

# BLOCK ISLAND UTILITY DISTRICT



Several storms in December reminded us that despite making good progress changing poles, the pole replacement program is critical in keeping the lights on. We experienced three broken poles in December, all 1950s vintage like this one shown.

**BOARD OF COMMISSIONERS MEETING  
JANUARY 23, 2021**

**Block Island Utility District  
Regular Meeting of Board of Commissioners  
January 23, 2021 @ 11:00 AM**

***Meeting Held Remotely by Zoom due to Corona-19  
Town of New Shoreham Emergency Order***

1. Public Input
2. Review and Act Upon Commissioner's Report
  - a. Annual BOD Calendar
  - b. Review By-Laws
3. Approve Minutes:
  - a. November 14, 2020 Meeting Minutes
  - b. December 12, 2020 Meeting Minutes
4. Receive and Act on Treasurer's Report
  - a. Audit Schedule
  - b. Year End Financials (to be reviewed in February meeting)
5. Receive and Act on President's Report
  - a. So/Transmission Status Report Update
  - b. Net Metering Status
  - c. Champlin's Marina
  - d. Cell Tower Upgrade
  - e. Soil Remediation Update
  - f. Power Supply and Procurement Plan Update
6. Review and Act Upon DOE Grant Opportunity and BIUD/RI-OER Partnership
7. Receive Update on Efficiency Plan and Review Plan
8. Review and Act Upon Final House Drawings for HDC Submittal

Posted: January 20, 2021 10:00 AM

**Join Zoom Meeting**

**<https://us02web.zoom.us/j/2505454073>**

**Meeting ID: 250 545 4073**

**One tap mobile 1-312-626-6799**

**AGENDA ITEM 1**  
**PUBLIC INPUT**

(THIS PAGE INCLUDED FOR NOTES)

**AGENDA ITEM 2**  
**COMMISSIONER'S REPORT**

**Annual BOD Calendar**  
**Review By-Laws**

(THIS PAGE INCLUDED FOR NOTES)



# BLOCK ISLAND UTILITY DISTRICT BOARD OF COMMISSIONERS CALENDAR - 2021

January						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
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31						

February						
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28						

March						
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April						
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May						
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30	31					

June						
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July						
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August						
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29	30	31				

September						
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October						
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24	25	26	27	28	29	30
31						

November						
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28	29	30				

December						
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19	20	21	22	23	24	25
26	27	28	29	30	31	

HOLIDAYS

ELECTION MILESTONES

- JUNE 1 - MAIL FORMS TO DESIGNATE QUALIFIED ELECTORS TO ALL ACCOUNT HOLDERS
- JULY 1 - QUALIFIED ELECTOR FORMS DUE BACK TO BIUD
- AUGUST 30 - MAIL BALLOTS
- SEPTEMBER 1 - BALLOTS DUE BACK TO BIUD
- OCTOBER 4 - ELECTION RESULTS ANNOUNCED
- OCTOBER 23 - TRANSITION OF BOARD SEATS (LAST/FIRST MEETINGS)

REGULAR MONTHLY MEETING  
ALL SCHEDULED FOR 11:00 AM

ANNUAL MEMBERSHIP MEETING  
SCHEDULED FOR AUGUST 28 @ 4:00 PM  
BILL STUFFER ANNOUNCEMENT TO BE SENT ON JUNE 1

## **Block Island Utility District**

### **By Laws**

#### **ARTICLE I – STATEMENT OF PURPOSE**

Section 1. The Block Island Utility District was created by legislation entitled “The Block Island Utility District Act of 2017” found at chapter 45-67 of the Rhode Island General laws (the “Act”). The Act authorizes the Utility District to provide utility products and services within the Town of New Shoreham.

Section 2. “Utility District” means the Block Island Utility District, a municipal corporation, having a distinct existence from the State of Rhode Island and empowered by the Act to:

1. Fulfill electric utility functions, powers, rights and obligations;
2. Exercise certain powers as an electric distribution company and an emergency power producer; and
3. Provide additional utility services not inconsistent with the duties, powers, and obligations of the Utility District.

#### **ARTICLE II – MEMBERSHIP**

Section 1. A “Qualified Elector” is any person whose name appears on an active account with the Utility District and who is designated by the account holder to be the qualified elector.

Section 2. No active account shall have more than one Qualified Elector, and no Qualified Elector will have more than one vote. Any corporation or other legal entity that holds an active account shall designate in writing an individual officer or other representative to serve as the Qualified Elector for such active account.

Section 3. Annually, on June 1<sup>st</sup>, the Utility District will mail a form to designate the Qualified Elector to all active account holders. The Qualified Elector Designation will be due back to the Utility District by July 1<sup>st</sup>. If no new Qualified Elector is designated, it will remain the last Qualified Elector on record.

Section 4. For any vote by Qualified Electors, the Utility District will make available a list of qualified electors thirty (30) days prior to the date of the vote.

#### **ARTICLE III – POWERS OF THE UTILITY DISTRICT**

Section 1. The Utility District shall have and may exercise all powers granted to it by the Act, subject to the requirements of the Act and applicable law.

#### **ARTICLE IV – BOARD OF COMMISSIONERS**

Section 1. The Board of Commissioners (“Board”) has the responsibility to execute the powers of the Utility District in accordance with the Act.

Section 2. The Board shall consist of five (5) members with no less than three (3) being residents of the Town of New Shoreham.

Section 3. A majority of the Board constitutes a quorum, and unless otherwise expressly required, a majority of the members shall be necessary for all actions to be taken. No vacancy in the membership of the Board shall impair the right of a quorum to exercise all the rights and perform all the duties of the Board.

Section 4. The initial Board consisted of three (3) members of the Board serving four (4) year terms and two (2) members of the Board serving two (2) year terms. Upon the expiration of the term of any member of the Board, such member's successor shall be elected for a four (4) year term. Each member of the Board must be a Qualified Elector. The term of office of any member of the Board expires upon his or her death, disability, resignation, or removal as permitted by these bylaws or applicable law and upon the certification of the election of his or her successor by the secretary of the Utility District in accordance with these bylaws.

Section 5. Board members are elected by mail ballot. Ballots will be mailed to all Qualified Electors five (5) days after the Annual Meeting and must be returned within thirty days (30). Qualified Elector candidates have thirty (30) days prior to the Annual Meeting to submit in writing their declaration of candidacy. The secretary of the Utility District will oversee the tabulation and certification of the results of any election of members to the Board.

Section 6. The Board elects annually from among its members a chairperson; a vice chairperson; a secretary; and a treasurer. Such election shall occur at the first meeting of the Board following the certification of any election by the secretary and, in any year without an election, at the meeting of the Board in the month of September.

Section 7. A Board member who misses four (4) consecutive monthly meetings of the Board may be removed from membership on the Board by a majority vote of the remaining Board members.

Section 8. In the event of a vacancy on the Board, the Board will select an eligible candidate to fill the vacancy until the next Annual Meeting.

Section 9. Board members serve without compensation for attending scheduled and special meetings.

Section 10. Approval of the Board shall be required for all employment contracts with executive employees of the Utility District and the adoption of all employee benefit plans, including fringe benefits, for employees of the Utility District.

Section 11. Annual operating and capital budgets for the Utility District will be approved by the Board and presented at the Annual Meeting.

## **ARTICLE V – MEETINGS**

Section 1. The annual meeting of the Utility District ("Annual Meeting") will be held on a Saturday in August in each year, the specific date to be determined by the Board. Notice of the time and location of the Annual Meeting will be mailed to each Qualified Elector not less than sixty (60) days prior to the Annual Meeting. The meeting time and location will be posted according to the

requirements of Rhode Island law governing meetings of public bodies, including without limitation chapter 42-46 of the Rhode Island General Laws (the “Open Meetings Regulations”), and will also be published in The Block Island Times.

Section 2. A monthly meeting of the Board of the Utility District will be held on the fourth (4<sup>th</sup>) Tuesday of each month at a time and place to be posted forty-eight hours prior to the meeting.

Section 3. Special Meetings may be scheduled at the discretion of the Chairperson. The date, time, and location will be posted forty-eight (48) hours prior to the meeting. If an emergency meeting is required, the Board will follow the open meetings regulations for posting such a meeting.

Section 4. All meetings held by the Utility District are subject to the Open Meetings Regulations.

Section 5. On those issues requiring member approval, fifteen (15) Qualified Electors shall constitute a quorum. In the event that a quorum should not be reached at a meeting, the Board of Utility District the meeting will be rescheduled for another vote by the Qualified Electors.

Section 6. A Qualified Elector must present an appropriate in order to vote at any annual or special meeting.

## **ARTICLE VI – MONEY OF THE UTILITY DISTRICT**

Section 1. All moneys of the Utility District shall be paid to the Office of the Treasurer of the Utility District.

Section 2. Money shall be deposited into separate bank account or accounts established with the approval of the Board.

Section 3. All deposits of money shall be secured by obligations of the United States and/or the State of Rhode Island as required by the Act. The market value of the securities shall not be less than the amount of the deposits.

Section 4. Money in accounts shall be paid out with the approval of the Office of the Treasurer through normal banking practices.

## **ARTICLE VII – CODE OF CONDUCT**

Section 1. No Board member shall directly or indirectly engage or participate in proceeds of any contract or agreement to supply anything of value to or receive anything of value from the Utility District. This prohibition may be waived by a vote of four (4) of the commissioners if, and only if, the Board first obtains an opinion from the attorney general and/or the Rhode Island Ethics Commission based on full disclosure of all relevant facts that the waiver does not contravene state law and is in the best interests of the consumers served by the Utility District.

Section 2. The Board shall adopt a Conflict of Interest Policy. In the event that the Board is to make a decision that will result in a conflict between the interests of the Utility District and the

interests of an individual member of the Board, such member shall inform the Board of such conflict and shall abstain from voting on such decision. The Board may request a ruling from the Attorney General of the State of Rhode Island or RI Ethics Commission on any perceived conflict, and that ruling will be definitive.

#### **ARTICLE VIII – INDEMNIFICATION**

Section 1. This Utility District shall indemnify each current and former member of the Board, officer, manager, employee or agent, including, without limitation, members of Board committees who are not Board members, against expenses, including attorneys' fees, judgements, fines, and amounts paid in settlement actually and reasonably incurred, to the fullest extent of Rhode Island law, if:

- a. He or she conducted himself or herself in good faith; and
- b. He or she reasonably believed in the case of conduct in his or her official capacity with the Utility District, that his or her conduct was in its best interests and
- c. In all other cases, that his or her conduct was at least not opposed to its best interests and in the case of any criminal proceeding, he or she had no reasonable cause to believe his or her conduct was unlawful.

Section 2. A director is not indemnified under Section 1 in respect to any proceeding charging improper personal benefit to him or her, whether or not involving action in his or her official capacity, in which he or she has been adjudged to be liable on the basis that personal benefit was improperly received by him or her.

#### **ARTICLE IX – BYLAWS**

Section 1. These bylaws may be altered, amended and repealed and new bylaws adopted by the members of the Board at a regular or special meeting of the Board; provided, however, that prior to taking any such action, the Board shall provide notice of its intention to alter, amend, repeal, or adopt new bylaws and schedule a public hearing not less than thirty (30) days prior to adopting any such alteration, amendment, repeal or new adoption to describe the proposed change and take comment from Qualified Electors and members of the Board.

Approved: January 28, 2018

**AGENDA ITEM 3**  
**APPROVE REGULAR MEETING MINUTES**

# **DRAFT**

## **Block Island Utility District**

**November 21, 2020**

**11:00 AM**

HELD REMOTELY VIA ZOOM DUE TO COVID-19 AND TOWN OF NEW SHOREHAM  
EMERGENCY ORDER

### **Minutes**

Participating BOD Members Present via ZOOM: Everett Shorey, Bill Penn, Elliot Taubman and Mary Jane Balser (who joined at 1PM).

Absent: Barbara MacMullan

Also Present: President Jeffery Wright and Chris Warfel.

Vice-Chair Everett Shorey called the meeting to order promptly at 11:00 AM.

#### **1. Public Input**

- There was no public input.

#### **2. Commissioner's Report**

- Vice-Chair Everett Shorey extended the BOD's condolences to Bill Penn who lost his wife Sally recently. He then asked for a moment of silence in Sally's memory.
- Everett asked that the Board extend their thanks to the BIUD employees who had worked through the pandemic without any negative effect on BIUD operations and specifically called out BIUD Office Manager Tracy Fredericks for her work as rescue captain and her efforts given to the public COVID-19 testing. All BOD members commended the employees.

#### **3. Approve Meeting Minutes from the July 11, July 17 and October 10, 2020 meetings.**

- Bill Penn moved to approve all three sets of meeting minutes as presented. Elliot Taubman seconded the motion and the motion passed unanimously.

#### **4. Receive and Act on Treasurer's Report**

- Treasurer Bill Penn presented the YTD financials through 9/31/2020.
- Discussion included how the rate design changes affected the AR-Elect and Unbilled Revenue balances on the balance sheet.
- A question was asked about the Accounts Payable Trade. President Jeff Wright informed the BOD that he would research this with David Bebyn and email the BOD the answer (was due to a backlog off unbilled National Grid expenses).
- Elliot Taubman moved to accept the Treasurer's Report. Bill Penn seconded the motion and the motion passed unanimously.

**5. Receive a BI Solar Initiative Update**

- At 12:19 PM Tony Pappas joined the meeting and provided an update on the BI Solar Initiative's programs and progress. His presentation included updates on solar installs, mini-split HVAC offerings and the electric vehicle (EV) grants.
- Chris Warfel made several comments denouncing the programs.

**6. President's Update**

- President Jeffery Wright presented his report (on record) which included updates on sales, the TNS broadband project, efficiency plan, cell tower upgrade, a member complaint re: the system charge tariff and the SO/Transmission overcollections.
- Discussion was had regarding the complaint brought forth by Jeff Cowles which argued that the application of the system charge was counter to promoting renewable energy and asked that we address his concerns. After a lengthy discussion, the members present agreed with Mr. Cowles and recommended that we address it (exempting net metering customers from being subject to the charge) in our new net metering tariff when filed after the statute is changed.
- Discussion was had regarding the SO/Transmission overcollections. Mr. Wright explained that he and David Bebyn would be preparing a status report to be filed with the PUC. Prior to filing the status report, he and Mr. Bebyn would be having informal discussions with DPUC staff on to best handle the overcollection, recognizing that there were many options and all options would be explored with the DPUC staff. After a lengthy discussion, Bill Penn moved to recommend to the DPUC that we use the overcollections from the summer period to fund a restricted SO/Transmission reserve and adjust the rate going forward. Elliot Taubman seconded the motion and the motion passed unanimously.
- Bill Penn moved to accept the President's Report. Elliot Taubman seconded the motion and the motion passed unanimously.

**7. Pole Mount Solar Panel Pilot Program**

- President Jeffery Wright presented a pilot program of ten pole mount solar installations to be used as a test of wind tolerance and aesthetics. The pilot would use panels and mounts donated by the BI Solar Initiative. BIUD would install them using their internal labor.
- He cited a program implemented by PSEG in New Jersey as an example and showed photos of what the panels would look like.
- A discussion was had regarding HDC restrictions in the historic district that would prevent them from being installed at the power company. Mr. Wright suggested that they would be better located on the ends of circuits but wanted to be sure to put them in places to spur a public response.
- Elliot Taubman moved to approve the pilot program. Mary Jane seconded the motion and the motion passed unanimously.

**8. Review and Act Upon 2021 Operating and Capital Budgets**

- President Jeffery Wright presented the proposed 2021 operating and capital budgets stressing that both would be level funded compared to 2020.



- He acknowledged other capital projects that would be funded by debt through CFC (spare transformer, voltage conversion and employee housing) and explained that he would seek individual approvals for those projects as they were further developed.
- Mr. Wright asked the BOD for approval of the presented operating budget of \$5,525,999 and capital budget of \$400,000.
- Treasurer Bill Penn moved to approve both budgets as presented. Elliot Taubman seconded the motion. The motion was approved unanimously.

Elliot Taubman moved to adjourn the meeting at 1:25 PM, seconded by Bill Penn. The motion passed unanimously and the meeting was adjourned.

APPROVED: \_\_\_\_\_

POSTED: \_\_\_\_\_

# **DRAFT**

## **Block Island Utility District**

**December 12, 2020**

**11:00 AM**

**HELD REMOTELY VIA ZOOM DUE TO COVID-19 AND TOWN OF NEW SHOREHAM  
EMERGENCY ORDER**

### **Minutes**

Participating BOD Members Present via ZOOM: Barbara MacMullan, Everett Shorey, Bill Penn, Elliot Taubman.

Absent: Mary Jane Balser

Also Present: President Jeffery Wright, Tim Hebert (ENE), Ken Stambler (ENE), Dan Cuillo (ENE), Mike McElroy, Renee Meyers and Chris Warfel.

Board Chair Barbara MacMullan called the meeting to order promptly at 11:00 AM.

#### **1. Public Input**

- Chris Warfel voiced his concerns with two items:
  - i. Traffic control for recent BIUD pole replacement work.
  - ii. Dual meter systems for proposed new solar tariff.

#### **2. Receive Presentation from Energy New England (ENE): Power Supply 101 – A Start to Developing a Long-Term Power Supply Strategy**

- President Jeffery Wright introduced the ENE team of Tim Hebert, Ken Stambler and Dan Cuillo.
- Mr. Wright voiced his appreciation for all that ENE did for the BIUD and the expertise that they brought to the table. He explained that the ENE presentation (on record) was intended to be mostly educational but also was to start an ongoing discussion on power supply strategy – citing that there were no easy answers and that there were pros and cons to every supply and every contract type.
- He asked the BOD to consider the recent Governor's executive order requiring 100% renewables by 2030 and to consider how that would influence our procurement decisions going forward, despite being exempt from the RI RPS.
- ENE presented their materials (posted to the BIUD website) and a lengthy and robust discussion was had regarding the development of the BIUD procurement plan and how we could include as much flexibility as possible to allow for load following contracts, strip/block purchases and promised continued discussion on renewables as a portion of our supply. Mr. Wright committed to a follow up

discussion with ENE and the RI-OER regarding the renewable goals.

### **3. Review and Act on Standard Offer and Transmission Overcollection Filing**

- Mr. Wright presented a summary of the discussions with the DPUC staff regarding the overcollections. He explained the apparent support for a restricted reserve account and explained an idea that developed in those discussions pertaining to accelerating the retirement of the DSI fund in lieu of a rate adjustment. With Mike McElroy's help he detailed the filing that was prepared. A lengthy discussion amongst BOD members and a motion was made to proceed with the filing asking that the surplus be assigned to a restricted account and to accelerate the DSI retirement in lieu of making a rate adjustment.
- The motion to approve the filing was made by Elliot Taubman, seconded by Bill Penn and was passed unanimously.

Elliot Taubman moved to adjourn the meeting at 2:20 PM, seconded by Bill Penn. The motion passed unanimously and the meeting was adjourned.

APPROVED: \_\_\_\_\_

POSTED: \_\_\_\_\_

**AGENDA ITEM 4**  
**RECEIVE AND ACT ON TREASURES REPORT**

**Block Island Utility District**  
**Balance Sheet**  
**November 30, 2020**

**ASSETS**

	November 30, 2020	November 30, 2019
<b><u>Property and Equipment</u></b>		
Land	\$ 867,685.78	\$ 840,271.79
Buildings	550,224.70	464,663.03
Machinery & Equipment	1,923,142.83	1,973,972.46
Distribution System	2,437,427.16	2,027,645.93
Office System, Furniture & Fixture	288,964.68	273,068.10
Transportation Equipment	19,945.60	19,945.60
Construction Work in Progress-Distribution	742,922.21	640,256.48
Total Property and Equipment	6,830,312.96	6,239,823.39
Total Accumulated Depreciation	<444,064.62>	<176,638.00>
<i>Net Utilities Plant</i>	6,386,248.34	6,063,185.39
<b><u>Current Assets</u></b>		
Cash - Main Checking	1,122,598.29	1,019,364.28
Cash - Sweep Acct	89,826.15	(0.00)
Accounts Receivable Elect	63,945.93	71,670.07
Allowance For Bad Debt	(19,587.93)	(19,587.93)
Accounts Receivable-Other	3,683.50	6,246.39
AR-Cash due from BIPCo	17,039.12	6,422.12
AR-Blackrock Acct due from BIPCo	0.00	97,961.90
Unbilled Revenue	262,212.12	241,922.00
Plant Material & Operation	323,822.43	202,071.39
Fuel Inventory	45,439.02	55,827.45
Prepaid Expenses	77,063.96	87,753.99
Total Current Assets	1,986,042.59	1,769,651.66
<b><u>Deferred Assets</u></b>		
Def. Regulatory Asset-retiremt	202,750.88	197,585.35
Def. Regulatory Asset-Eng.Res	0.00	0.00
Def. Regulatory Asset-RateCase	106,838.77	0.00
Def.Regulatory Asset-Interconnection	97,123.76	156,181.76
Total Deferred Assets	406,713.41	353,767.11
Total Assets	\$ 8,779,004.34	\$ 8,186,604.16

**Block Island Utility District**  
**Balance Sheet**  
**November 30, 2020**

**LIABILITIES AND CAPITAL**

	November 30, 2020	November 30, 2019
<b><i>Current Liabilities</i></b>		
Accounts Payable Trade	\$ 235,564.36	\$ 359,667.51
AP-NISC Admin Software	0.00	0.00
A/P - Customer Deposits	89,905.90	70,271.32
Accrued Purchase Power Expenses	126,174.67	383,857.51
Accrued Other Expenses	10,118.21	31,840.05
DSI Surcharge Payable	0.00	11,744.80
Capital Fund	80,162.76	0.00
PPP Loan	149,837.00	0.00
Accrued Payroll and Withholdings	0.00	0.00
Total Current Liabilities	691,762.90	857,381.19
<b><i>Deferred Credits</i></b>		
Deferred Revenue	420,818.86	41,188.99
SOLAR RESTRICTED ACCOUNT	7,091.41	0.00
VOLTAGE CONVERSION RESTRICTED	42,022.00	0.00
SCR & Engine Maint Reserve	0.00	380,714.63
Total Deferred Credits	469,932.27	421,903.62
<b><i>Long-Term Liabilities</i></b>		
Line of Credit	0.00	0.00
Retirement Obligations	202,750.88	197,585.35
CFC Acquisition LOAN	5,695,825.58	5,800,000.00
Total Long-Term Liabilities	5,898,576.46	5,997,585.35
Total Liabilities	7,060,271.63	7,276,870.16
<b><i>Capital</i></b>		
Retained Earnings	815,649.00	(24,050.53)
Net Income	903,083.71	933,784.53
Total Capital	1,718,732.71	909,734.00
Total Liabilities & Capital	\$ 8,779,004.34	\$ 8,186,604.16

Block Island Utility District  
Income Statement  
For the Eleven Months Ending Novemberber 30, 2020

	Current Month Actual	Current Month Prior Year	Year to Date Actual	Year to Date Budget
<b>Revenues</b>				
<u>Revenue from Rates</u>				
Residential Sales	\$ 37,669.05	\$ 21,482.73	\$ 939,353.93	\$ 836,728.00
Commercial Sales	4,091.57	10,727.71	183,046.57	266,347.00
Demand Electric	23,494.88	38,084.60	896,212.20	949,950.00
Public Authority	-	7,049.38	31,166.93	35,805.00
Street Lighting	584.03	584.00	6,424.33	6,424.33
Customer Charge	22,708.00	26,449.87	268,302.16	273,148.00
Demand - All Rates	26,164.28	12,982.75	210,544.10	217,204.00
Efficiency Charges	-	-	56,388.36	56,063.00
System Charge	-	-	92,275.00	91,375.00
RI Renewable Fund	225.81	-	2,521.97	4,258.05
<u>Other Revenue from Operations</u>				
Grant Revenue-Solar Project	-	-	329,885.00	-
Biller Penalty (Interest on Delinquent Accts)	-	2,024.64	6,566.25	19,596.50
Rent - Antennas	18,891.68	15,891.71	207,808.48	207,808.08
Rent - Tower	800.00	800.00	8,800.00	8,800.00
Rent - Property	2,400.00	6,497.54	26,400.00	26,400.00
Misc. Income (Misc., Interest & Connections)	632.76	-	101,135.91	3,827.00
<b>Total Revenues</b>	<b>137,662.06</b>	<b>142,574.93</b>	<b>3,366,831.19</b>	<b>3,003,733.96</b>
<b>Expenses</b>				
Total Generation-Operating Expense	9,470.90	7,915.88	155,049.31	204,572.50
Total Generation-Maintenance Expense	2,428.74	5,695.10	91,002.38	160,141.67
Total Distribution-Operating Expense	15,917.89	9,302.33	181,754.02	313,748.42
Total Distribution-Maintenance Expense	10,280.16	5,490.41	259,441.40	333,112.08
Toatl Customer Accounts/Customer Service	4,804.80	5,856.33	62,189.05	61,191.17
Total Administrative/General Expenses	125,924.58	86,251.17	1,248,343.52	978,713.08
Total Depreciation Expenses	22,203.00	21,647.00	244,233.00	
Total Interest Exp on Line & Long- term debt	-	-	155,290.77	160,432.00
Total Miscellaneous Expense	2,083.13	960.51	7,490.94	112,453.00
Total Taxes	6,907.49	6,025.08	58,953.09	55,351.08
<b>Total Expenses</b>	<b>200,020.69</b>	<b>149,143.81</b>	<b>2,463,747.48</b>	<b>2,379,715.00</b>
<b>Net Profit Before Fuel Rev./Exp.</b>	<b>(62,358.63)</b>	<b>(6,568.88)</b>	<b>903,083.71</b>	<b>624,018.96</b>
<u>Fuel Expenses/(Revenue)</u>				
Fuel/Standard Offer/Transmission income	(141,840.28)	(124,520.35)	(2,224,690.18)	(1,865,908.00)
Purchase Power Expenses	176,848.39	161,495.31	1,928,998.72	1,809,888.00
Net SO/TC due to ratepayers	(35,008.11)	(36,974.96)	295,691.46	56,020.00
<b>Net Fuel Expense/(Revenue)</b>	<b>(0.00)</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Net Income</b>	<b>\$ (62,358.63)</b>	<b>\$ (6,568.88)</b>	<b>\$ 903,083.71</b>	<b>\$ 624,018.96</b>
<u>Reserves Expenditures</u>				
Remove Depreciation Adj (A)	(22,203.00)	(21,647.00)	(244,233.00)	-
Debt Service Principal (includes CAT)	-	-	78,245.92	85,203.00
Inventory Purchased	-	-	156,712.96	93,000.00
Capital Exp - Work In Progress	152,761.15	251,607.78	742,922.06	369,441.00
Capital Exp - Distrib Work	-	-	-	-
Capital Exp - Other Assets	-	-	-	-
<b>Total Reserve for Exp.</b>	<b>130,558.15</b>	<b>229,960.78</b>	<b>733,647.94</b>	<b>547,644.00</b>
<b>Net Income Cash Budgetary Basis</b>	<b>\$ (192,916.78)</b>	<b>\$ (236,529.66)</b>	<b>\$ 169,435.77</b>	<b>\$ 76,374.96</b>

Block Island Utility District  
Supplemental Information Statement  
For the Eleven Months Ending November 30, 2020

	November 2020	November 2019	YTD November 2020	YTD November 2019
<b>Rate Revenues</b>				
Residential Sales	\$ 37,669.05	\$ 21,482.73	\$ 939,353.93	\$ 592,541.37
Commercial Sales	4,091.57	10,727.71	183,046.57	196,547.79
Demand Electric	23,494.88	38,084.60	896,212.20	1,148,801.39
Public Authority	-	7,049.38	31,166.93	142,428.29
Street Lighting	584.03	584.00	6,424.33	6,419.12
Customer Charge	22,708.00	26,449.87	268,302.16	287,531.68
Demand - All Rates	26,164.28	12,982.75	210,544.10	398,308.09
System Charge	-	-	92,275.00	77,369.12
<b>Total Revenues</b>	<b>114,711.81</b>	<b>117,361.04</b>	<b>2,627,325.22</b>	<b>2,849,946.85</b>
	-2.26%		-7.81%	
<b>Rate Revenues -KWH Usage</b>				
Residential Sales	420,756	236,074	5,187,523	3,543,125
Commercial Sales	38,239	89,027	1,592,806	1,742,107
Demand Electric	293,686	349,400	5,189,668	6,240,899
Public Authority	-	70,238	972,263	1,628,449
<b>Total Revenues</b>	<b>752,681</b>	<b>744,739</b>	<b>12,942,260</b>	<b>13,154,580</b>
	1.07%		-1.61%	
<b>Rate Revenues -Customer Counts</b>				
Residential Sales	1,611	1,267	15,590	14,107
Commercial Sales	202	288	6,953	7,199
Demand Electric	145	362	6,290	7,575
Public Authority	-	33	5,088	5,404
<b>Total Revenues</b>	<b>1,958</b>	<b>1,950</b>	<b>33,921</b>	<b>34,285</b>

	November 2020	November 2019	YTD November 2020	YTD November 2019
<b>Payroll</b>				
<b>Capital Exp - Work In Progress</b>				
Capitalized Labor	\$ 13,810.31	\$ 21,892.00	\$ 114,062.38	\$ 142,298.19
<b>Generation-Maintenance Expense</b>				
Inside Maintenance	-	-	-	3,816.00
Maint of Station Equipment	6,939.84	5,207.04	128,052.18	120,303.11
<b>Distribution-Operating Expense</b>	-		-	-
Overhead lines	-	3,514.10	17,381.37	44,172.40
<b>Distribution-Maintenance Expense</b>	-		-	-
Overhead Lines	9,549.64	4,731.66	162,985.64	77,819.90
tree trimming	-	-	2,115.43	-
<b>Customer Accounts/Customer Service</b>	-		-	-
Records & Collections	4,804.80	4,487.00	55,610.86	56,622.80
<b>Administrative/General Expenses</b>	-		-	-
Vacation Pay	7,189.44	2,996.96	37,997.06	26,118.44
Holidays worked	2,179.04	2,089.44	19,140.16	14,597.20
Holidays not worked	-	-	-	-
Sick Leave	2,063.68	6,108.80	8,512.06	32,349.05
Personal time	-	-	3,640.01	3,141.24
CEO Salary	12,122.60	15,153.25	144,124.62	140,299.84
<b>Total</b>	<b>\$ 58,659.35</b>	<b>\$ 66,180.25</b>	<b>\$ 693,621.77</b>	<b>\$ 661,538.17</b>



## 2020 AUDIT SCHEDULE

2020 Financials Closed and Trial Balance Complete February 15, 2021

Audit Update Provided to BIUD BOD February 27<sup>th</sup>

Draft Audit Presented to the BIUD BOD March 27<sup>th</sup>

Audit Approved by the BIUD BOD – April 24<sup>th</sup>

Audit Submitted to CFC – Prior to April 30, 2021

**AGENDA ITEM 5**  
**RECEIVE AND ACT ON PRESIDENTS REPORT**

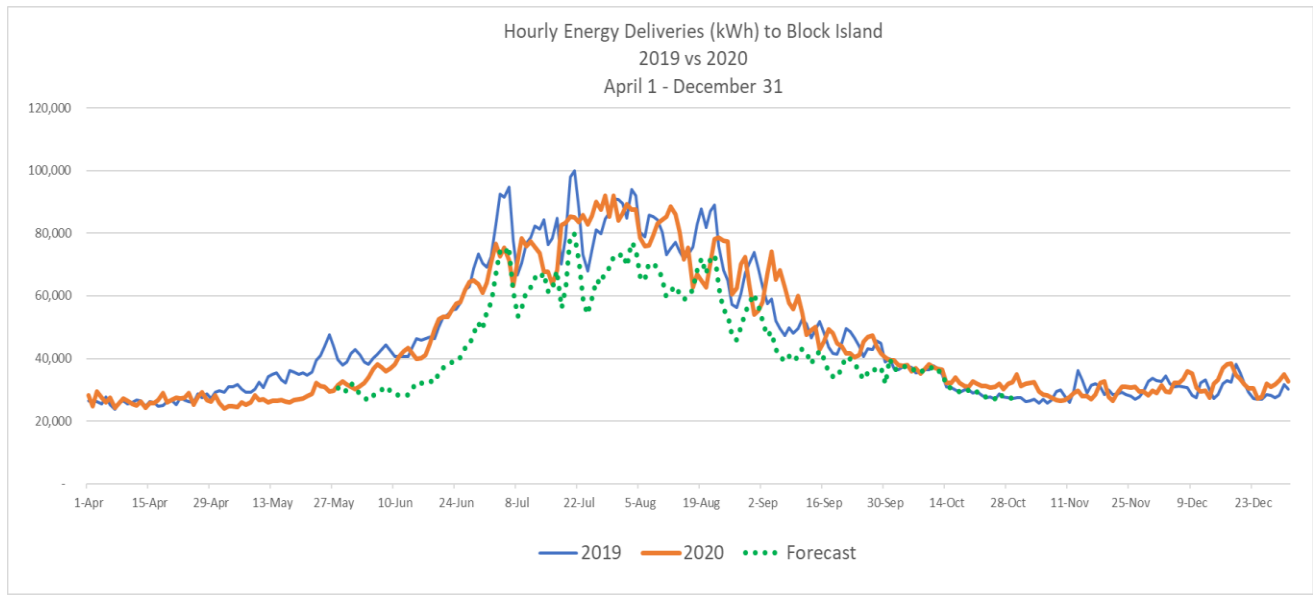
## PRESIDENT'S UPDATE

### JANUARY 21, 2021

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#### Sales Update

As shown in the chart below, electric sales recovered to a near normal level after about mid-July. Retail sales through the end of year are within 2%.



#### Standard Offer/Transmission Rate (Under/Over Collections)

Since filing our status update on December 7, 2020 we received and answered one round of discovery. One question asked was to provide an updated fuel cost estimate for the BITS cable outage in April. Dave's response is included below:

- 2021-2. Please provide an estimate for the cost of replacement fuel for the period April and/or May 2021 during which the transmission cable will be out of service. Please provide all assumptions.

#### RESPONSE:

The overall cost of the replacement fuel will depend on the duration of the outage. The range of the cost could run anywhere between approximately \$75,000 to \$325,000 depending if the outage runs between 2 week or 2 months. The calculations are supported by the attached schedule "Estimated Grid Usage".

The assumptions used in this schedule are similar to the prior year discussion of the Grid Outage. kWh is estimated using FY 2020 actual usage for the prior year same weeks Grid is expecting for

this years weeks of outage. Gallons are estimated using a 10kWh per gallon generation factor which is within the range of historical generation factors. The estimate also applies a credit for the savings on energy purchase which will be still charged as part of the standard offer rate.

Prepared by: David G. Bebyn, CPA

I believe this question relates to our request for a restricted reserve account which could be used to soften the impact from a FAC charge applied to the April billing if we are unable to make any more headway with National Grid.

We have had ongoing discussions with National Grid regarding the fuel cost for the outage and to date have made some progress with the help of the PUC but we still do not have what I would consider to be an acceptable commitment from National Grid. A recent meeting with their representatives resulted in an offer of \$30,000 to help pay for fuel. I voiced our appreciation but made it clear that we did not consider to be an acceptable offer. In that meeting we asked for routine updates on schedule, outage duration and cost. I have gotten one update since that meeting which included schedule and duration information but no cost update yet.

Their 1/20 Update is shown below:

Orsted

- Horizontal Direction Drill Pipe installation complete on 01/07/2021
- Installation of duct bank from South Parking Lot to North Parking lot to be coordinated with National Grid and targeted to be completed once NGrid drilling complete.
- Cable pull in Feb/ March

National Grid

- Drilling Commenced on 01/14/2021
- Pilot hole and Reaming completed on 01/20/2021
- HDD Pipe assembly anticipated to be complete by 01/22/2021
- Anticipate floating and install of HDD Pipe, week of 01/25/2021
- Cable pull March/ April

Outage

- Targeted for the first half of April 2021.

The best-case scenario given their offer is that the outage duration is limited to less than two weeks and the price of fuel remains low. The worst case is that the outage is extended due to problems splicing the cable and drags on any longer than 2 weeks.

I have requested a meeting their RI President and that is being set up now. We can discuss other options during our BOD meeting.

#### Net Metering Status

I do not any time estimate for when Rep. Filippi expects to present our statute amendment to the House Commerce Committee. We will continue to urge Blake to do what he can to get this passed this year. Once the House Committee hears this bill, we will prepare for one last review of our net metering tariff proposal and prepare to submit as soon as possible.

#### Champlin's Marina

BIUD was approached by the new owners during their due diligence process to discuss connecting to the utility power during the peak season. Champlin's currently takes power from BIUD up until about early to mid-June before they exceed our capacity limit (150 kW) and switch over to their own generators. They reconnect to BIUD usually in late September or early October. Their peak loads are roughly 800 kW. They asked us for a price to connect full time.

We provided an estimate to extend the New Harbor circuit up to the marina and to install a new interconnection at the marina that would supply up to 800 kW – AFTER we complete the voltage conversion. Our system could serve this load up to 800 kW with the newly constructed New Harbor circuit.

The drawing on the following page details the work scope, estimates and cost responsibility. This is a budgetary estimate only and will change based on firm bids, design type, etc.

Due to the level of increased sales this will create, we will probably want to update our COS study and consider a rate adjustment. The timeframe for that would be this fall potentially.



#### Cell Tower Upgrade

ATT has finished the upgrade design which includes adding 24 additional anchors. They have gone to bid for the work. After they select a contractor, we will determine cost shares for the tenants and authorize the construction. It is anticipated to take place in the spring.

#### Soil Remediation Update

We have been having ongoing discussions with DEM and finally met on Zoom last week to discuss the two acceptable options to remediate the soil contamination in the front of the property. We originally were proposing the excavation and removal of the contaminated soil. A second option considered was air-sparging that could accelerate the decomposition of the petroleum. This process could take 3-5 years and would subject us to ongoing maintenance. After our Zoom meeting we all agreed that the best solution is the full excavation, but we have open questions regarding reimbursements funded through the LUST fund. Procedurally, DEM will not reimburse costs above usual and customary which would expose us financially due to the location and high costs of working on the island. We are meeting again soon to have further discussions.

To put the project scope into perspective, the tank removal project involved removing five 20,000 gallon tanks and roughly 300 yards of contaminated soil. The scope we are looking at now is nearly 8X larger than what we faced with the tank project.

We are estimating 2,200 yards of soil will need to be excavated and shipped off island. We will need to bring in roughly 1,800 yards of clean backfill. The work will require a de-watering plan as we would be required to excavate below the water table. This involves large pumps, portable tanks and filtration. Moving this amount of soil will involve barges and large scale trucking efforts on the mainland and on the island. The town barges in 1,100 yards of gravel over at a time for their road projects so the scope is not insurmountable. It is, however, intimidating due to the impacts to the property and the amount of equipment necessary and the cost to complete the project.

The BOD will be asked to approve the plan once we determine the full scope and cost and have some assurance of what the LUST fund will cover. I will ask our consultants to be available for that meeting.

#### Power Supply and Procurement Plan

From a regulatory perspective I believe we will file our plan at the end of March along with our EE plan and SO/Transmission reconciliation, similar to how PASCOAG manages their filings. This is of course subject to check with the PUC.

Before our next BOD meeting, we will draft our plan testimony and present it for discussion. Prior to drafting the testimony, we will meet with Nick Ucci from RI-OER to fully understand the state's renewable goals. Mike Kirkwood and the ENE team will be participating on that call as well. We may want to consider dedicating a full special meeting to this topic given its importance.

**AGENDA ITEM 6**  
**REVIEW AND ACT UPON DOE GRANT OPPORTUNITY AND**  
**BIUD/RI-OER PARTNERSHIP**



INSERT DOE GRANT CONCEPT PAPER

INSERT DOE GRANT CONCEPT PAPER

INSERT DOE GRANT CONCEPT PAPER

INSERT DOE GRANT CONCEPT PAPER

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**AGENDA ITEM 7**  
**RECEIVE UPDATE ON EFFICIENCY PLAN**  
**AND REVIEW PLAN**

### EFFICIENCY PLAN UPDATE

Our Efficiency (EE) Plan needs to be reviewed, updated, approved by the BIUD BOD and filed for approval every year. It is important to ask for member feedback/input as part of this process.

Our plan period runs concurrently with our standard offer and transmission rates filings which are May 1<sup>st</sup> through April 30<sup>th</sup> the following year. This time-period coincides with our surcharge collections of May – October.

We will file the revised plan at the end of March along with our Standard Offer and Transmission rate adjustment. This is mostly to combine hearing dates and schedules and to keep May 1<sup>st</sup> as consistent date for any rate changes that we may make.

The schedule below details the reviews, BOD approvals and regulatory milestones.

January 23<sup>rd</sup> BOD Meeting – Discuss the EE Plan filing process.

February 27<sup>th</sup> BOD Meeting – Take public comment and make suggested changes to EE Plan.

March 27<sup>th</sup> BOD Meeting – Approve Final EE Plan (Approve SO/Trans rates at same time)

March 30 – Filing Deadline

Last Week of April – EE Plan, SO and Transmission PUC Hearings

EFFECTIVE DATE – May 1, 2021

### PROPOSED CHANGES FOR THE 2021 EE PLAN

Our EE Plan is in its infancy, having just started in the past four months. Therefore, Nathan Cleveland and I are recommending we make very minor changes to the 2021 plan so we can gather more data and experience with the current plan. There are some lessons learned from the PASCOAG plan that Nathan is suggesting we make, but only change the budget plan to allow us more flexibility to shift funds within the approved budget and to maybe make some budget changes now to reflect what experience we do have.

We will work on editing the plan and will provide a red-lined version for discussion in our February meeting.

I've attached the approved 2020 EE Plan for your review prior to the next meeting.

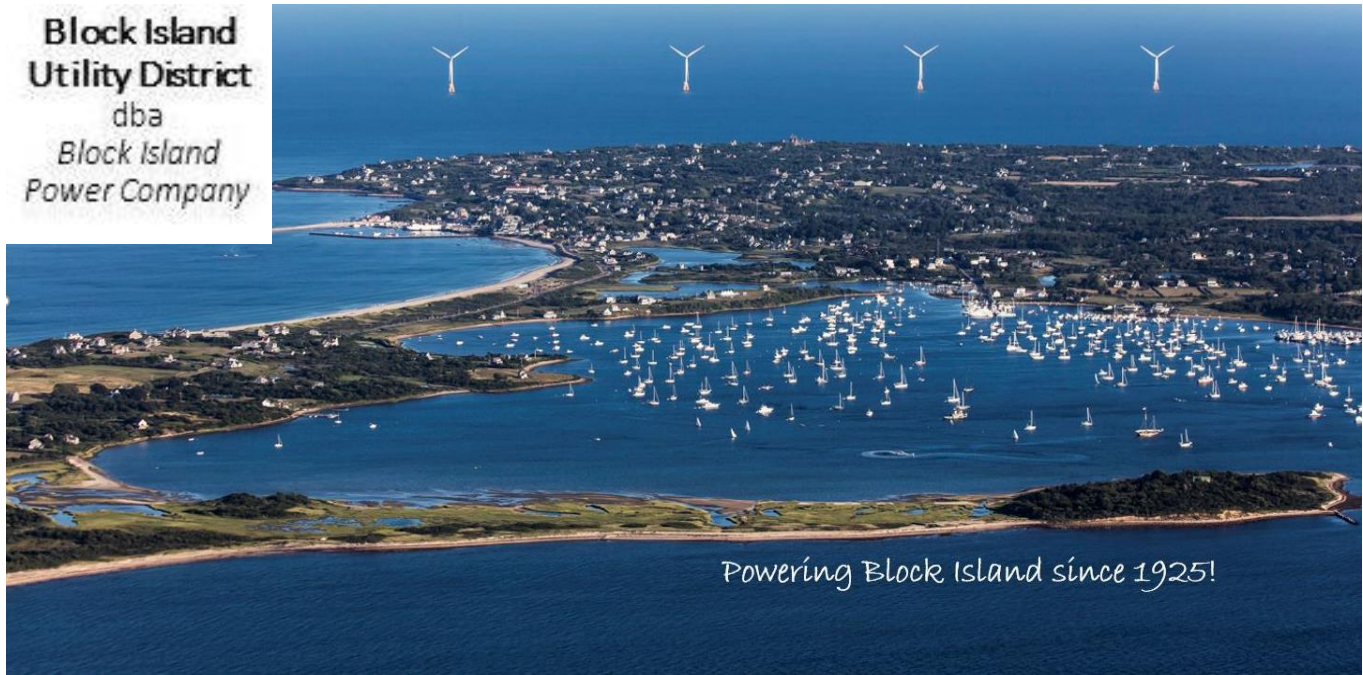
2020 PLAN ACTIVITY

The plan activity through 12/31/2020 is shown below. There are 11 more audits scheduled at this time.

<b>EE Plan Activity</b>		
	<b><u>Nov</u></b>	<b><u>Dec</u></b>
Audits	4	3
<u>Direct Installs</u>		
LED Lights	39	36
Power Strips	3	6
Grounded Power Strip	3	0
Faucet Aerators	7	0
Showerheads	2	2
Hand-Held Shower Heads	0	1
ENE Cost	\$ 1,583	\$ 1,353
Rebates	\$ -	\$ -



**Block Island  
Utility District**  
dba  
*Block Island  
Power Company*



## **Demand Side Management 2020 Plan**

Block Island Utility District  
100 Ocean Avenue  
Block Island  
New Shoreham, RI 02807  
(401) 466-5851

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## **Block Island Utility District – 2020 Demand Side Management Plan**

### **1. Introduction and Background**

Demand side management (DSM) is important because it can provide benefits to both customers as well as the electric grid. The Block Island Utility District (BIUD, the District) is proposing to establish a DSM program to provide its 1,900 customers access to energy efficiency programs that will benefit them and improve the service and reliability of the island's electric grid. A DSM program provides access and incentives for measures that allow customers to optimize their energy usage and reduce their utility bills. Reducing energy usage, particularly during peak seasons or times of day, can also have substantial benefits such as reduced grid maintenance and capital expenditures, reduced peak charges for customers, and greater service reliability.

Block Island is a unique community because of its geographic separation from the mainland and its variable, tourist-driven seasonal usage profile. The community of New Shoreham and the grid that serves it needs to be flexible enough to handle the increased summer population, as well as reliable and resilient enough to provide service to the year-round residents and businesses, even in the face of harsh winter conditions.

Given Block Island's unique size, location, and seasonal usage spike, demand management is especially important for this community and aligns with many of BIUD's goals outlined in the proposed rate case filing (Docket #4975). Specifically, through the implementation of this proposed DSM plan, BIUD aims to empower its customers to make choices that help control their energy usage, reduce energy burden<sup>1</sup> on customers, improve resource allocation, and encourage the adoption of innovative new technologies that maximize the benefits of Block Island's smart meters. By supporting the filing of this proposed DSM plan, the BIUD Board seeks to deliver energy efficiency program benefits to all BIUD customers.

The proposed 2020 DSM plan for the Block Island Utility District represents an evolution of prior energy efficiency work conducted in New Shoreham through the *Block Island Saves* pilot program. The *Block Island Saves* program ran from 2015-2017 and was administered and funded solely by the Rhode Island Office of Energy Resources. The BIUD, working in collaboration with the Office of Energy Resources (OER), drafted this proposed DSM plan as a robust iteration on the original *Block Island Saves* pilot. The DSM programs described below leverage best practices from the *Block Island Saves* program as well as Rhode Island's nation-leading mainland efficiency programming and are intended to address the unique needs of the Block Island community.

The original *Block Island Saves* program began as a pre-pilot program with the support of the New Shoreham Town Council, fully managed and funded through OER. The pre-pilot was

<sup>1</sup> Energy burden is the percentage of household income spent on home energy bills.

conducted to test energy efficiency programs on Block Island and recruit a small group of pre-pilot participants. Of the 24 pre-pilot applications received, ten residents and five businesses were selected to participate in the pre-pilot (those not selected were later able to participate in the full pilot).

Pre-pilot participants received a free energy assessment of their home or business, followed by a list of recommendations for energy efficiency improvements and access to associated rebates or incentives. Overall, the pre-pilot program incentives and rebates were evaluated by OER to be cost-effective and successful in motivating participants to install energy-efficient measures. The success of the pre-pilot in terms of participation, interest, opportunities, and cost-effectiveness prompted the expansion of the pre-pilot program to a full-scale pilot.

Program offerings in the full pilot were identical to the pre-pilot phase. During the full-pilot phase, 110 additional home and business energy assessments were conducted. Program participants were able to save 313 MWh of electricity, 271 MMBtu of oil, and 136 MMBtu of propane annually. Participants were also able to decrease their energy bills, saving in aggregate \$597,968 (residential) and \$714,396 (business) over the lifetime of the efficiency upgrades.

Following the completion of *Block Island Saves*, OER conveyed lessons learned to both the BIUD Utility and the public through a report which is available on the OER website<sup>2</sup>. This proposed 2020 DSM plan incorporates recommendations from OER's report and continues several elements from the successful *Block Island Saves* program, such as the no-cost assessments with direct install measures and incentives for weatherization. Based on the interest and adoption of those measures during the pilot the following proposed DSM programs include those same elements as a foundation for 2020. The proposed plan also seeks to prepare New Shoreham residents for the changing energy landscape by promoting the installation of newer, highly efficient heat pump equipment, programmable thermostats, and weatherization measures.

A significant difference between the proposed 2020 plan and the pilot is the expansion and enhancement of the HVAC and water heating programs. The proposed DSM plan includes an incentive for the adoption of high-efficiency heat pump systems as well as heat pump water heaters. In combination with the newly proposed rate structure (described below in section 2.B), the District feels that the adoption of heat pumps for heating and cooling needs will be an attractive option for customers that provides significant energy and cost savings.

Heat pump technology is an important tool in helping BIUD smooth out the current load curve, minimize increasing summer demand caused by a growing number of air conditioning installations, and can provide opportunities for customers to reduce their overall energy burden. In addition to aligning with the District's goals for its customers, offering incentives for heat pumps can also help Rhode Island to meet its Greenhouse Gas Emission goals while ensuring that New Shoreham residents and businesses receive the same, if not enhanced, opportunities for improved comfort and energy savings as other Rhode Islanders.

<sup>2</sup> <http://www.energy.ri.gov/documents/archived-reports/Block%20Island%20Saves%20Pilot%20-%20Full%20Report%20-%20April%202018.pdf>

Block Island Utility District respectfully requests that the Public Utilities Commission (PUC) approve this 2020 Demand Side Management plan and its associated use of ratepayer funds, in its entirety, as outlined below.

## **2. DSM Categories, Proposed Budget Allocation, Cost Recovery, and Estimated Benefits**

The proposed budget for the Block Island DSM programs is broken into three major categories – Assessment and Installation, Inspection and Program Administration, and Customer Outreach.

In the Assessments & Installation category, there are programs for Residential energy assessments and weatherization; Residential HVAC and water heating; Business energy assessments, lighting, and weatherization; and Business HVAC and water heating. The distinction between Residential and Business programs will allow BIUD to track the distribution of costs and benefits within and between the two distinct customer segments. This budget category, overall, contains the full costs of energy assessments at homes and businesses, including the direct installation of measures such as LED lightbulbs, smart power strips, and low-flow showerheads, as well as rebates for additional measures such as weatherization and efficient HVAC equipment. As a result, the bulk of the proposed DSM budget exists within this category.

The Inspection and Program Administration category includes the cost of inspections for any residential weatherization and/or HVAC measures installed through the DSM programs, as well as any business direct install measures, weatherization, or other energy efficiency measures installed through the programs. It is important to verify the proper installation of deeper measures so customers will reap the full benefits of the measure. Further, to support insightful reporting to the Public Utilities Commission, inspection and verification is expected to enhance the accuracy of energy savings calculations, in addition to ensuring customer satisfaction and realization of expected energy savings. Since the District is re-establishing efficiency programming with this proposed DSM plan, start-up costs are perhaps higher than they may be in subsequent years. Coupled with the high cost of travel to/from Block Island, this has led to increased costs in this budget category relative to more mature DSM programs or more readily accessible areas. The District is committed to working with vendors and other partners to find ways to drive these costs down as much as is feasible in future program years, through more efficiency program delivery, engaging more local service providers, or other ways that may present themselves as the programs mature.

Funds for the efficiency consultant BIUD proposes to hire are also encompassed in the Inspection and Program Administration budget category. The efficiency consultant will assist the District in administering the DSM programs, managing the tracking and reporting of data, processing incentive rebates, and making suggestions for future program development. Additionally, the efficiency consultant will assist the District in developing a cost-effectiveness framework and evaluating program performance, consistent with Docket # 4600 principles and directives.

Lastly, the Customer Outreach budget category covers the costs of promoting the DSM programs. The proposed spending on program outreach will encourage BIUD customers to participate in the DSM programs, and will inform them on, how to participate and what benefits can be expected.

Using the *Block Island Saves* results, the average BIUD customer saved 2.84 MWh of electricity, 2.46 MMBtu of oil, and 1.24 MMBtu of propane annually through that program. Based on the estimated participation numbers for the proposed 2020 DSM plan, the District estimates that this plan could deliver approximate annual savings of 115 MWh of electricity, 100 MMBtu of oil, and 50 MMBtu of propane. Actual savings numbers depend on the exact measures installed by customers and the specific fuel types they utilize, among other factors, but this provides some scope as to the significant energy benefits BIUD customers can realize through this plan.

A. Proposed 2020 Budget Allocations

The budget numbers included below are based on actual project costs and participation levels from the *Block Island Saves* pilot program. Adjustments to those numbers are based on anticipated participation numbers and changes in unit costs since 2017 when the pilot concluded.

Table 2.1 Proposed 2020 DSM Plan Budget Allocations		
<b><u>Budget Category</u></b>	<b><u>Proposed Budget</u></b>	<b><u>Notes</u></b>
<i><u>Assessment &amp; Installation</u></i>		
Residential Assessments and Weatherization	\$45,350.00	Energy Assessments & Weatherization
Residential HVAC & Water Heating	\$7,700.00	Programmable Thermostats; Heat Pump Water Heaters; Heat Pump Heating & Cooling Systems; Weatherization Bonus
Business Assessments, Lighting, and Weatherization	\$27,600.00	Energy Assessments, Lighting Measures, and Weatherization
Business HVAC & Water Heating	\$5,000.00	Programmable Thermostats; Heat Pump Water Heaters; Heat Pump Heating & Cooling Systems
<b>Total</b>	<b>\$85,550.00</b>	
<i><u>Inspection and Program Administration</u></i>		
Inspection Services		Inspections for Residential Weatherization; Business Direct Install measures, Lighting, and Weatherization
Program Administration		Efficiency Consultant Services
<b>Total</b>	<b>\$29,200.00</b>	
<i><u>Customer Outreach</u></i>		
<b>Total</b>	<b>\$5,250.00</b>	Advertising in Local Publications, Bill Inserts, Online, and in Community Bulletin
<b>Total Budget</b>	<b>\$120,000.00</b>	

## B. Cost Recovery and Other Funding Sources

Block Island Utility District, through its new rate case in Docket # 4975, has proposed a new rate design with implications for the demand side management plan and its budget. The current rate structure is a two-tier structure with peak and off-peak seasonal rates for all customer classes. In its proposed rate case, BIUD has suggested implementing a three-tier rate structure with peak, shoulder, and off-peak rates for all customer classes as well as an efficiency surcharge.

Table 2.2 - Current Block Island Utility District Rate Structure											
OFF-PEAK					PEAK				OFF-PEAK		
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC

Table 2.3 - Proposed Block Island Utility District Rate Structure											
OFF-PEAK				SHOULDER		PEAK		SHOULDER		OFF-PEAK	
JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
				\$ .00395/kWh		\$ .01/kWh		\$ .00395/kWh			
				EFFICIENCY SURCHARGE							

Through the proposed rate redesign, BIUD estimates it will generate approximate revenues of \$60,000 from the efficiency surcharge during the calendar year, which will support DSM program implementation in 2020. The breakdown of efficiency surcharge collection was provided in Docket # 4975 and estimates collections as follows: ~\$24,000 from residential customers, ~\$6,000 from business customers, and ~\$30,000 from the general service rate, which comprises larger residential users as well as some business customers. The Office of Energy Resources will supplement the budget for the DSM programs with Regional Greenhouse Gas Initiative (RGGI) proceeds. OER has committed a total of \$180,000 in RGGI proceeds to be provided over the course of three years, beginning in 2020, to help support BIUD's DSM programming in conjunction with annual, collected efficiency surcharge monies.

### 3. Detailed Program Descriptions

#### A. Residential Offerings:

Refer to Table 2.1 for full program budget; residential subsection reproduced below.

Table 3.1 – Assessment and Installation Category – Residential Programs		
Program	Proposed Budget	Estimated Quantities & Notes
Residential Assessments and Weatherization	\$45,350.00	36 Energy Assessments & 8 Weatherization
Residential HVAC	\$7,700.00	36 Programmable Thermostats; 6 Heat Pump Water Heaters; 6 Heat Pump Heating & Cooling Systems; 2 Weatherization Bonus

#### i. Home Energy Assessments

Residential energy assessments with no-cost direct install measures are critical for households to reduce energy use, lower their energy costs, and identify opportunities for additional, deeper savings. The home energy assessment is a focal point of the proposed DSM plan as it allows for



the comprehensive evaluation of the residential building stock, direct installation of energy saving measures (e.g. LED light bulbs, smart power strips) and the opportunity to identify deeper savings opportunities such as weatherization or HVAC equipment upgrades. Assessments often serve as the initial contact point for customers and what the District hopes is the start of an ongoing, beneficial relationship with the customer as they become more aware of their energy use and seek to make continual energy improvements to their home.

Each home energy assessment, conducted by a BPI certified energy assessor, will include a whole-home evaluation, a blower door test to check for proper air sealing, a heating system safety test to check the health and safety of the equipment, and a number of direct install measures (outlined in the following section) that the assessor will install during the visit. At the conclusion of the assessment, the customer will receive a home energy action plan outlining additional energy savings measures they can implement, the estimated costs, and BIUD incentives associated with those measures, as well as information and tips on how to better manage their energy use and reduce costs. These comprehensive assessments are provided to the customer free of charge and are open to all residential BIUD customers.

ii. Direct Install Measures

As part of the Home Energy Assessments, each energy assessor will install a number of energy saving measures in each home, as needed, at no cost to the customer. The proposed 2020 DSM plan proposes the following direct install measures:

Table 3.2 – Proposed Direct Install Measures and Incentives			
Measure	Estimated Quantities	Incentive Level	Notes
LED Lightbulbs	432	Free	No limit; expect 12 per assessment
Smart Power Strips	72	Free	Maximum of 2 per assessment
Low-Flow Shower Heads	36	Free	Expect 1 per assessment
Aerator faucets	50	Free	Expect 1.5 per assessment

LED Lightbulbs – installed in place of existing incandescent or CFL bulbs throughout the home, any number of bulbs can be replaced during the assessment.

Smart Power Strips – up to two (2) smart power strips that help reduce electricity usage of devices that would otherwise be constantly using electricity.

Faucets and Showerheads – Low-flow showerheads and aerator faucets that help reduce water and energy usage, any number can be installed throughout the home during the assessment.

These low-cost measures are proven energy saving devices that provide immediate benefits to customers who have a home energy assessment completed.

### iii. Weatherization Measures

One of the outcomes BIUD expects to achieve with its proposed DSM program is to educate customers about the benefits of weatherization and to properly incentivize them to undertake these measures. Residential customers with weatherization opportunities will learn of these opportunities through the home energy action plan provided at the conclusion of the assessment, as well as given information about potential costs and incentive levels that BIUD offers.

Weatherization benefits include increased comfort to occupants year-round - warmer in the winter and cooler in the summer - as well as reduced energy usage and costs. Many homeowners deal with high energy bills year-round without realizing that proper weatherization techniques can meaningfully reduce their bills. The proposed DSM plan offers the following options as part of the weatherization program:

Table 3.3 – Proposed Weatherization Measures and Incentive Levels		
Measure	Incentive Level	Notes
Air Sealing	Up to 10 labor hours free (\$800 value) plus 40% off further sealing, up to \$2,000 in total weatherization costs	Based on pilot rebate levels and expected home energy assessment numbers
Duct Sealing		
Insulation		
Pipe Insulation		
Weatherization Bonus	\$250	For customers who insulate <u>and</u> install a heat pump system

Air Sealing – Sealing air leaks in and around windows and doors to reduce the loss of heated or conditioned air.

Duct Sealing – Sealing of leaks around ductwork to ensure that all heated or conditioned air enters the living spaces and is not lost in the walls/ceilings or to the outside.

Pipe Insulation – Improving insulation around water pipes to reduce heat loss and protect against pipe freezing during the winter months.

Insulation – Installing improved insulation in the walls, ceilings, and floors of the home to improve the building envelope, leading to increased comfort as heated or conditioned air remains in the home rather than escaping outside.

An additional feature for residential customers is a weatherization bonus. Customers can receive an additional \$250 rebate if they bundle insulation work alongside the installation of a heat pump heating and cooling system. BIUD is proposing to offer this bonus incentive because of the benefits that come from weatherizing a home properly, especially in conjunction with efficient operation of a heat pump system.

#### iv. HVAC Measures

The home energy action plan will also provide information to customers about opportunities to upgrade inefficient heating and cooling equipment in the home. The HVAC offerings aim to promote the adoption of high-efficiency heat pump systems for heating and cooling as well as heat pump water heaters. Electrifying heating and cooling is an important step in reducing greenhouse gas emissions and is supported by the District's recently proposed three-tier rate structure, which includes a lower winter electricity price that makes the adoption of electric heating measures more cost effective for customers. Additionally, the adoption of programmable thermostats gives residents the ability to better control and monitor their energy usage and save money.

It is proposed that incentives for the following equipment, at the following levels, be offered as part of the Residential HVAC program:

<b>Table 3.4 – Proposed HVAC and Water Heater Measures and Incentives</b>				
<b>Equipment</b>	<b>Rating</b>	<b>Estimated Quantity</b>	<b>Proposed Rebate</b>	<b>Notes</b>
Central Heat Pump	<b>SEER</b> $\geq 15$ ; <b>HSPF</b> $\geq 9$	2	\$250 per ton	Seasonal Energy Efficiency Rating (SEER) measures air conditioning and heat pump cooling efficiency. A SEER rating is a maximum efficiency rating, similar to the miles per gallon for a car.  Heating Seasonal Performance Factor (HSPF) is used to measure the efficiency of heat pumps and the higher the HSPF the more efficient the system.
Ducted or Mixed Ducted Mini-Split Heat Pump	<b>SEER</b> $\geq 15$ ; <b>HSPF</b> $\geq 9$	2	\$250 per ton	
Ductless Mini-Split Heat Pump	<b>SEER</b> $\geq 15$ ; <b>HSPF</b> $\geq 10$	2	\$150 per ton	
Heat Pump Water Heaters	ENERGY STAR $\leq 55$ gallon; should have a minimum UEF of 2.00	4	\$300 rebate	Uniform Energy Factor (UEF) is a new metric for determining the energy efficiency of a water heater utilized by the Department of Energy. The higher the UEF, the greater the equipment's efficiency and the lower the energy bill.
	ENERGY STAR $>55$ gallon should have a minimum UEF of 2.70	2	\$150 rebate	Uniform Energy Factor (UEF) is a new metric for determining the energy efficiency of a water heater utilized by the Department of Energy. The higher the UEF, the greater the equipment's efficiency and the lower the energy bill.
Programmable Thermostats		36	\$25 Rebate	
*Rebate not to exceed \$750 per customer for this program (excluding thermostats).				

Block Island Utility District wants to promote the adoption of high-efficiency electric heat pumps through an incentive structure that will be based on a per-ton amount. This structure is more flexible than a flat rate amount and allows the incentive to vary appropriately with the proper sizing of heat pump systems to various home configurations and sizes. Additionally, if the newly proposed three-tier rate structure with lower winter electric rates is approved by the Commission, BIUD anticipates that the combined new rate structure and DSM incentives will drive adoption of heat pump technologies which will save customers energy and money.

Qualifying units must meet the SEER and/or HSPF ratings specified for each system type, which align with the efficiency ratings contained in the Northeast Energy Efficiency Partnerships (NEEP) cold climate heat pump specification list and is considered the industry standard for this technology.

Alongside the incentive for heat pump based heating and cooling systems, the District also proposes incentives for heat pump water heaters. Given the smaller variation in equipment size, associated energy savings expected, and to align closely with other Rhode Island efficiency programs, BIUD will be offering flat rate incentives of \$300 and \$150 for heat pump water heaters, based on size. Units 55 gallons and smaller use less energy than larger units and thus provide a greater opportunity for energy savings. Therefore, BIUD proposes to provide a higher incentive for these units compared to units over 55 gallons in size. Qualifying units will have a minimum uniform energy factor (UEF) of 2.0 for the smaller units and a minimum UEF of 2.7 for the larger systems. ENERGY STAR heat pump water heaters can save the average household \$330 per year and 2,690 kwh compared to a standard electric hot water heater, so these units represent a great opportunity for savings.

Because heat pump technology is still new and because the pilot program on Block Island did not include heating and cooling heat pump systems as part of the incentive structure, the District is proposing to cap the incentive level at \$750 per customer for these measures initially. BIUD wants to strike a balance between providing a reasonable incentive to drive adoption of this technology alongside the ability to provide some incentive to a larger number of customers who may be interested in taking advantage of this opportunity. Because there is not reliable historical data from the pilot program for these measures, setting a cap will help the District to serve both of these goals.

The District will also incentivize programmable thermostats through the residential HVAC and water heater program. Programmable thermostats are a useful piece of technology to help manage a home's energy usage efficiently and conveniently. BIUD is proposing a \$25 rebate to customers who purchase a programmable thermostat.

Customers who install weatherization or HVAC measures will be given their rebate after work has been completed and inspected. BIUD will offer rebate forms to customers both online and in person at the BIUD office and will require customers to provide proper documentation from the contractor who performed the job, in the form of a receipt or work order. Customers submitting rebates for eligible thermostats need only provide a purchase receipt as proper documentation with their rebate form. If a customer has any problems or questions regarding a rebate form, their contractor may be able to help complete relevant fields, and customers can always reach out to BIUD staff for assistance during business hours.

#### B. Business Offerings:

Refer to Table 2.1 for full program budget; business subsection reproduced below.

Table 3.5 – Assessment and Installation – Business Budgets		
Program	Proposed Budget	Notes
Business Assessments, Lighting, and Weatherization	\$27,600.00	Energy Assessments, Additional Lighting Measures, and Weatherization
Business HVAC & Water Heating	\$5,000.00	Programmable Thermostats; Heat Pump Water Heaters; Heat Pump Heating & Cooling Systems

i. Business Energy Assessments

As with the residential offerings, the initial no-cost energy assessment for business and commercial customers is a foundational focus of the proposed business DSM programs. Comprehensive evaluations of the commercial spaces of New Shoreham will be conducted by a qualified energy assessor who will also directly install measures that provide immediate savings and deliver a comprehensive energy action plan to the customer with recommendations for additional savings measures. Providing these free, no-obligation energy assessments also allows BIUD to establish an ongoing relationship with business customers as they pursue energy efficiency improvements.

Each business energy assessment, conducted by an energy assessor, will include a whole-business evaluation of the electrical equipment and thermal systems as well as directly installing screw-in LED lightbulbs, as appropriate. At the conclusion of the assessment, the customer will receive a business energy action plan outlining additional energy savings measures they can implement, the estimated costs, and BIUD incentives or rebates associated with those measures, as well as information and tips on how to better manage their energy use and reduce costs. These comprehensive assessments are provided to the customer free of charge and are open to all BIUD business customers.

Because the number of business participants in the *Block Island Saves* pilot was small, and the business community on the Island is limited, it makes accurately estimating demand for specific measures more challenging than the residential program. The District is estimating six business assessments will be conducted in the initial program year and that from those assessments' customers will pursue some additional deeper efficiency measures, be that additional lighting, weatherization, or HVAC upgrades. The District has set a budget that anticipates that half of the business customers will pursue additional measures of some kind.

ii. Direct Install and Other Lighting Measures

Table 3.6 – Proposed Business Direct Install and Other Lighting Measures and Incentives			
Measure	Estimated Quantities	Incentive Level	Notes
Screw-in LED Lightbulbs	60	Free	No limit; expect 10 per assessment
LED fixture upgrades	12	75% of costs covered	Expect an average of 2 per assessment
Lighting controls	6		Expect an average of 1 per assessment
Occupancy sensors	12		Expect an average of 2 per assessment

As part of the business energy assessments, each energy assessor will install screw-in LED lightbulbs in as many fixtures as needed throughout the property. BIUD recognizes that many business environments have different lighting needs from residential customers, and screw-in LED lightbulbs may not upgrade the entirety of the lighting for a given business, and therefore it is proposed that incentives for additional lighting measures be offered as well. Upgraded fixtures, lighting controls, and lighting sensors (such as occupancy sensors) will be listed on the energy action plan as an additional energy saving measure that customers can pursue, and approved equipment will be incentivized at 75% of total cost.

iii. Weatherization Measures

One of the outcomes BIUD expects to achieve with its proposed DSM plan is to educate customers about the benefits of weatherization and to properly incentivize them to undertake these measures. Business customers with weatherization opportunities will learn of these opportunities through the energy action plan provided at the conclusion of the energy assessment.

Weatherization benefits include increased comfort to occupants year-round - warmer in the winter and cooler in the summer - as well as reduced energy usage and costs. Many business owners deal with high energy bills year-round without realizing that proper weatherization techniques can meaningfully reduce their bills. The proposed DSM plan offers the following options as part of the business weatherization program:

Table 3.7 – Proposed Business Weatherization Measures and Incentive Levels		
Measure	Incentive Level	Notes
Air Sealing	Up to \$1,200 in free air sealing plus 40% off further sealing, up to \$4,200 in total weatherization costs or up to \$3,000 in insulation costs	Based on prior rebate levels and expected business energy assessment numbers
Duct Sealing		
Insulation		
Pipe Insulation		

Air Sealing – Sealing air leaks in and around windows and doors to reduce the loss of heated or conditioned air to the outside.

Duct Sealing – Sealing leaks around ductwork to ensure that all heated or conditioned air enters the living spaces and is not lost in the walls/ceilings or outside.

Pipe Insulation – Improving insulation around water pipes to reduce heat loss and protect against pipe freezing during the winter months.

Insulation – Installing improved insulation in the walls, ceilings, and floors of the home to improve the building envelope, leading to increased comfort as heated or conditioned air remains in the home rather than escaping outside.

#### iv. Business HVAC Measures

Business customers have more varied building uses and often utilize larger equipment to support their operations. In order to ensure that the business customers of BIUD have opportunities to upgrade to more efficient equipment where appropriate, incentives for the following measures are proposed:



<b>Table 3.8 – Proposed Business HVAC and Water Heater Measures and Incentives</b>			
<b>Equipment</b>	<b>Rating</b>	<b>Proposed Rebate</b>	<b>Notes</b>
Central Heat Pump	<b>SEER</b> ≥15; <b>HSPF</b> ≥9	\$250 per ton	Seasonal Energy Efficiency Rating (SEER) measures air conditioning and heat pump cooling efficiency. A SEER rating is a maximum efficiency rating, similar to the miles per gallon for a car.  Heating Seasonal Performance Factor (HSPF) is used to measure the efficiency of heat pumps and the higher the HSPF the more efficient the system.
Ducted or Mixed Ducted Mini-Split Heat Pump	<b>SEER</b> ≥15; <b>HSPF</b> ≥9	\$250 per ton	
Ductless Mini-Split Heat Pump	<b>SEER</b> ≥15; <b>HSPF</b> ≥10	\$150 per ton	
Heat Pump Water Heaters	ENERGY STAR ≤ 55 gallon; should have a minimum UEF of 2.00	\$300 rebate	Uniform Energy Factor (UEF) is a new metric for determining the energy efficiency of a water heater utilized by the Department of Energy. The higher the UEF, the greater the equipment's efficiency and the lower the energy bill.
	ENERGY STAR >55 gallon should have a minimum UEF of 2.70	\$150 rebate	Uniform Energy Factor (UEF) is a new metric for determining the energy efficiency of a water heater utilized by the Department of Energy. The higher the UEF, the greater the equipment's efficiency and the lower the energy bill.
Programmable Thermostats		\$25 Rebate	
*Rebate not to exceed \$1000 per customer for this program (excluding thermostats).			

Programmable Thermostats – programmable thermostats allow for better control of, and reduced operating costs from, heating and cooling systems. Therefore, programmable thermostats help manage a business's energy usage efficiently and conveniently. BIUD is proposing a \$25 rebate to customers who purchase a programmable thermostat.

Heat Pump Heating and Cooling, and Heat Pump Water Heaters: As in the residential program, it is proposed to incentivize business adoption of high-efficiency heat pump systems for heating and cooling, as well as heat pump water heaters. The recently proposed three-tier rate structure with an attractive winter electricity price, if approved by the Commission, is expected to make the adoption of electric heating measures even more cost effective for customers. By offering the

incentives proposed above, BIUD aims to encourage the installation of the most efficient electric heating or cooling systems.

Customers who install weatherization, additional lighting, or HVAC measures will be given their rebate after work has been completed and inspected. BIUD will offer rebate forms to customers both online and in person at the BIUD office and will require customers to provide proper documentation from the contractor who performed the job, in the form of a receipt or work order. Customers submitting rebates for eligible thermostats need only provide a purchase receipt as proper documentation with their rebate form. If a customer has any problems or questions regarding a rebate form, their contractor may be able to help complete relevant fields, and customers can always reach out to BIUD staff for assistance during business hours.

#### **4. Program Administration and Management**

The proposed management structure has been designed to ensure successful program delivery and implementation, effective customer outreach, timely customer service and rebate processing, and insightful data collection and reporting. Specifically, to achieve these outcomes, the District proposes a strong on-going collaboration with the Office of Energy Resources and proposes to hire an efficiency consultant to help administer the program and conduct program reporting.

##### **i. Vendor Engagement**

One of the critical elements to the success of the proposed DSM plan is the engagement of knowledgeable and reliable vendors. BIUD will be soliciting one vendor to provide energy assessments, direct install services and, if desired by the customer, weatherization measures to residential and business customers. The District will also be seeking a separate vendor to provide post-installation inspections for business customers and all residential non-direct install (e.g. weatherization and HVAC) measures. BIUD proposes issuing two competitive RFPs to hire a lead energy assessment vendor and a lead inspection services vendor, respectively.

The scope of work for these vendors will be designed to require comprehensive scheduling, high-quality in-person services, and coordination with BIUD staff. Selected vendors will be responsible for delivering efficient and effective services to customers, ensuring proper deployment and installation of incentivized energy efficiency measures, processing invoices and rebates in a timely fashion, and creating insightful program data reports.

##### **ii. Program Management and Oversight**

The District, recognizing the importance of robust oversight, data reporting, and program administration, will ensure staff will be trained and knowledgeable about the proposed program offerings and rebate process in order to effectively work with vendors, consultants, and customers in the delivery of the proposed DSM plan. BIUD also proposes several means of securing additional resources to support its management and oversight of the proposed plan. For example, the District plans to continue its ongoing engagement with the Office of Energy

Resources (OER) in order to leverage lessons learned and best practices from *Block Island Saves* and will also tap into the diverse set of efficiency expertise that OER can provide. Additionally, the efficiency consultant BIUD proposes hiring will help manage the program and its implementation, including the processing of rebates, the collection of data, and reporting on program performance.

Block Island Utility District will make rebate forms, including a listing of measure eligibility requirements, available both in person and online for customers to access. Once customers complete and submit rebate applications – either by mail or via email - the District’s rebate processing vendor will review them for accuracy and eligibility. All eligible applications received and reviewed will then be processed for payment to the customer, funds permitting, and customers should expect to receive their rebate in four to six weeks.

BIUD recognizes the importance of scheduling efficiency for the cost-efficiency of the proposed programs, since vendor travel to and from Block Island creates additional expenses compared to mainland efficiency programs. In order to minimize vendor trips to the Island, BIUD and its vendor will maximize the number of opportunities (assessments, weatherization, HVAC installations, etc.) completed in a day. The RFP the District will use to procure vendors will be explicit about the importance of scheduling efficiency and will ask respondents to explicitly address this important cost-barrier.

In the event that there is overcollection of ratepayer funds that are not spent on DSM programs in a given year, BIUD will roll those funds over into the next year. The subsequent DSM plan will indicate the exact budget category or categories those funds will be allocated to. Every effort will be made through careful planning, oversight, and budget tracking to ensure that there are not budget overages in a given year. In the event that a budget overage becomes a possibility within a given year, the District will close specific program(s) prior to an overage until the following year when funds become available again. As the District’s DSM plan evolves, participation rates will help inform budget setting for future years to ensure funds are allocated as accurately as possible to meet customer demand.

### iii. Customer Engagement

<b>Table 4.1 – Proposed Customer Outreach Channels and Budget Allocation</b>		
<u>Customer Outreach</u>		
<b>Total</b>	<b>\$5,250.00</b>	Outreach through Local Publications, Bill Inserts, Online, and Community Bulletin

While the *Block Island Saves* pilot program was very successful, it did conclude over two years prior to this proposed DSM plan. Therefore, BIUD will need to strategically engage customers in order to promote the return of efficiency programming to Block Island. In order to ensure customers are aware of the program and its offerings, as well as provide instructions on how to participate, BIUD will be promoting the DSM programs through the following channels:

1. Bill inserts will be included with customer bills at four different times during the year to advertise the DSM programs, provide information about how customers can participate, and highlight incentive opportunities.
2. BIUD will take out quarter page advertisements in the local publications for multiple weeks during both peak and off-peak seasons in order to reach as many customers as possible. These advertisements will provide information on the programs and have seasonal calls to action to encourage customer participation.
3. BIUD will also utilize several no-cost engagement channels, like the community bulletin and the District's Facebook page to spread the word about the DSM program to customers throughout the year.
4. Lastly, BIUD office staff will also be trained on the programs, available offerings, and ways customers can engage with energy efficiency in order to provide accurate information to customers coming into and/or calling the office with questions.
5. If other outreach opportunities arise, the District may pursue other channels of communication with customers if budget allows.

iv. Program Reporting

As was discussed in section 4.ii, *Program Management and Oversight*, BIUD proposes to hire an efficiency consultant to help oversee and manage the DSM programs. In addition to helping oversee the programs and assisting with the Plan's implementation, the efficiency consultant will assist the District with quarterly progress reports, which will help inform a mid-year and year-end report as well as provides guideposts for program performance throughout the year. The data that will be included in quarterly reports as well as the year-end report are as follows:

- Number of participants per sector (Residential vs. Business)
- Costs incurred to date and percent of budgeted spend (by budget category)
- Detailed accounting of what measures have been installed, both direct install and other measures incentivized by the DSM programs
- Number of rebates processed, by measure type
- Number of inspections completed out of number of inspections required, and associated costs.
- kWh and delivered fuel (oil, propane) savings, both annual and lifetime, resulting from the program
- Peak demand reduction resulting from the program
- Other data as required, or as deemed necessary by the District or the Commission

## 5. Conclusion

The Block Island Utility District believes that the proposed DSM plan describes and establishes an energy efficiency program that will provide considerable benefits to customers and the local grid throughout its implementation. There are significant energy savings opportunities in New

Shoreham, which will be clearly highlighted in a forthcoming market potential study being conducted for all of Rhode Island. While this market potential study is underway, this plan offers effective strategies to realize immediate energy savings on the Island. The plan provides opportunities for no-cost assessments and direct-install measures that all customers can access free of charge, as well as guidance and further incentives for deeper energy saving measures.

The proposed 2020 DSM plan iterates on the *Block Island Saves* pilot program to provide BIUD customers will access to a variety of energy saving measures. The Plan, if approved by the Commission, would provide heat pump incentives that are likely to help smooth New Shoreham's annual demand curve and enhance the benefits of BIUD's proposed new rate structure. Additionally, through weatherization, lighting controls, and programmable thermostat incentives, BIUD aims to drive additional customer investment in insulation and demand side management technologies.

In sum, this proposed DSM plan provides a strong foundation for efficiency programming on Block Island and is structured to deliver significant benefits to customers and the local grid.

Block Island Utility District respectfully requests that the Public Utilities Commission (PUC) approve this 2020 Demand Side Management plan, and its associated budgets, in their entirety. Specifically, the District requests that the PUC approve the following:

The proposed total budget amount and the budget categories contained therein.

The proposed program offerings.

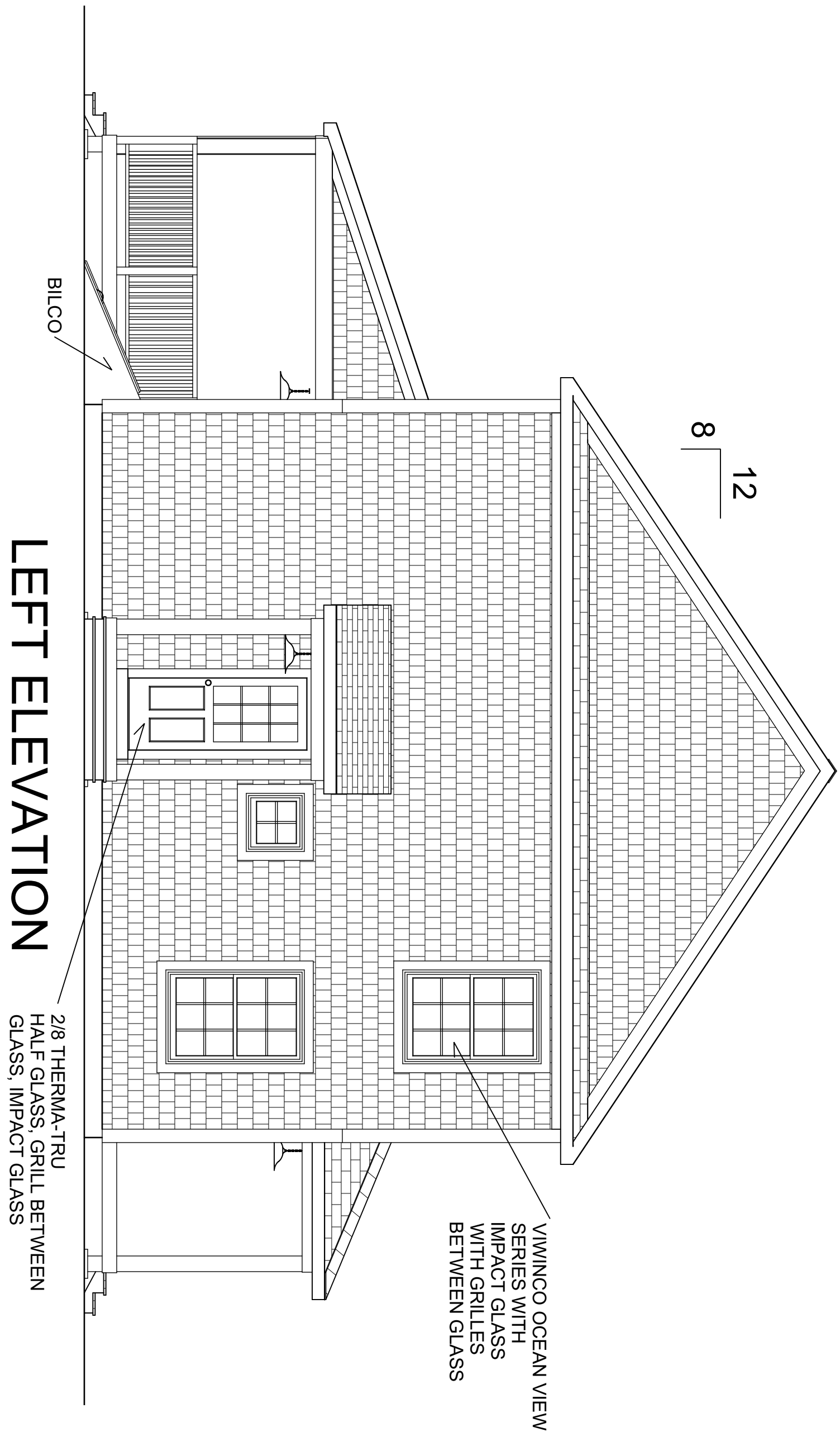
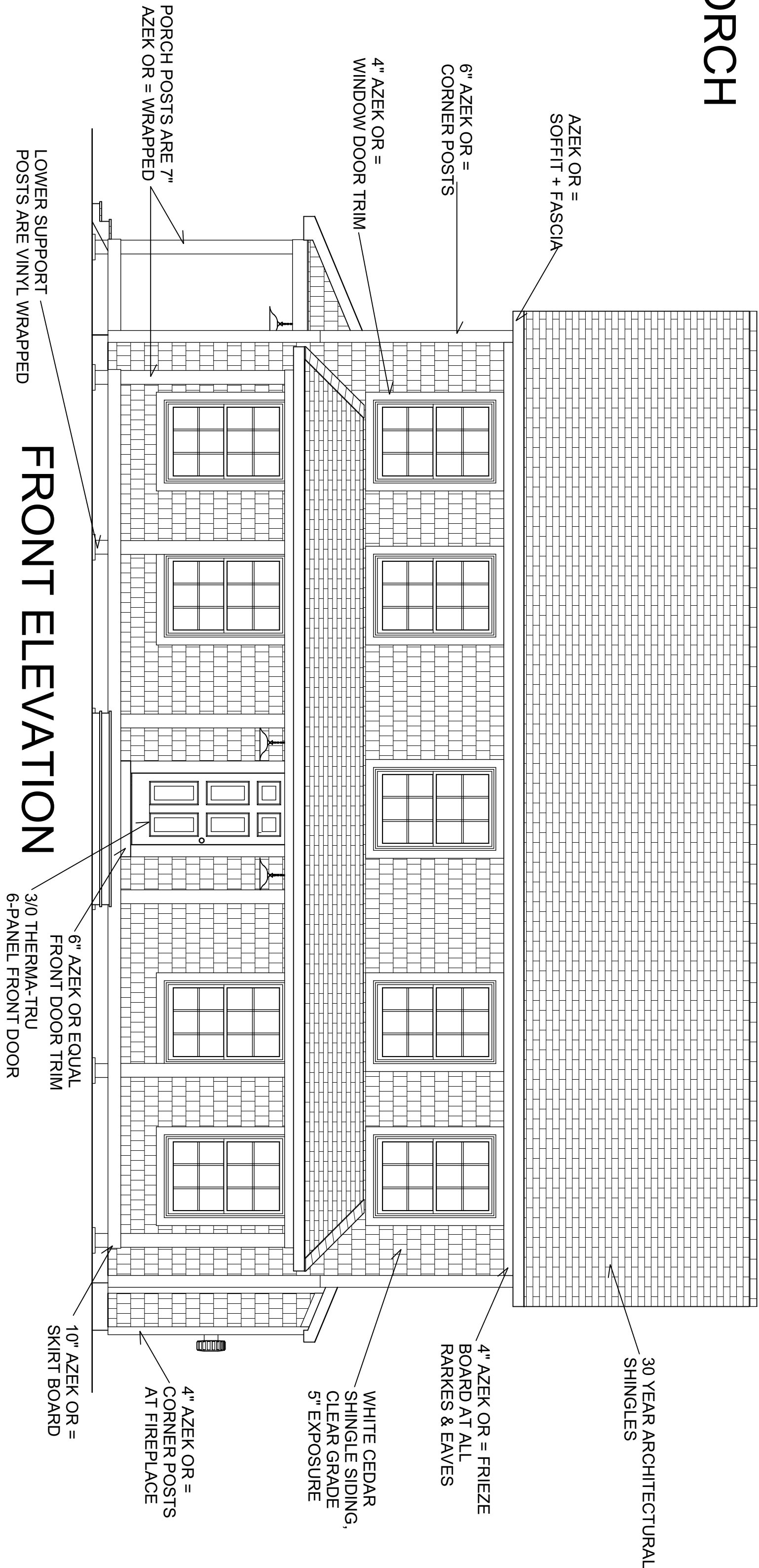
**AGENDA ITEM 8**  
**REVIEW AND ACT UPON FINAL HOUSE DRAWINGS**  
**FOR HDC SUBMITTAL**



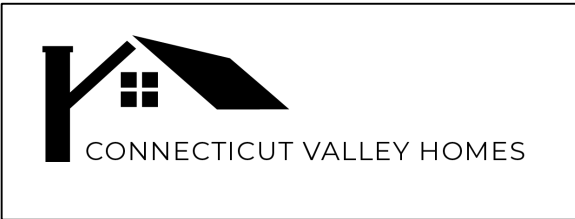




PLAN A:  
37' FRONT PORCH



NO.	DESCRIPTION	BY	DATE
06		SDD	05/27/20
07		SDD	08/01/20
08		SDD	08/03/20
04		SDD	05/11/20
05		SDD	05/18/20



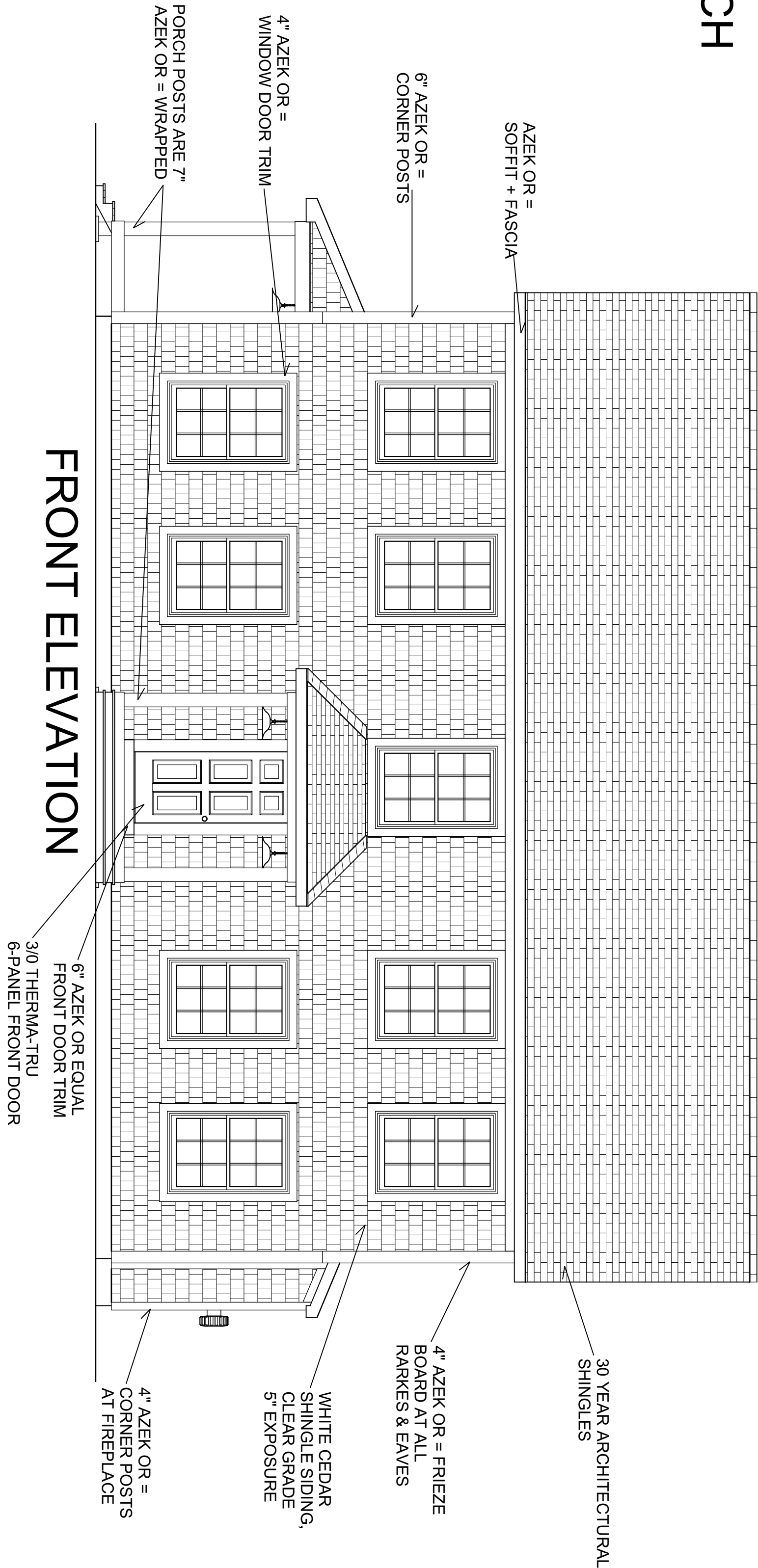
DRAWING #	200405
DRAWN BY:	SDD

27'-4" x 40'
BLOCK ISLAND UTILITY CORNER OF OCEAN RD & BEACH RD BLOCK ISLAND , RI
CUSTOMER:

DATE:	04/27/20
MODEL:	TWO STORY
SCALE:	1/4"=1'-0"
DRAWING:	FRONT/LEFT ELEVATIONS
SHEET:	1

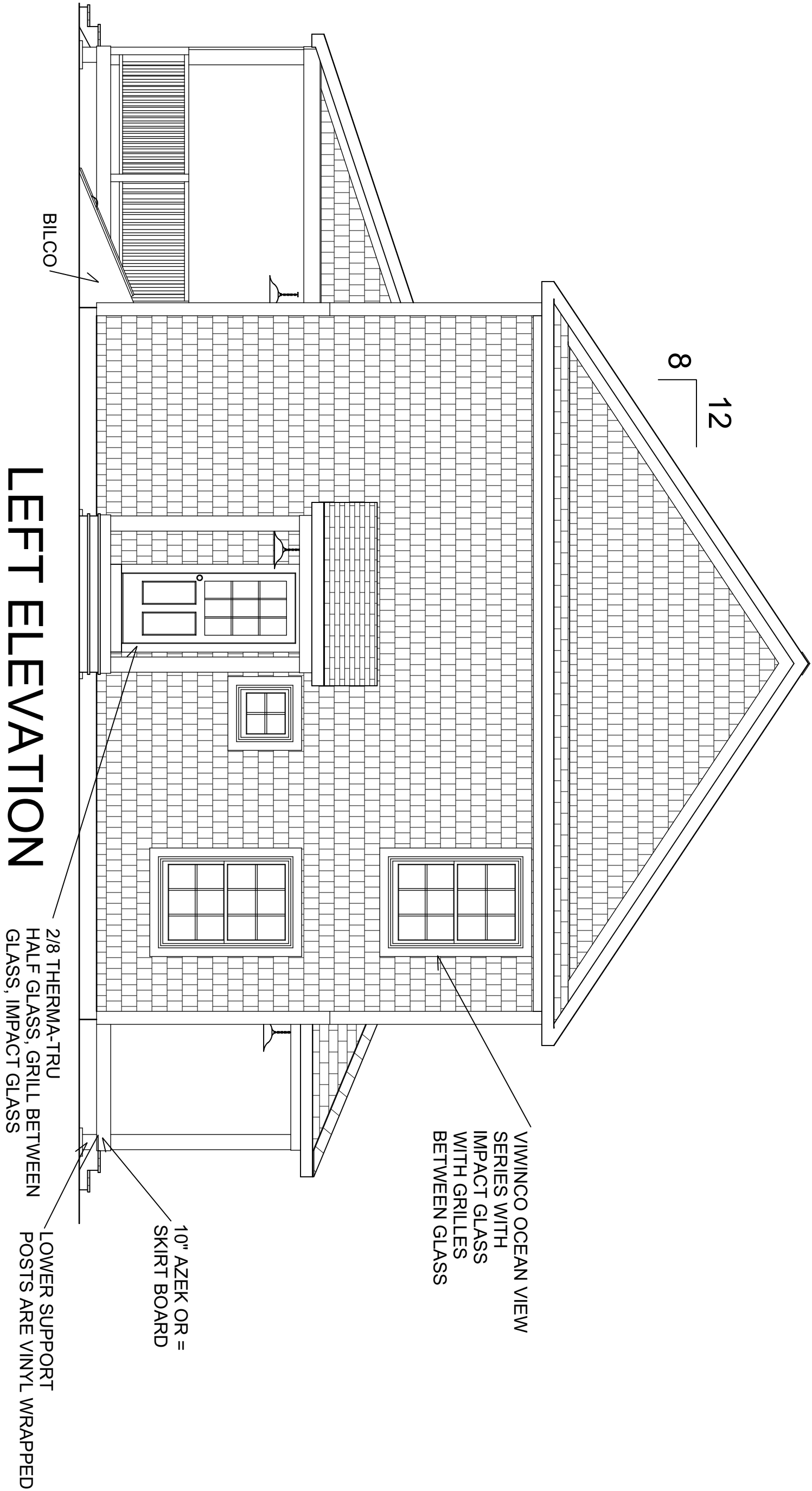


PLAN B:  
8' FRONT PORCH



FRONT ELEVATION

12  
8



LEFT ELEVATION

NO.	DESCRIPTION	BY	DATE
06		SDD	05/27/20
07		SDD	08/01/20
08		SDD	08/03/20
04		SDD	05/11/20
05		SDD	05/18/20



CONNECTICUT VALLEY HOMES

DRAWING #  
200405

DRAWN BY:  
SDD

27'-4" x 40'

BLOCK ISLAND UTILITY  
CORNER OF OCEAN RD & BEACH RD  
BLOCK ISLAND , RI

CUSTOMER:

DATE:

04/27/20

MODEL:

TWO STORY

SCALE:

1/4"=1'-0"

DRAWING:

FRONT/LEFT  
ELEVATIONS

SHEET:

2

WHITE VINYL  
PREMIER  
RAILING SYSTEM

LOWER SUPPORT  
POSTS ARE  
VINYL WRAPPED

## REAR ELEVATION

2/8 THERMA-TRU  
HALF GLASS,  
GRILLE BETWEEN  
GLASS, IMPACT GLASS

12  
8

## RIGHT ELEVATION

NO.	DESCRIPTION	BY	DATE
06		SDD	05/27/20
07		SDD	08/01/20
08		SDD	08/03/20
04		SDD	05/11/20
05		SDD	05/18/20



DRAWING #  
200405

DRAWN BY:  
SDD

27'-4" x 40'

**BLOCK ISLAND UTILITY**  
CORNER OF OCEAN RD & BEACH RD  
BLOCK ISLAND , RI

CUSTOMER :

DATE:  
04/27/20

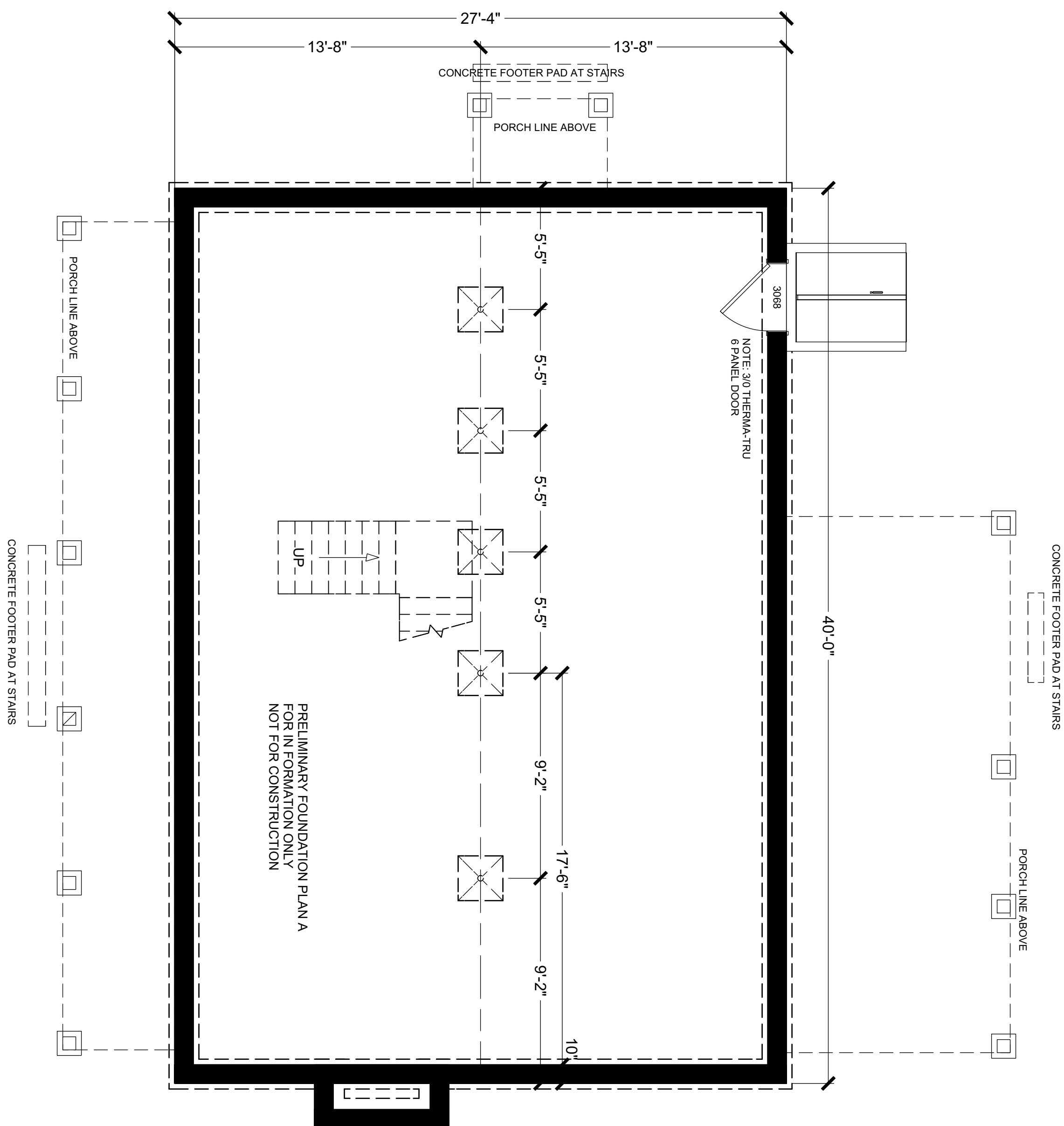
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TWO STORY

SCALE:  
1/4"=1'-0"

DRAWING:  
REAR/RIGHT  
ELEVATIONS

SHEET:  
3

# FOUNDATION PLAN A



NO.	DESCRIPTION	BY	DATE
06		SDD	05/27/20
07		SDD	08/01/20
08		SDD	08/03/20
04		SDD	05/11/20
05		SDD	05/18/20

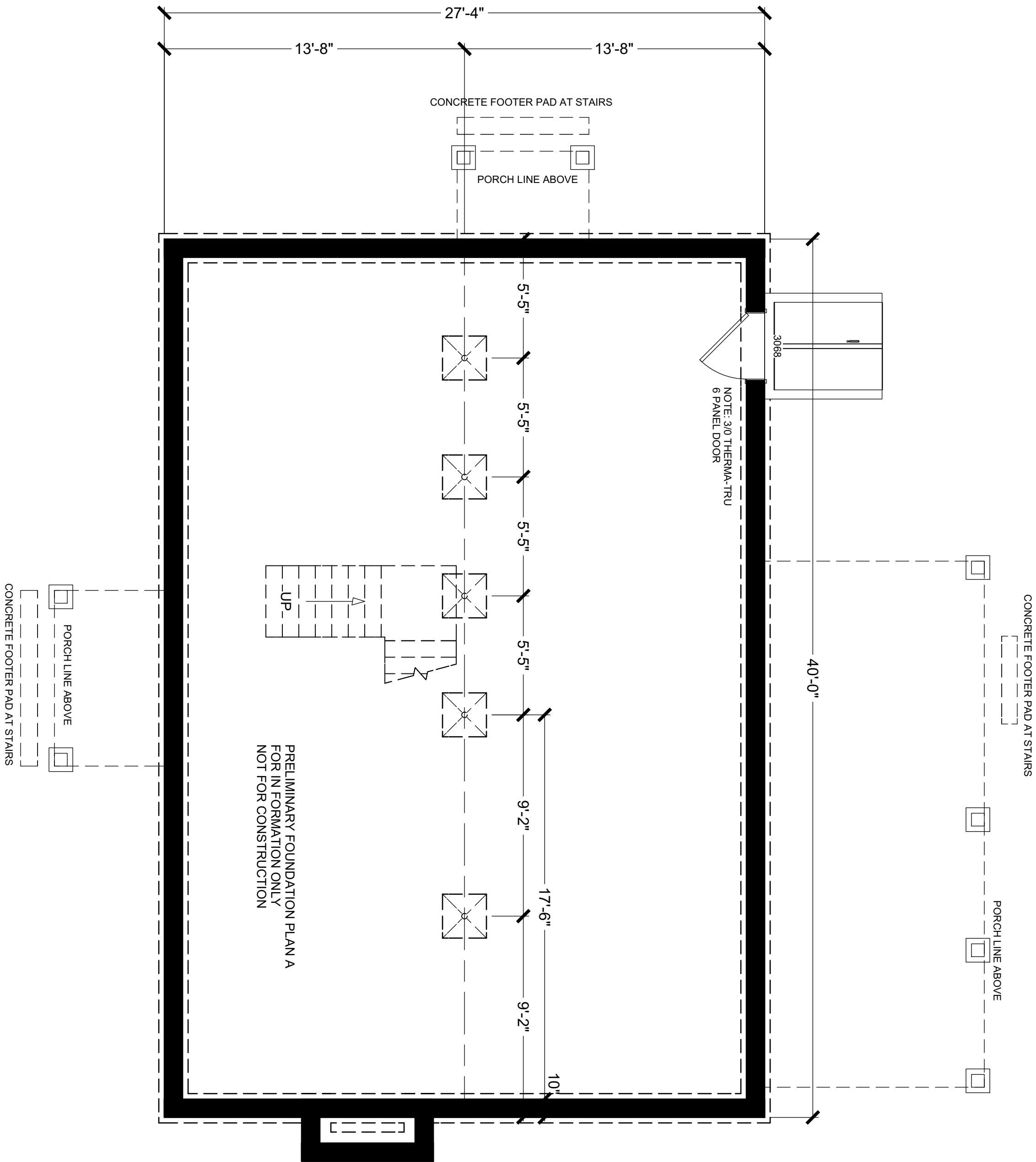


DRAWING #	200405
DRAWN BY:	SDD

CUSTOMER	27'-4" x 40'
	BLOCK ISLAND UTILITY CORNER OF OCEAN RD & BEACH RD BLOCK ISLAND , RI

DATE:
04/27/20
MODEL:
TWO STORY
SCALE:
1/4"=1'-0"
DRAWING:
FOUNDATION PLAN A
SHEET:

FOUNDATION PLAN B



NO.	DESCRIPTION	BY	DATE
06		SDD	05/27/20
07		SDD	08/01/20
08		SDD	08/03/20
04		SDD	05/11/20
05		SDD	05/18/20

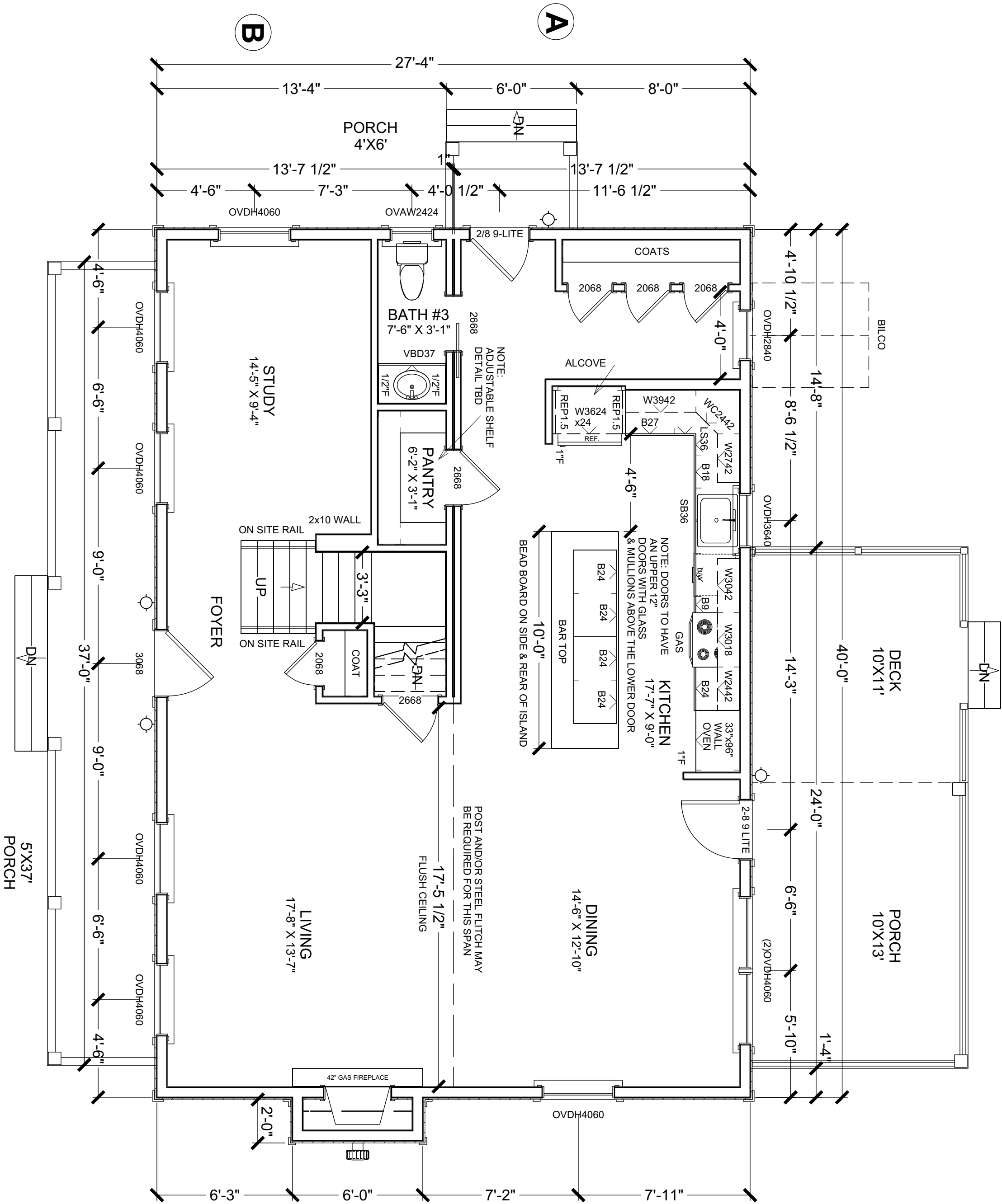


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27'-4" x 40'
BLOCK ISLAND UTILITY CORNER OF OCEAN RD & BEACH RD BLOCK ISLAND , RI
CUSTOMER :

DATE:	04/27/20
MODEL:	TWO STORY
SCALE:	1/4"=1'-0"
DRAWING:	FOUNDATION PLAN B
SHEET:	5

PLAN A:  
37' FRONT PORCH



GENERAL NOTES:  
8'-0" CEILING HEIGHT  
WINDOWS HEADER HEIGHT @ 6'-10 1/2" UNLESS NOTED OTHERWISE  
OCEAN VIEW IMPACT GLASS SERIES DBL HUNG WINDOWS  
VINYL PLANK FLOORS FOR ENTIRE HOUSE EXCEPT BATH 1+2 ARE TILE

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06		SDD	05/27/20
07		SDD	08/01/20
08		SDD	08/03/20
04		SDD	05/11/20
05		SDD	05/18/20



CONNECTICUT VALLEY HOMES

DRAWING #  
200405

DRAWN BY:  
SDD

27'-4" x 40'

BLOCK ISLAND UTILITY  
CORNER OF OCEAN RD & BEACH RD  
BLOCK ISLAND , RI

CUSTOMER:

DATE:

04/27/20

MODEL:

TWO STORY

SCALE:

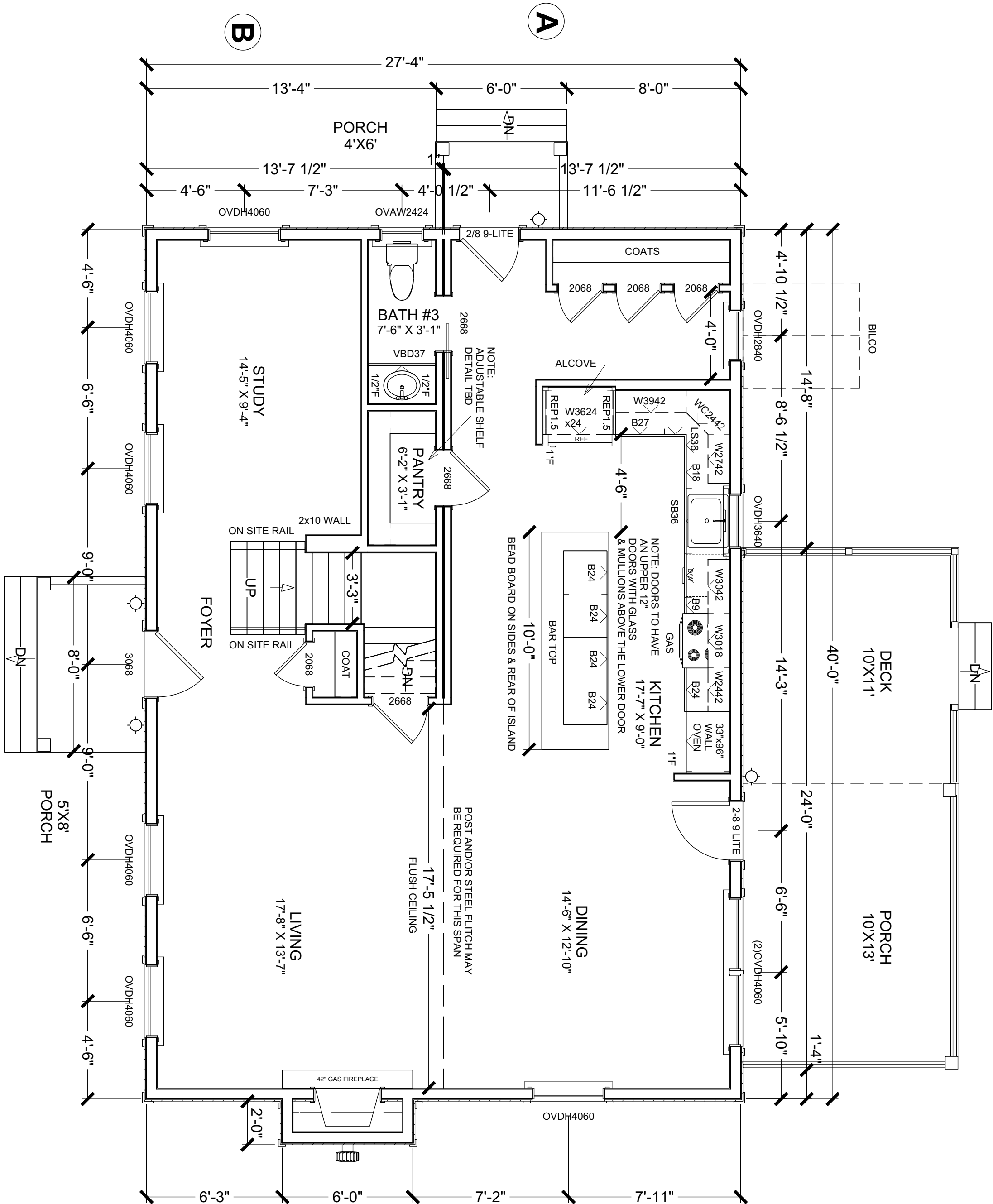
1/4"=1'-0"

DRAWING:

1ST FLOOR  
PLAN A

SHEET:

PLAN B:  
8' FRONT PORCH



GENERAL NOTES:  
8'-0" CEILING HEIGHT  
WINDOWS HEADER HEIGHT @ 6'-10 1/2" UNLESS NOTED OTHERWISE  
OCEAN VIEW IMPACT GLASS SERIES DBL HUNG WINDOWS  
VINYL PLANK FLOORS FOR ENTIRE HOUSE EXCEPT BATH 1+2 ARE TILE

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CONNECTICUT VALLEY HOMES

DRAWING #  
200405  
DRAWN BY:  
SDD

27'-4" x 40'

BLOCK ISLAND UTILITY  
CORNER OF OCEAN RD & BEACH RD  
BLOCK ISLAND , RI

CUSTOMER:

DATE:

04/27/20

MODEL:

TWO STORY

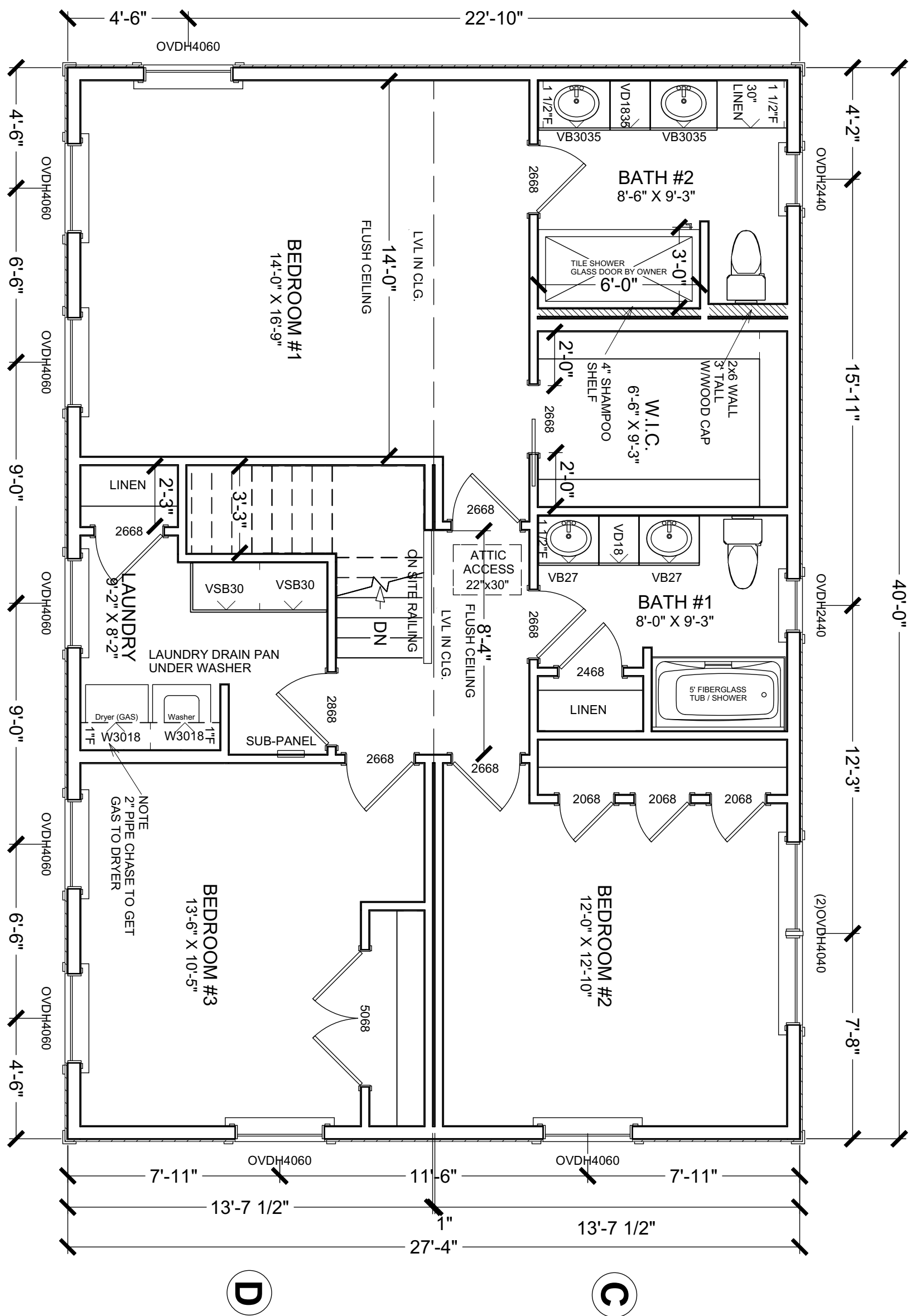
SCALE:

1/4"=1'-0"

DRAWING:

1ST FLOOR  
PLAN B

SHEET:



GENERAL NOTES:  
8'-0" CEILING HEIGHT  
WINDOWS HEADER HEIGHT @ 6'-10 1/2" UNLESS NOTED OTHERWISE  
OCEAN VIEW IMPACT GLASS SERIES DBL HUNG WINDOWS

## WINDOW SCHEDULE

MARK	QTY	R.O. SIZE		H.H.	DESCRIPTION	MATERIAL	COLOR		GLASS	GRIDS	U-F	SHGC
		WIDTH	HEIGHT				INTERIOR	EXTERIOR				
OVAW2424	1	2'-0"	2'-0"	6'-10 1/2"	AWNING	VINYL	WHITE	WHITE	CLEAR	YES	0.29	TBD
	IMPACT GLASS											
OVDH2440	2	2'-0"	3'-4"	6'-10 1/2"	DOUBLE HUNG	VINYL	WHITE	WHITE	CLEAR	YES	0.29	TBD
	IMPACT GLASS											
OVDH2840	1	2'-4"	3'-4"	6'-10 1/2"	DOUBLE HUNG	VINYL	WHITE	WHITE	CLEAR	YES	0.29	TBD
	IMPACT GLASS											
OVDH3640	1	3'-0"	3'-4"	6'-10 1/2"	DOUBLE HUNG	VINYL	WHITE	WHITE	CLEAR	YES	0.29	TBD
	IMPACT GLASS											
OVDH4060	14	3'-4"	5'-0"	6'-10 1/2"	DOUBLE HUNG	VINYL	WHITE	WHITE	CLEAR	YES	0.29	TBD
	IMPACT GLASS											
OVDH4060-2	2	6'-4"	3'-4"	6'-10 1/2"	DBL-DOUBLE HUNG	VINYL	WHITE	WHITE	CLEAR	YES	0.29	TBD
	IMPACT GLASS											

## DOOR SCHEDULE

MARK	QTY	NOMINAL SIZE		TYPE	U-F	SHGC	REMARKS
		WIDTH	HEIGHT				
3068	2	3'-2 1/2"	6'-10 1/2"	FRONT-EXTERIOR	0.14	TBD	THERMA-TRU S-210 6 PANEL
				BASEMENT AT BILCO			
2868	2	2'-10 1/2"	6'-10 1/2"	REAR/LEFT-EXTERIOR	0.28	TBD	THERMA-TRU S-262 GBGF
							

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DRAWN BY:	SDD

CUSTOMER	27'-4" x 40'
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27'-4" x 40'

DATE:

04/27/20

MODEL

## TWO STORY

SCALE:

1/4"=1'-0"

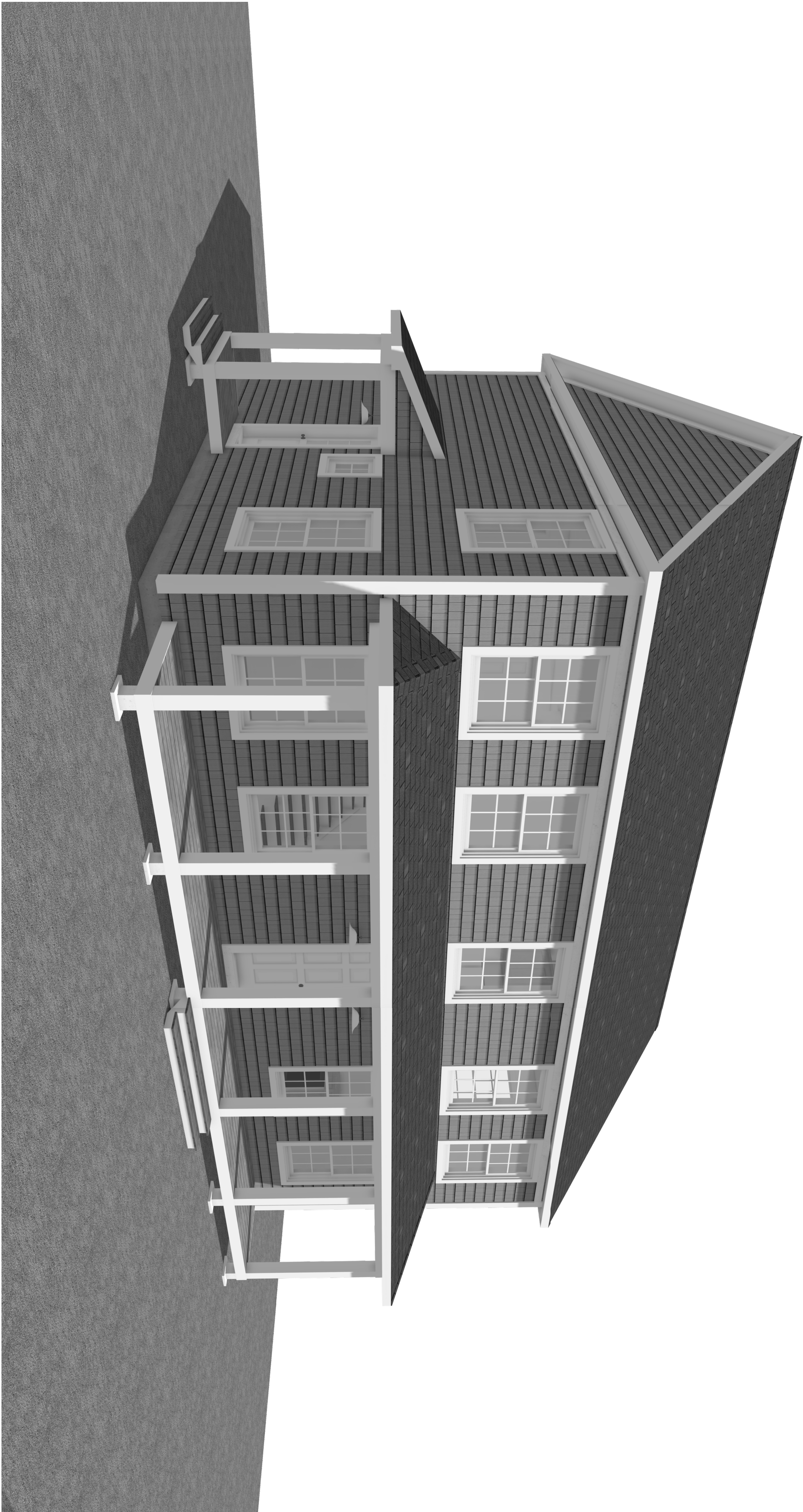
**DRAWING:**

**WINDOWS&DOORS  
SCHEDULE**

SHEET:



PLAN A:  
37' FRONT PORCH



NO.	DESCRIPTION	BY	DATE
06		SDD	05/27/20
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DRAWING #  
200405

DRAWN BY:  
SDD

27'-4" x 40'

BLOCK ISLAND UTILITY  
CORNER OF OCEAN RD & BEACH RD  
BLOCK ISLAND , RI

CUSTOMER :

DATE:  
04/27/20

MODEL:  
TWO STORY

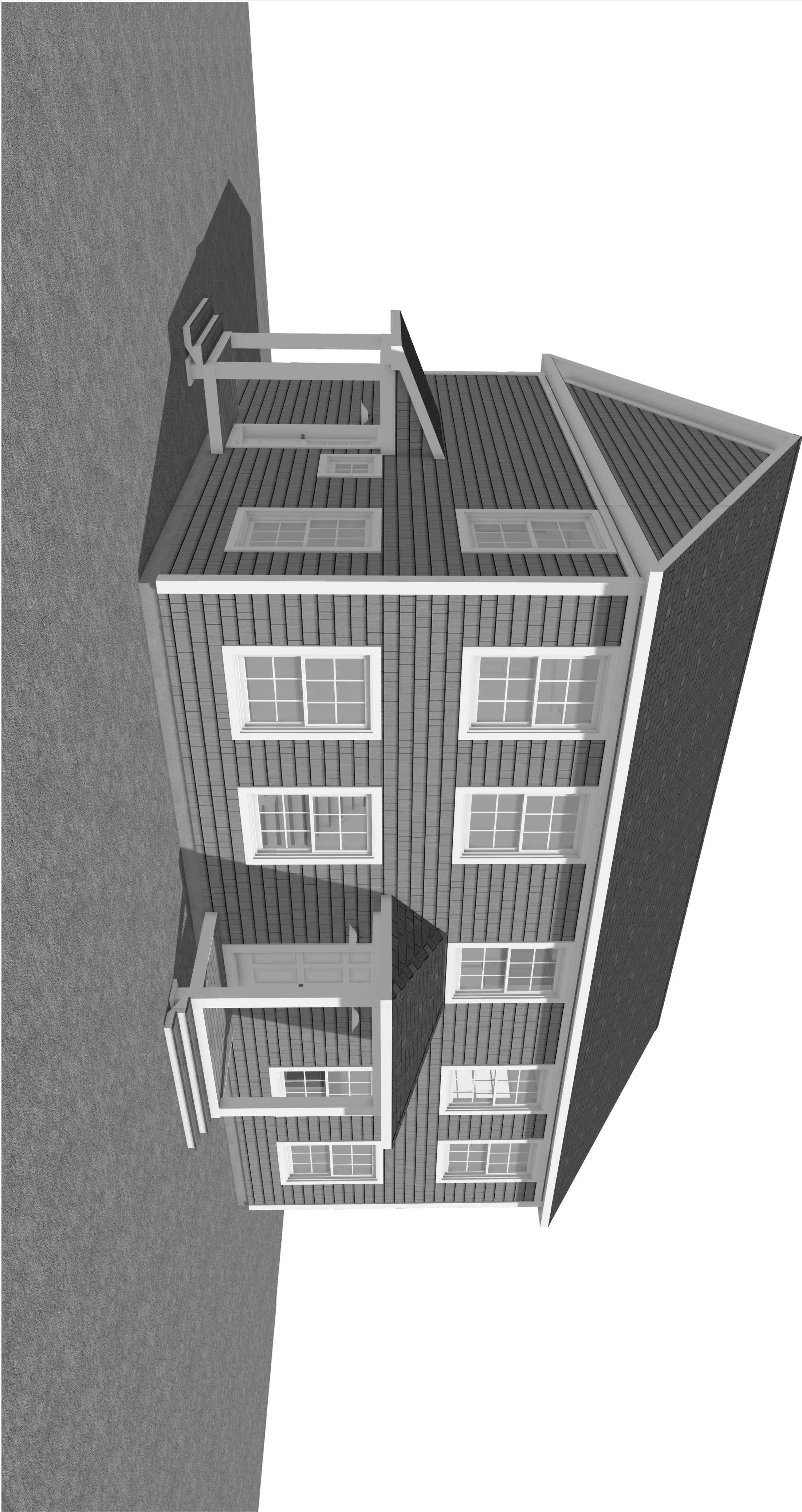
SCALE:  
1/4"=1'-0"

DRAWING:  
3D  
RENDERING

SHEET:  
10



PLAN A:  
8' FRONT PORCH



NO.	DESCRIPTION	BY	DATE
06		SDD	05/27/20
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DRAWN BY:	SDD

27'-4" x 40'
BLOCK ISLAND UTILITY CORNER OF OCEAN RD & BEACH RD BLOCK ISLAND , RI
CUSTOMER :

DATE:	04/27/20
MODEL:	TWO STORY
SCALE:	1/4"=1'-0"
DRAWING:	3D RENDERING
SHEET:	11