

# Conservation and Load Management Plan

What it is – how to engage

CEEJAC Energy and Technology Subcommittee

June 18, 2025 Via Zoom

Kathy Fay, Bernie Pelletier

# Agenda

- Energy Efficiency Board
  - Board purpose
  - Members and roles
  - Board structure
  - Engaging with the board
- Green Bank programs that people think are EEB programs
  - Solar
  - Energy Storage Solutions
- Conservation and Load Management:
  - Priorities of the C&LM
  - Programs
  - Maybe federal help (maybe not)
- Data for decision making
- Resource Links

# Energy Efficiency Board

- The Board was created in 1998 by the Connecticut State Legislature, and now operates under mandates in Public Acts: [11-80 Section 33](#), [13-298 Section 16](#), and [21-139](#).

- Non- voting:

- 6 members from utilities (Eversource, UI, Muni's)

- Voting:

- Anthony Kosior – Chamber of Commerce
- John Viglione – Office of Consumer Counsel
- Katie Dykes – DEEP
- Amanda Fargo Johnson – CT Farm
- Kathy Fay – Low Income Customers
- Anne Marie Knight – Statewide Business Association
- Melissa Kops – Municipalities
- Amy McMahon – State Wide Retail Organization
- Jack Traver – State Wide Manufacturing Association
- John Wright – Attorney General's Office
- Bernie Pelletier – Residential customers
- Vacant – Statewide Environmental Group



# Responsibilities/ Funding/ Guidelines/Committees

- Represent and connect with communities, residents, students, businesses
- Assist and advise utilities to develop and implement – cost effective energy conservation and market transformation plans
- Report to legislators on program performance
- Funded by gas and electric bill surcharge, RGGI funds, and Forward Capacity Market auctions.
- Programs must be cost effective
- Committees:
  - C&I
  - Evaluation
  - Marketing
  - Residential
  - Equity Working Group (You will be hearing more from Kathy Fay!)

# Three Overarching Priorities

**Decarbonization**

**Equitable Access**

**Energy Affordability**

<https://energizect.com/eeb-clm-plans>

# Residential Programs



- HES – “Market Rate” customers in 1–4-unit buildings – energy assessment, health and safety, on the spot energy measures, and evaluation for deeper measures (insulation – HVAC)
- HES –IE (Home energy solutions Income Eligible):
  - Households below 60% SMI
  - Assessment
  - No cost measures for customers (no cost insulation, HVAC, duct sealing, windows, etc)
- Multifamily - for buildings of 5 or more units – combines HES – HES IE – and Commercial elements.

# Financing



- Landlord loan – owners of 1 – 4-unit buildings get low-cost financing to make energy efficiency upgrades
- Navigator Pre-Development – helps analyze and design energy efficient improvements
- LIME – for buildings with 2/3 or more of units affordable to residents <80% AMI

# Commercial and Industrial



- Small Business Energy Advantage – HES for “small business”
- C&I financing for municipalities, small business, microbusiness

# Education, Workforce Development, Community Outreach, Technical Engagement

- K - 12 Education:
  - In class training, large assembly presentation, workshops for educators, career workshops, technical training (Green Steps), student contests, ee smarts, lesson materials
  - Energy in action mobile exhibit (another on the way)
- Workforce training, certification
- Community outreach:
  - CPI
  - Community grants
- Customer education
- Technical engagement for towns (benchmarking)

# GREEN STEP SUMMMER GRADUATION CEREMONY



**Green STEP  
(Sustainability  
Technical Education  
Program)**

A “green” workforce development program in partnership with the high school system throughout the State of Connecticut.

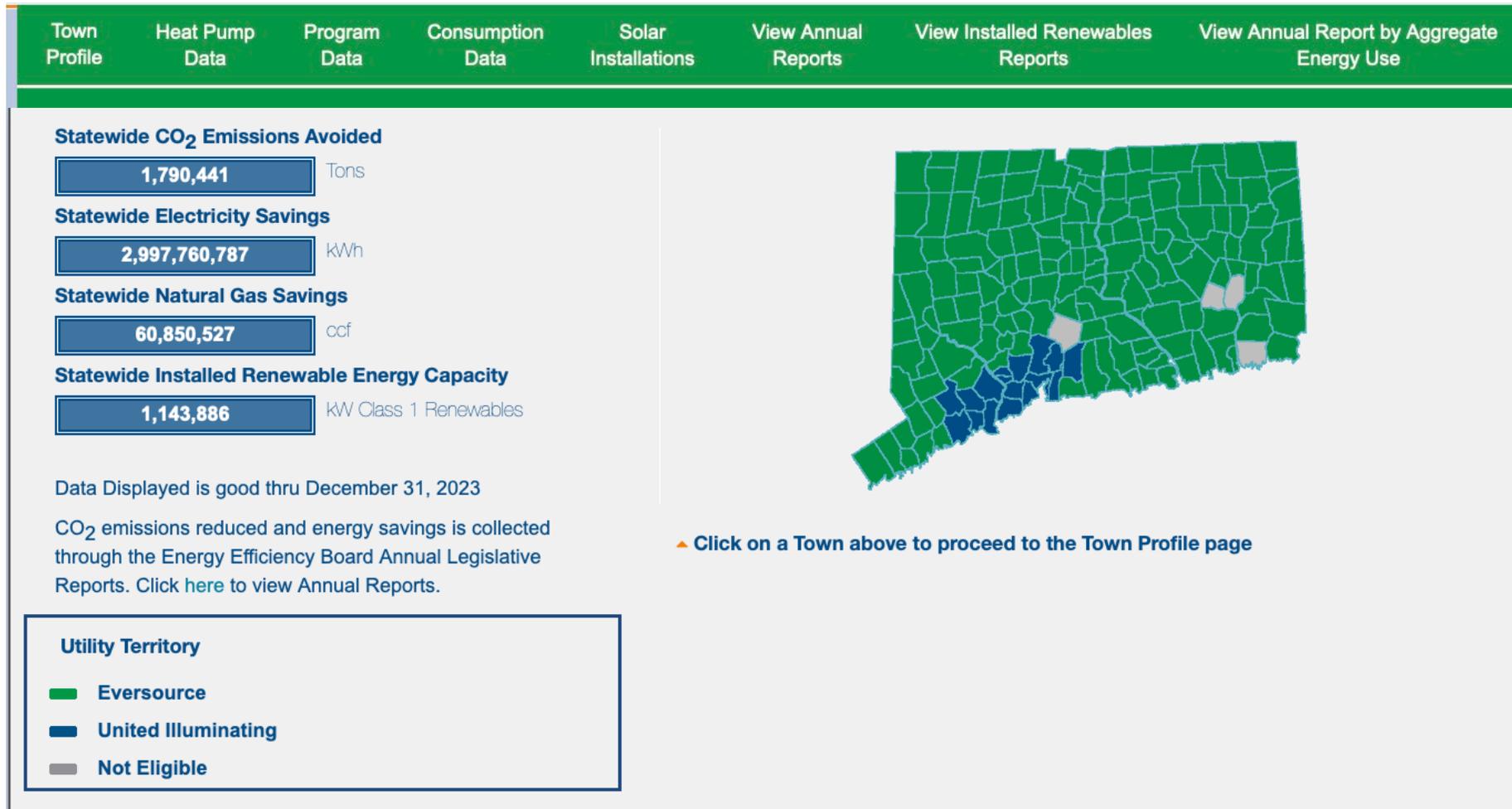
# Book the mobile exhibit

<https://energizect.com/resources-for/education/energy-in-action/mobile-exhibit>



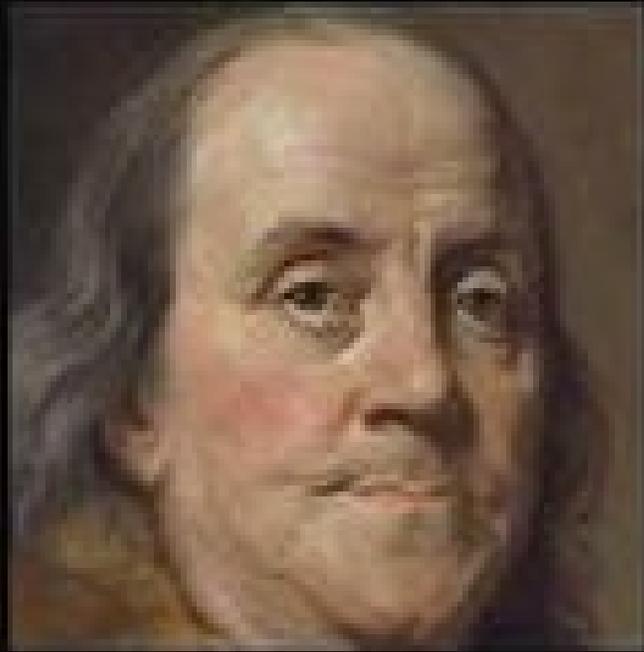
# Data measures progress

<https://www.ctenergydashboard.com/CEC/CECTownData.aspx>



# Summary

- C&LM plans offer support for everyone
- Federal funds may or may not supplement the C&LM
- Programs are critical to Connecticut's energy future but are under attack (i.e. Ban the Public Benefit Charge)
- Equity is a key (1 of 3) priority
- We may be the only game in town...



We must, indeed, all hang together or, most assuredly, we shall all hang separately.

- Benjamin Franklin



**2025-2027**

**Conservation & Load Management Plan**

Connecticut General Statute §16-245(m)(d)

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**NOVEMBER 1, 2024**

Submitted by: Eversource Energy, United Illuminating,  
Connecticut Natural Gas, and Southern Connecticut Gas

<https://app.box.com/s/wde22as035w0fx8qoux449a54bv7uiut>

# EEB – Getting touch

<https://energizect.com/eeb-contact-energy-efficiency-board>

## How to Contact the Board

For information about the EEB's activities and responsibilities, please contact the Board's **Executive Secretary, [James Williamson](#)** or by mail at:

Connecticut Energy Efficiency Board  
c/o Department of Energy and  
Environmental Protection  
10 Franklin Square New Britain, CT 06051

- Please [click here](#) for more information on the Board's membership. To receive updates and news from the Energy Efficiency Board, please [subscribe here](#).

# Energy Efficiency Board 2023 Programs and Operations Report

MARCH 1, 2024



BROUGHT TO YOU BY

**EVERSOURCE**



This report outlines the programs, the participation by town, the impact in dollars, GHG reduction, energy savings, and customers served.

<https://energizect.com/eeb/annual-legislative-reports>

About the Energy Efficiency Board

Board Announcements

Board Calendar

Board Meetings

Meet the Board

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Board Committees & Workgroups

Commercial & Industrial  
Committee

EEB/Green Bank Joint  
Committee

**Equity Working Group**

Evaluation Committee

Residential Committee

# Equity Working Group

## Working Group Chairperson:

Anne-Marie Knight

## Meeting Schedule

This is a new working group that was formally approved by the EEB on May 14, 2025; its first public engagement meeting is TBD.

## Materials from Equity Working Group Public Engagement Meetings:

Below, please find materials from the Equity Working Group Public Engagement Meetings. Most recent meetings are listed first. For any materials not listed below, please review the [Equity Working Group Meeting Main Box Folder](#) or contact the Board's [Executive Secretary](#), James Williamson.

# EWG Goals and Objectives

## . Objectives and Goals

- **Objectives**

- Accelerating progress on energy equity related issues
- Enabling investment of more discussion time and attention on equity issues than currently feasible
- Increasing direct community and vendor engagement
- Providing a vetting mechanism for energy equity recommendations prior to EEB Board review

- **Goals**

- Ensuring diverse perspectives (based on income level, ownership/rental situations, disability status, geographic location, business size etc) are included from external and internal stakeholders
- Identifying gaps in energy equity ie energy efficiency program benefits received and distribution of energy burdens that exist today (including the subset of high energy bills driven by electric heat).
- Recommending actionable restoration strategies to address the gaps.
- Measuring progress made as a result of the restoration strategies

# EWG Steering Committee

## Steering Committee (15)

- EEB Board Members (3) Term: 1 year
- DEEP Representatives (1) Permanent
- EEB Executive Secretary (1) Permanent
- Technical Consultants (1) Permanent
- Equity Consultants (2) Permanent
- Evaluation Administrator (1 as needed for current EA; added to new EA RFP as a requirement)
- Utility Representatives (4) 1 data, 1 implementation person from Eversource & Avangrid who may or may not be current Board members Term: 1 year
- CPI Representatives (2) as needed

# EWG Public Engagement

## **Enable Community/Vendor Participation**

- Open invitations to community members and vendors/contractors to attend alternate steering committee meetings for the entire meeting, with a focus on small/micro-businesses, EJC residents, renters, HES and HES IE participants
- These meetings in which the public will be present will be designated as Public Engagement Meetings (PEMs)

## **Voluntary participation in Public Engagement Meetings (PEMs)**

- Email invitations and community announcements on social media to community members and vendors/contractors to attend PEMs in alternate months using pre-existing EEB mailing lists and additional CTR Factor research with a focus on small/micro-businesses, EJC residents, renters, HES and HES IE participants

## **Location changes in Public Input Meetings (PEMs)**

- PEMs (alternate months) will be conducted in different locations across the state and will be conducted as hybrid meetings allowing for both face-to-face and virtual attendance to ensure that communities and vendors from all across the state are included and engaged. 4 such meetings are currently envisioned in June, August, October and December in 4 locations that are situated within primary EJC clusters across the state – New Haven, Hartford, New London and Bridgeport.

**FIRST PUBLIC ENGAGEMENT MEETING Tentatively scheduled July 24<sup>th</sup> in New Haven**

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**[Evaluation Committee](#)**

[Residential Committee](#)

[Contact the Board](#)

[Current and Approved C&LM Plans](#)

[Document Archive: 2008-2013](#)

[Evaluation Reports](#)

[Request for Proposals](#)

# Evaluation Committee

## Committee Chairperson

Kathy Fay

## Evaluation Committee Overview

The work of the EEB Evaluation Committee is guided by the [2021 Program Evaluation Roadmap](#), which provides detailed information about the Energy Efficiency Board's (EEB) evaluation procedures and rules.

Every three years, the Evaluation Committee develops a three year plan. The current plan is the Final [2025-2027 Evaluation Plan](#).

PA 11-80, Sec. 33 (d)(4) requires the Energy Efficiency Board to provide to the Energy and Technology Committee of the General Assembly an annual report of the results and recommendations of program evaluations undertaken in the course of the preceding year. To access the reports filed to date, please use the following links:

| REPORT BY YEAR       |                      |                      |                      |
|----------------------|----------------------|----------------------|----------------------|
| <a href="#">2011</a> | <a href="#">2012</a> | <a href="#">2013</a> | <a href="#">2014</a> |
| <a href="#">2015</a> | <a href="#">2016</a> | <a href="#">2017</a> | <a href="#">2018</a> |

# 1. The Basics

## **What is Evaluation, Measurement and Verification (EM&V)?**

*The systematic collection and analysis of information to document the impacts of DSM programs and recommend improvements in program design and delivery*

## **What are the main objectives of EM&V?**

- 1. To support continuous program improvement and program innovation*
- 2. To provide accountability by ensuring that claimed program impacts are accurate and credible*

# 1. The Basics, Continued

**What are the main types of EM&V studies?**

1. *Impact evaluations*
2. *Process evaluations*
3. *Market assessment studies*
4. *Data mining studies*

**What kind of training and background do evaluators generally need to have to do these studies?**

*The wide range of EM&V activities means the field tends to be a big tent: economists, engineers, statisticians, other social science fields*

# A Current Example:

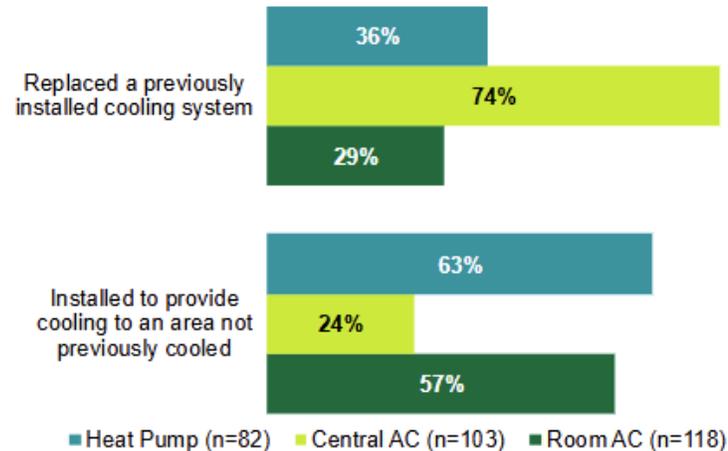
## 5. Residential Appliance Saturation Survey and Baseline (RASS, R2202) - Objectives and Use

- Characteristics of CT Homes
- Saturation of most important equipment
  - By equipment type
  - Efficiency and age
  - Type of home
  - Demographics
- New purchases
- Changes in saturation from two earlier studies (2014 and 2018)
- Program participation

# Same Current Example:

## 5. A Peek at RASS Findings – New Cooling Load

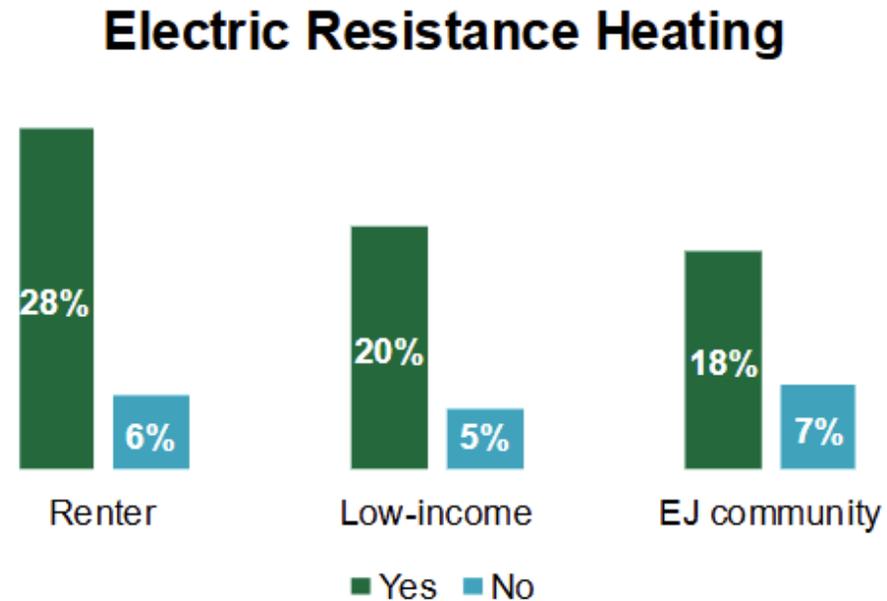
- One in three households (31%) installed new cooling system in last three years.
- Nearly half of those installed in spaces not previously cooled.
- Half of homes (48%) still have uncooled space in homes.



# Same Current Example:

## 5. A Peek at RASS Findings –EJ Communities

- Renters, low-income residents, and those living in environmental justice (EJ) communities are significantly more likely to primarily heat with electric resistance



# Another Example:



## **R2218A Process Evaluation – Quarterly Participant Surveys** *(Part of R2218+ HES/HES-IE Continuous Improvement Package)*

Findings from Round 1

Melissa Meek, Hannah Waskelis, and Abigail O'Meara



# Same Current Example:

## 6. Home Energy Solutions (HES) & HES Income-Eligible (HES-IE) Continuous Improvement Studies (R2218+)

### Recent findings

- Pre-existing “show-stopper” health & safety issues are a significant issue
- Uneven “kitchen-table” efforts and uptake of additional measures
- Evidence for low-realization rates: reported envelope-leakage reductions

### Upcoming

- Emphasis on process evaluation as revised program rolls out in 2026
- On-going quarterly surveys of participants and analysis of tracking data
- Impact evaluation efforts in 2026 and 2027