counsel to EERMC
2021 YTD Payments Issued to EERMC		\$742,433.08				

PUC 5-8

Request:

To illustrate how changes in AESC Study values affect benefits calculations, consider a hypothetical scenario in which the Company had estimated the dollar value of benefits from its 2021 Energy Efficiency Program Plan (Docket No. 5076) using the results of the 2021 AESC Study (as opposed to the results of the 2018 AESC Study). For both the 2021 gas and electric Energy Efficiency Programs, please recalculate Tables E-6 and G-6 using the results of the 2021 AESC Study. Then, using similar formatting as Tables E-6 and G-6, provide two results tables (one for gas and one for electric) that compare the dollar value of each benefits category in Docket No. 5076 to the Company's estimate of the dollar value of each benefits category using the results of the 2021 AESC Study. (Note: for those benefits categories whose associated dollar values are not sourced from the AESC Study, assume no change).

Response:

Please see the response to PUC 5-1.

PUC 5-9

Request:

In response to PUC 3-21, the Company explained that it has not identified electric resistance heating customers using customer usage data. Regarding the portion of the Company's proposed 2022 energy efficiency program budget dedicated to the conversion of electric resistance heating systems to heat pumps, does the Company intend to identify those systems using customer usage data?

Response:

While the Company anticipates utilizing a number of approaches to conduct outreach to customers around the potential benefits of converting from electric resistance heating systems to heat pumps, these strategies have not yet been finalized. Accordingly, the Company cannot state definitively at this time that utilizing customer usage data to identify potential electric resistance heating customers will be one of those strategies.

PUC 5-10

Request:

Referencing the Company's response to PUC 1-122, please explain the following:

- a. Within the context of the Company's statement "there is no allocation of any values between models," please clarify what "any values" means.
- b. In the Company's first response paragraph, it writes "in all nine models, these avoided infrastructure values are multiplied by sector-specific annual net demand savings and divided by sector-specific net energy sales to produce a sector-specific avoided distribution / PTF transmission value component of the rate impact in cents/kWh." Please provide a mathematical illustration of how the non-income eligible rate and bill impacts model performs this calculation for both the avoided distribution and avoided Pool Transmission Facility rate impacts. The assumed values can be hypothetical.

Response:

- a. In the statement, "there is no allocation of any values between models", the phrase "any values" refers to avoided infrastructure investments.
- b. The mathematical illustration below uses numbers from the electric provisional plan's non-income eligible rate and bill impacts model.

Avoided distribution rate impacts

- 2022 avoided distribution cost = **\$98.06/kW**
- 2022 annual net demand savings = **6MW**
- 2022 net energy sales = **2,887,847 MWh**
- 2022 avoided distribution costs = **\$98.06/kW x 6MW x 1,000 kW / MW = \$558,069**
- 2022 avoided distribution value component of the rate impact = **-\$558,069 / (2,887,847 MWh x 100¢ / \$1 x 1 MWh / 1,000 kWh) = -0.019 ¢/kWh**

Avoided pool transmission facility rate impacts

- 2022 avoided transmission cost = **\$98.98/kW**
- 2022 annual net demand savings = **6MW**
- 2022 net energy sales = **2,887,847 MWh**
- 2022 avoided transmission costs = **\$98.98/kW x 6MW x 1,000 kW / MW = \$563,280**
- 2022 avoided transmission value component of the rate impact = **-\$563,280 / (2,887,847 MWh x 100¢ / \$1 x 1 MWh / 1,000 kWh) = -0.020 ¢/kWh**

PUC 5-11

Request:

Referencing the "TOTAL" value associated with each of the benefits categories included in Table E-6 of the Alternative Base Plan, explain the following:

- a. Assuming the Company meets 100% of its planned savings/installations goals for 2022, does the Company expect the dollar value of the total lifetime benefits achieved through 2022 program activity to be 100% of what is listed in Table E-6?
- b. If yes, why?
- c. If no, why?

Response:

- a. The Company expects the dollar value of total lifetime benefits achieved through 2022 program activity to be 100% of what is listed in Table E-6.
- b. The Company's response is based on the assumptions that it delivers the precise quantity of each measure proposed in the Alternative Base Plan. If the planned measure mix differs from the installed measure mix, a different dollar value of total lifetime benefits would likely be achieved.
- c. N/A

PUC 5-12

Request:

Attachment 4 of the 2022 Plan contemplates multiple benefits categories where dollar benefits are calculated, in part, by multiplying some savings value by a “losses” factor. Regarding the application of this “losses” factor, please explain the following:

- a. For measures with a measure life of one year or less, what value of losses does the Company apply to the measure’s associated savings? How is it calculated?
- b. For measures with a measure life of greater than one year, what values of losses does the Company apply to the measure’s associated savings? How is it calculated?

Response:

a. A loss factor is included when converting wholesale values to retail values. AESC 2021 states “AESC converts avoided costs from wholesale to retail values assuming marginal losses of 9 percent for energy (i.e., all avoided cost categories that are described in terms of \$ per kWh) and 16 percent for peak demand (i.e., all avoided cost categories that are described in terms of \$ per kW-year).”¹ For more information on the creation of loss factors and why they are applied, please see AESC Appendix B: Detailed Electric Outputs².

The loss factors used in AESC 2021 are shown below. For the 2022 Annual Energy Efficiency Plan, marginal loss factors were applied, as recommended in AESC 2021.

Table 147. Loss factors recommended for use in AESC 2021

	Energy	Peak Demand
Average	6% (a)	8% (c)
Marginal Recommended in AESC 2021	9% (b)	16% (d)

Sources: (a) https://www.iso-ne.com/static-assets/documents/2019/11/p2_transp_elect_fx_update.pdf, slide 25; (b) 1.5 x 6%, per 2011 RAP paper; (c) ISO New England Market Rules, Section III.13.1.4.1.1.6.(a); (d) 2 x 8%, per 2011 RAP paper.

The table below shows the avoided cost categories that have a loss factor applied, as well as how those loss factors are applied. Measure life is not an input when applying a loss factor, and the loss factor applied is the same regardless of measure life.

¹ AESC 2021, page 332. https://www.synapse-energy.com/sites/default/files/AESC%202021_20-068.pdf

² AESC 2021, page 327. https://www.synapse-energy.com/sites/default/files/AESC%202021_20-068.pdf

The Narragansett Electric Company
d/b/a National Grid
RIPUC Docket No. 5189
In Re: 2022 Annual Energy Efficiency Plan
Responses to the Commission's Fifth Set of Data Requests
Issued on December 15, 2021

Avoided cost category	Loss type	Formula: Retail value =
Electric energy	Marginal Energy	(Electric Energy Wholesale Value + RPS Compliance Cost) * (1+Marginal Energy Loss) * (1+Wholesale Risk Premium)
Energy DRIPE	Marginal Energy	Energy DRIPE * (1+Marginal Energy Loss) * (1+Wholesale Risk Premium)
Cross-DRIPE	Marginal Energy	Cross-DRIPE * (1+Marginal Energy Loss) * (1+Wholesale Risk Premium)
Non-embedded GHG	Marginal Energy	(Non-embedded GHG + RPS Compliance Cost) * (1+Marginal Energy Loss)
Non-embedded NOx	Marginal Energy	(Non-embedded NOx + RPS Compliance Cost) * (1+Marginal Energy Loss)
Capacity	Marginal Peak Demand	Capacity * (1+Marginal Peak Demand)
Capacity DRIPE	Marginal Peak Demand	Capacity DRIPE * (1+Marginal Peak Demand)
Reliability	Marginal Peak Demand	Reliability * (1+Marginal Peak Demand)
PTF	Marginal Peak Demand	PTF * (1+Marginal Peak Demand)

b. See PUC 5-12 (a).

PUC 5-13

Request:

In PUC 3-19, the PUC asked the Company how, specifically, the ConnectedSolutions programs contribute to lowering ICR. The Company's response consisted of a link two AESC documents. Please respond to the original question posed in PUC 3-19.

Response:

The question asked in PUC 3-19 is "Does the demand reduction delivered by National Grid's Residential and Commercial ConnectedSolutions programs reduce the ISO-NE Installed Capacity Requirement (ICR)? If yes, explain how, specifically, the ConnectedSolutions programs contribute to lowering ICR."

It is the Company's understanding that, yes, the demand reduction delivered by National Grid's Residential and Commercial ConnectedSolutions programs reduce the ISO-NE Installed Capacity Requirement (ICR), albeit with a delay of a few years.

The Company does not bid Residential or Commercial ConnectedSolutions demand reduction into the Forward Capacity Market. Therefore, ConnectedSolutions MW actually delivered by the Company in a program year (defined as year 1 for the purposes of this response) will be part of aggregate loads observed by ISO-New England as it records actual demand during that summer. Those MW will also be a factor in an updated forecast regional demand in the subsequent CELT report to be issued in the following spring (year 2). This in turn will factor into the Installed Capacity Requirement that will set the basis for capacity needs in the Forward Capacity Auction to be held the following February (year 3)¹ for delivery of capacity three years later (year 6). If 2022 is year 1, then ConnectedSolutions MW will be factored into the ICR for 2027.² If there were no ConnectedSolutions MW delivered in 2022, the ICR values would be greater.

¹ See https://www.iso-ne.com/static-assets/documents/2019/09/p1_load_forecast_methodology.pdf for ISO-NE's presentation about its forecast methodology. The Company interprets this as showing that the draft capacity forecast produced in February as noted on slide 6 of the presentation is not sufficiently developed to be the basis for the Forward Capacity Auction which also takes place in February (e.g., FCA 16 is scheduled for February 7, 2022). If the draft forecast is used in the concurrent FCA, then the timeline described here would be shortened by one year.

² This is consistent with AESC 2021 instructions, page 329, on the application of capacity values to unbid or uncleared capacity: "The uncleared capacity columns provide estimates for capacity based on uncleared capacity or unbid capacity avoided through energy efficiency measures. The values are multiplied by the capacity price load effect and reserve margin percentages. Because FCA auctions are set three years in advance of the actual delivery year, avoided capacity not bid into an FCA will not impact ISO New England's determination of forecasted peak until 2026 for measures installed in 2021."

PUC 5-14

Request:

Referencing the Company's response to PUC 3-23, why do the Estimated Total Device Vendor Fees for Thermostats represent a much larger percentage of total measure cost than for the other measures?

Response:

The per-device vendor fees for thermostats are similar to other devices.

The relatively large percent of vendor fees for thermostats compared to the total measure cost for thermostats is high because the cost to run this measure has decreased over time and the customer incentive is relatively low.

PUC 5-15

Request:

Referencing Table E-6B of the Provisional Plan, please explain how the Residential ConnectedSolutions program will deliver 59.4 MWh of energy savings in 2022.

Response:

There are three measures that are part of the Residential Connected Solutions offerings that include some amount of energy savings or energy penalties.

- Thermostats New
- Thermostats Existing
- Battery Daily (consumption)

For all three offerings, the energy savings is calculated as the net savings as a result of both the energy savings that occurred during an event and any additional consumption that occurred before or after the event as a result of the demand response offering.

For the two thermostat offerings (new and existing), there is a positive energy savings value that occurs during the demand response event but there is also penalties that occur during the pre-cooling before the event and post-recovery after the event. It was determined through a [MA Evaluation Study](#) conducted in 2019 that the net impact resulted in a small amount of energy savings (620 Whs per participant per event). The assumption is that the PAs will call around 14 events per year resulting in a net savings of 8.5 kWh per participant per year.

For the battery daily (consumption), there is a need to have a fully charged battery prior to calling an event. There are also some minor efficiencies loses associated with the round-trip charging and discharging of the batteries. National Grid is using the following formula to calculate these loses.

$$\text{maximum load kW (-6.6 kW)} * \text{\# of Events (40)} * 2.25 \text{ hours} * \text{round trip efficiency loses (10\%)} = -59.4 \text{ kWhs}$$

Incorporating the total number of participants results in the total kWh savings for each measure as shown below.

PUC 5-15, page 2

Thermostats New – (8.5 kWh * 2692 participants) = 22828 kWh savings

Thermostats Old – (8.5 kWh * 6409 participants) = 54348 kWh savings

Battery Daily (consumption) – (-59.4 kWh * 300 participants) = -17820 kWh Savings

Total = 59.4 MWhs of energy savings for the residential connected solutions program offerings.

Please note that the 59.4 Annual MWh of energy savings cited above is not counted towards the Company's energy efficiency goals listed in table E-7 of Attachment 5 of the Annual Plan. These energy savings do not count towards the Energy Efficiency Performance Incentive or the Demand Response Performance Incentive.

PUC 5-16

Request:

Referencing the Company's response to PUC 3-24, please clarify what definition of "front of the meter" the Company based its response on. In your response, clarify whether facilities enrolled in the Renewable Energy Growth program, where generation is separately metered than load, can participate in Connected Solutions.

Response:

The Company defines behind the meter (BTM) facilities as facilities that serve an on-site load other than parasitic load or station load used to operate the facility. Front of the meter (FTM) facilities are any facilities that are not BTM. FTM facilities are not eligible for Connected Solutions programs. This excludes power plants, solar farms, and Company-owned assets from Connected Solutions.

A facility's enrollment in the Renewable Energy Growth (REG) program is not, itself, a determinant of a project's FTM or BTM status – therefore, REG enrolled projects that are behind the meter are eligible for participation in Connected Solutions. REG enrolled projects that are front of the meter are not.

PUC 5-17

Request:

Referencing Table E-6B of the Alternative Base Plan, please explain the following with regards to the Residential ConnectedSolutions program:

- a. What do the proposed 7.4 MW of summer load reduction represent – load reduction coincident with the 2022 ISO-NE system peak, total load reduction over the course of the summer, or something else?
- b. It is Commission staff's understanding that one way National Grid will monetize the peak demand reduction achieved by the Residential ConnectedSolutions program will be through a reduction in capacity charges allocated to it by ISO-NE. If this statement is correct, please indicate which column in Table E-6B those benefits would appear in. If this statement is incorrect, please correct it.
- c. Relative to the 2022 ISO-NE system peak, when will the capacity charges allocated to National Grid by ISO-NE reflect the demand reduction achieved in 2022 through the Residential ConnectedSolutions program?
- d. Once National Grid is allocated its share of capacity charges associated with the 2022 ISO-NE system peak (inclusive of the of the demand reduction from the Residential ConnectedSolutions program), how will National Grid allocate the appropriate share of total capacity charges to its residential Last Resort Service customers? In your response, explain if and how the Company uses actual demand reduction achieved through Residential ConnectedSolutions as an input into the capacity charge allocation formula.

Response:

- a. The 7.4 MW of Load Reduction shown in Table E-6B is the average load reduction for every residential measure for every hour of every demand response event over the summer.
- b. The statement in the question "one way National Grid will monetize the peak demand reduction achieved by the Residential ConnectedSolutions program will be through a reduction in capacity charges allocated to it by ISO-NE" would be better stated "one way National Grid's customers will monetize the peak demand reduction achieved by the Residential ConnectedSolutions program will be through a reduction in capacity charges billed to the Company by its wholesale last resort service providers and passed through to customers in capacity rates."

The avoided capacity benefits shown in Table E-6B do not show customer benefits calculated according to customer benefits monetized in this way. Avoided capacity benefits in Table E-6B are calculated using the avoided cost of capacity from AESC

PUC 5-17, page 2

2021, the average demand reduction from the ConnectedSolutions program, and the Limited Demand Response Scaling Factor line of the BC model. The Limited Demand Response Scaling Factor is calculated using a method developed by Synapse Energy.¹

The question highlights the difference between the way avoided capacity cost benefits are calculated for the ConnectedSolutions program for planning purposes and shown in Table E-6B and how benefits may actually flow to customers from DR programs. The latter value will not be known until the events of summer 2022 occur and capacity is resettled, as described below in part d.

- c. Understanding as noted above that capacity charges are not allocated to National Grid by ISO-NE, in the capacity load obligation charge a reduction in customers peak would impact the Peak Contribution Value, also known as ICAP tags. Customers' peak contribution values are determined by the load coincident with the ISO-NE system peak in the prior calendar year. Given a reduction in the 2022 ISO-NE system peak which occurs in calendar year 2022, the demand reduction will be reflected in the next capacity year, which is June 2023 through May 2024.
- d. As described in the response to c, the demand reductions will begin to impact capacity charges beginning June 2023. Currently, the Company enters into transactions for energy and capacity at a fixed, monthly price. Wholesale suppliers pass through the capacity they are charged by the ISO at cost.

The demand reductions will go into effect during the Company's summer rate period, April 2023 through September 2023. The Company estimates expected capacity costs to include in its LRS rates prior to the rate period. This summer rate will be filed with the PUC in January 2023. At that time, the ISO will have released its preliminary 2022 system peak and the Company has resettled hourly load data for each customer group. Assuming that the resettled hourly load data reflects the demand reduction, the demand reduction will be captured in the Company's estimated capacity rates for June 2023 through September 2023. The difference between the Company's estimated costs and the actual costs are captured in the annual Last Resort Service Adjustment Factor.

PUC 5-18

Request:

Referencing Table E-6B of the Alternative Base Plan, please explain the following with regards to the Commercial ConnectedSolutions program:

- a. What do the proposed 32.4 MW of summer load reduction represent – load reduction coincident with the 2022 ISO-NE system peak, total load reduction over the course of the summer, or something else?
- b. It is Commission staff's understanding that one way National Grid will monetize the peak demand reduction achieved by the Commercial ConnectedSolutions program will be through a reduction in capacity charges allocated to it by ISO-NE. If this statement is correct, please indicate which column in Table E-6B those benefits would appear in. If this statement is incorrect, please correct it.
- c. Relative to the 2022 ISO-NE system peak, when will the capacity charges allocated to National Grid by ISO-NE reflect the demand reduction achieved in 2022 through the Commercial ConnectedSolutions program?
- d. Once National Grid is allocated its share of capacity charges associated with the 2022 ISO-NE system peak (inclusive of the of the demand reduction from the Commercial ConnectedSolutions program), how will National Grid allocate the appropriate share of total capacity charges to its commercial and industrial Last Resort Service customers? In your response, explain if and how the Company uses actual demand reduction achieved through Commercial ConnectedSolutions as an input into the capacity charge allocation formula.

Response:

Please see the response to PUC 5-17.

The response for the Residential ConnectedSolutions Program applies to the Commercial ConnectedSolutions Program.

PUC 5-19

Request:

In Table E-5 Primary of both the Provisional and Alternative Base Plans, the Company lists "N/A" in the "cents/ lifetime kWh" column for the Residential and Commercial ConnectedSolutions programs. Please explain the following:

- a. Why does the Company list "N/A" for both ConnectedSolutions programs?
- b. Based, in part, on your response to part a, please explain whether \$/kW-month would constitute an appropriate metric for assessing the cost of achieving relevant demand savings from the ConnectedSolutions programs.
- c. Estimate the \$/kW-month metric for each measure contained in the proposed 2022 Residential and Commercial ConnectedSolutions programs, as well as the total programmatic \$/kW-month metric for each program.

Response:

- a. Fundamentally, the intent of the programs is to achieve demand savings, not energy savings. Historically, the ConnectedSolutions programs have not had kWh savings. Therefore, a cents/lifetime kWh value would not be meaningful and is not calculated.
- b. The Company believes that \$/kW-month would be an appropriate metric for assessing the cost of achieving demand savings from the ConnectedSolutions programs, compared to the default of cents/lifetime kWh.

The demand savings from the programs occur in the summer months – June, July, August, and September. The load reduction savings presented in the E-6B table represent the average monthly savings over the four months of the program. While savings occur only in those four months, program spending occurs during all twelve months of the year and is representative of the cost of achieving the load reduction in the summer months. A portion of program spend is evenly distributed throughout the year, including labor costs, IT costs, etc. Another portion of program spend is seasonal, such as performance payments after the summer months have been concluded.

The \$/kW-month metric would be calculated at the program level as:

Program annual budget¹ / (Average monthly kW load reduction² x 4)

¹ Source: E-3 Table

² Source: E-6B Table

The Narragansett Electric Company
d/b/a National Grid
RIPUC Docket No. 5189
In Re: 2022 Annual Energy Efficiency Plan
Responses to the Commission's Fifth Set of Data Requests
Issued on December 15, 2021

c. Using the above formula, the table below shows the calculations for program \$/kW-month for the 2022 Provisional Plan.

Program	Program Spend (\$)	Average Monthly Net Summer kW	\$/kW-month
Residential ConnectedSolutions	\$1,811,464	7,365	\$61.49
Commercial ConnectedSolutions	\$4,368,618	32,400	\$33.71

The \$/kW-month metric would be calculated at the measure level as³:

$$\text{Incentive budget} / (\text{Average monthly kW load reduction}^4 \times 4)$$

The table below shows the calculations for measure \$/kW-month for the 2022 Provisional Plan.

Program	Measure	Incentive (Total)	Average Monthly Net Summer kW	\$/kW-month
Residential ConnectedSolutions	Thermostats New	\$121,140	1,588	\$19.07
Residential ConnectedSolutions	Thermostats Existing	\$128,180	3,781	\$8.47
Residential ConnectedSolutions	Battery Daily (savings)	\$792,000	1,980	\$100.00
Residential ConnectedSolutions	Pool Pumps	\$3,000	16	\$48.39
Commercial ConnectedSolutions	C&I Daily Dispatch (Savings)	\$3,000,000	10,000	\$75.00
Commercial ConnectedSolutions	C&I Targeted Dispatch	\$1,120,000	22,400	\$12.50

³ Program-level expenses have not been redistributed to measures.

⁴ Source: Electric BC model

PUC 5-20

Request:

For each program years in which the Company has offered the ConnectedSolutions, provide a comparison of the \$/kW-month cost of achieving the demand savings through the program to the ISO-NE FCM Net Regional Clearing Price (for the capacity zone to which Rhode Island belonged). Provide separate comparisons for the Residential ConnectedSolutions program and the Commercial ConnectedSolutions programs.

Response:

Residential

The cost and savings (in kW) for the residential ConnectedSolutions program are given in PUC 1-72. For convince, those values are repeated below and divided to produce a \$/kW-month value.

	2016	2017	2018	2019	2020	2021
Actual demand reduction (kW) for the summer peaks	48 kW	321 kW	569 kW	1,965 kW	4,330 kW	TBD
Actual program spend by the end of the calendar year	\$236,100	\$434,536	\$171,639	\$219,776	\$570,577	TBD
Actual program spend divided by actual demand reduction (\$/kW-year)	\$4,918.75	\$1,353.69	\$301.65	\$111.85	\$131.77	TBD
Divided by 12 (\$/kW-month)	\$409.90	\$112.81	\$25.14	\$9.32	\$10.98	TBD

Commercial and Industrial

The savings (in MW) for the commercial and industrial customer ConnectedSolutions program are given in on page 281 and 282 of the plan.

The costs for 2019 and 2020 are available in Table E-1 of the Year-End Report. The costs for 2017 and 2018 were not in the Year-End Report, because at the time Connected Solutions was still a demonstration.

The Narragansett Electric Company
d/b/a National Grid
RIPUC Docket No. 5189
In Re: 2022 Annual Energy Efficiency Plan
Responses to the Commission's Fifth Set of Data Requests
Issued on December 15, 2021

PUC 5-20, page 2

	2017	2018	2019	2020	2021
Actual demand reduction (kW) for the summer peaks	11,000	27,000	32,000	25,000	TBD
Actual program spend by the end of the calendar year	\$450,450	\$1,105,650	\$1,308,800	\$2,334,200	TBD
Actual program spend divided by actual demand reduction (\$/kW-year)	\$40.95	\$40.95	\$40.90	\$93.37	TBD
Divided by 12 (\$/kW-month)	\$3.41	\$3.41	\$3.41	\$7.78	TBD

The results of the ISO-NE's Forward Capacity Auctions shown below¹.

	FCA 7	FCA 8	FCA 9	FCA 10	FCA 11	FCA 12
	June 1 2016 to May 31 2017	June 1 2017 to May 31 2018	June 1 2018 to May 31 2019	June 1 2019 to May 31 2020	June 1 2020 to May 31 2021	June 1 2021 to May 31 2022
Closing Auction Rate for Rhode Island (\$/kW-month)	\$2.744	\$7.025	existing \$11.080 new \$17.728	\$7.030	\$5.297	\$4.631

Please note that although the results from ISO-NE Forward Capacity Market auctions is an input to how the system benefits of the Avoided Energy Supply Cost study are calculated, the total system benefits of the AESC do not equal the results of Forward Capacity Market auctions.

¹ <https://www.iso-ne.com/static-assets/documents/2018/05/fca-results-report.pdf>

PUC 5-21

Request:

Referencing the Company's response to PUC 3-31, please clarify the following:

- a. Knowing that the Company anticipates earning a performance incentive for any demand savings achieved through the ConnectedSolutions program in 2022, what does the Company consider to be the corresponding capacity savings goal for that time period? Please reference the specific sections of the Amended Settlement Agreement from Docket No. 4770 that form the basis of the Company's response.
- b. Knowing that the Company anticipates earning a performance incentive for any demand savings achieved through the ConnectedSolutions program in 2022, what does the Company consider to be the maximum incentive level (in dollars) for that time period? Please reference the specific sections of the Amended Settlement Agreement from Docket No. 4770 that form the basis of the Company's response.

Response:

- a. Referencing Article (II), Section (C)(19)(a) of the Amended Settlement Agreement (ASA) at Bates p. 70, the Company cites the column labeled "2021" of the table titled "Annual MW Capacity Savings: Targets and Maximum Earning Opportunities", which indicate the following capacity savings targets for 2021:

Minimum:	21MW
Target:	24MW
Maximum:	29MW

- b. Referencing the same table as cited in part (a) of this response, the Company cites the \$944.14 value in the Earnings at Maximum (\$000) cell of the column labeled "2021"

In applying both the capacity target as well as the maximum earning opportunity from the 2021 column to calendar year 2022, the Company references the same letter agreement between the Division of Public Utilities and Carriers ("Division") and the Company dated June 28, 2021 referenced in the Company's response to PUC 3-31, whereby the Division consented to an extension of the Multi-Year Rate Plan pursuant to Article II, Section C.21 of the ASA beyond September 1, 2022 (i.e. the expiration of Rate Year 4).¹ Section C.21.b.i of the ASA provides that "to the extent new base distribution rates resulting from the filing of the Company's next general rate case are not in effect by September 1, 2022 . . . [the ASA]

¹ See [National Grid's notification of agreement between the Company and the Rhode Island Division of Public Utilities and Carriers regarding an extension of the term of the Multi-Year Rate Plan](#), dated July 15, 2020 in Docket No. 4770.

The Narragansett Electric Company
d/b/a National Grid
RIPUC Docket No. 5189
In Re: 2022 Annual Energy Efficiency Plan
Responses to the Commission's Fifth Set of Data Requests
Issued on December 15, 2021

shall remain in effect during the interim and if required, the Performance Incentive Mechanism provision shall be extended to cover the additional interim period.”

PUC 5-22

Request:

For each ConnectedSolutions measure to which the Company applies a DR Scaling Factor (as described in the Company’s response to PUC 3-22), provide the following information:

- a. The DR Scaling Factor (value) assumed by the Company for the 2022 energy efficiency program.
- b. Documentation to support the calculation of the DR Scaling Factor (for example, the “separate spreadsheet tool” referenced by the Company in response to PUC 1-97).
- c. Underlying calculation(s) demonstrating how the Company applied the DR Scaling Factor when calculating the Summer Generation benefits associated with the measure.
- d. Underlying calculation(s) demonstrating how the Company applied the DR Scaling Factor when calculating the Electric Capacity DRIPE benefits associated with the measure.

Response:

- a. The Limited DR Scaling Factors are given in the filed BC model on tab ADMCalcsYr1 in column BE and are copied below for convience.

Measure	Limited Demand Response Scaling Factor
Thermostats New	38%
Thermostats Existing	38%
Battery Daily (savings)	72%
Battery Daily (Consumption)	72%
Solar Inverters	100%
Pool Pumps	72%
C&I Daily Dispatch (Savings)	72%
C&I Targeted Dispatch	10%
Solar Inverters	100%

- b. The forecasted Limited DR Scaling Factor for 2022 were assumed to be the same as the actual Limited DR Scaling Factors for 2020. The Limited DR Scaling factors for 2021 are not yet available. The Company plans to call on pool pumps on the same days and times as the Daily Dispatch and residential battery measures. So, it will have the same Limited DR Scaling Factor. The Company plans to set the solar inverters for power factor correction to the same settings for the entire summer. So, it has a Limited DR Scaling Factor of 100%.

PUC 5-22, page 2

Please see attached the 4 Excel spreadsheets that were used to calculate the Limited DR Scaling Factors for 2020.

- c. Using the Targeted Dispatch measure for 2020 as an example.
1. The Company inputted the amount of MW curtailed (column F) into the spreadsheet provided by Synapse in accordance with their research on how multiple DR events in a summer affect system benefits¹.
 2. The Company took the Average curtailment (MW) from cell K7 of the Synapse tool, multiplied it by 1,000 to convert to kW, and inputted it into the "Maximum Load Reduction (kW)" column AC of the ADMCalcsYr1 tab of the BC model. Note, a more accurate label for the column would be "**Average** Load Reduction."
 3. The Company took the Resulting scaling factor from cell K9 of the Synapse tool, converted to percent, and inputted it into the Limited Demand Response Scaling Factor column BE of the ADMCalcsYr1 tab of the BC model.
- d. The DRIPE benefits are calculated in the "Electric Capacity DRIPE (\$)" column of the ADMCalcsYr1 tab of the BC model. For example, the formula for the "Thermostat New" measure is:
- ```
=IF($G4="", "", $DM4*$Y4*$DU4*(@INDEX(avoidedcosttbl1,$H4,BL$1)+((($H4-
ROUNDDOWN($H4,0))*(@INDEX(avoidedcosttbl1,ROUNDUP($H4,0),BL$1)-
(@INDEX(avoidedcosttbl1,ROUNDDOWN($H4,0),BL$1))))))
```
- Cell DU4, highlighted above, returns the Limited DR Scaling Factor for this measure. The DRIPE savings are multiplied by the Limited DR Scaling Factor.

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<sup>1</sup> [https://www.synapse-energy.com/sites/default/files/The\\_effect\\_of\\_load\\_reductions\\_on\\_peak\\_forecasts.pdf](https://www.synapse-energy.com/sites/default/files/The_effect_of_load_reductions_on_peak_forecasts.pdf)

The Narragansett Electric Company  
d/b/a National Grid  
RIPUC Docket No. 5189  
In Re: 2022 Annual Energy Efficiency Plan  
Responses to the Commission's Fifth Set of Data Requests  
Issued on December 15, 2021

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PUC 5-22, page 3

The Company is providing four (4) Excel files as part of its response to this request.

PUC 5-23

Request:

In response to PUC 3-22, the Company explained that it applies a DR Scaling Factor to expected demand reduction for purposes of estimating the value of Summer Generation benefits and Electric Capacity DRIPE benefits. For each of the following benefits categories, explain why the Company does not apply the DR Scaling Factor to expected demand reduction for purposes of benefit valuation. If your response differs between the Residential and Commercial ConnectedSolutions programs, please explain. a. Transmission benefits b. Distribution benefits c. Reliability benefits

Response:

The Company does not apply a scaling factor to transmission benefits, distribution benefits, or reliability benefits in order to be consistent with guidance in the AESC 2021 Study.

AESC 2021 discusses the applicability of a scaling factor to uncleared resources on page 130: “Uncleared resources affect the load forecast only to the degree that these resources provide load reductions on the hours used in the load forecast regression. Some resources—such as demand response resources—may be active only on one or some of the hours used in the load forecast. As a result, these resources would provide a diminished uncleared capacity benefit.”

The diminished capacity value is relevant in the context of those benefits associated with the capacity market, such as electric generation and capacity DRIPE. The transmission, distribution, and reliability benefits identified in the question are not associated with the capacity market and therefore are not modified by the scaling factor.

AESC Appendix K, Scaling Factor for Uncleared Resources, gives explicit instructions to that effect (emphasis added)<sup>1</sup>

“Program administrators wishing to use this appendix will want to use the Appendix K workbook to estimate the appropriate scaling factor for their DSM resource. This factor is then multiplied by the uncleared capacity or uncleared capacity DRIPE avoided cost (calculated using the AESC 2021 User Interface) and the measure’s capacity savings and seasonal coincidence factor to provide the final benefit value. ***This scaling factor is not applicable to cleared capacity, cleared capacity DRIPE, cleared reliability, uncleared reliability, or any other avoided cost category.***”

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<sup>1</sup> AESC 2021. [https://www.synapse-energy.com/sites/default/files/AESC%202021\\_20-068.pdf](https://www.synapse-energy.com/sites/default/files/AESC%202021_20-068.pdf) (pages 384-385)