

Executive Director's Summary Report

to the Board of Trustees
of the
Efficiency Maine Trust

October 7, 2020

1. Public Information and Outreach

A) Awareness and Press

- Press
 - The Executive Director is quoted on the importance of reaching Maine's carbon emissions goals in an article in the Fall 2020 edition of Green & Healthy Maine HOMES that focuses on the potential to establish a green bank in the state (<https://greenmainehomes.com/blog/funding-clean-energy-with-a-green-bank>).
 - The Executive Director is quoted in a September 13 article in The Maine Monitor about the prospect of a Maine Green Bank (<https://www.themainemonitor.org/green-bank-could-help-maine-turn-tide-on-fossil-fuel-dependency/>).
 - The Bangor Daily News ran an article on September 3 about electric vehicle chargers being installed in Aroostook County. Efficiency Maine's Electric Vehicle program was mentioned and a link was provided to our website (<https://bangordailynews.com/2020/09/03/news/aroostook/electric-vehicle-charging-stations-increase-in-a-county-that-barely-uses-them/>).
 - The Portland Press Herald and Centralmaine.com covered Efficiency Maine's Parking and Pole Lighting Retrofit Initiative:
 - Portland Press Herald, September 10 - <https://www.pressherald.com/2020/09/10/efficiency-maine-parking-and-pole-lighting-initiative-helps-save-energy-at-over-30-outdoor-locations/>
 - Centralmaine.com, September 5 - <https://www.centralmaine.com/2020/09/05/central-maine-business-briefs-attorney-matthew-morgan-named-partner-of-mckee-law-firm/>
 - Village Soup ran a brief article on August 31 about the installation of two electric vehicle chargers in Rockland that mentions the municipality's use of an Efficiency Maine grant (<https://knox.villagesoup.com/p/rockland-installs-electric-charging-station/1867851>).
 - Mainebiz extensively quoted the Executive Director in an August 26 article highlighting the recommendations of the Maine Climate Council's Buildings, Infrastructure and Housing Working Group. The presentation was delivered during a webinar hosted by Greater Portland Landmarks (<https://www.mainebiz.biz/article/maine-climate-council-stringent-building-codes-key-to-reducing-greenhouse-gases>).
 - The Executive Director is featured among other presenters in an article posted on August 13 to the NRDC website highlighting a series of webinars it hosted on building electrification (<https://www.nrdc.org/experts/alejandra-mejia/how-design-building-electrification-programs-work>).
 - The Ellsworth American mentioned the Efficiency Maine grant being used to defray the cost of an EV Charger at the new Acadia Gateway Center in an August 13 article

about that Maine Department of Transportation (MDOT) project (<https://www.ellsworthamerican.com/maine-news/grant-to-fund-second-phase-of-acadia-gateway-center/>).

- Seacoast Online mentioned Efficiency Maine as a good resource to find out more about heat pumps in an August 12 article about using heat pumps for heating and air conditioning (<https://www.seacoastonline.com/opinion/20200812/getting-ready-beat-heat-with-heat-pump>).
- Green and Healthy Maine Homes featured Efficiency Maine in an August 12 article on Financing Energy Upgrades. The article links to the home energy calculator, weatherization solutions, vendor locator and home energy loans web pages (<https://greenmainehomes.com/blog/2020/8/10/financing-energy-upgrades>).
- Several outlets covered Efficiency Maine's School Lighting Retrofit initiative:
 - An article in Smart Energy Decisions on August 11 based on one that appeared in Energy News Network (<https://www.smartenergydecisions.com/energy-management/2020/08/11/maine-public-schools-implement-led-incentive-program>).
 - An August 10 Energy News Network article that featured an interview with the Executive Director and included quotes from three different school representatives. (<https://energynews.us/2020/08/10/northeast/maine-schools-take-advantage-of-empty-halls-to-make-efficiency-upgrades/>).
 - An August 10 article in Energy Central, a membership-based Professional Network serving the global electric power industry (<https://energycentral.com/c/pip/maine-schools-take-advantage-empty-halls-make-efficiency-upgrades>).
 - Articles in Maine DOE Newsroom and an independent Newsfeed called Serendeputy. (<https://mainedoenews.net/2020/07/22/efficiency-maine-helps-brighten-more-than-50-maine-public-schools-with-incentives-to-support-lighting-upgrades/>; <https://serendeputy.com/d/a8e03b3117>).
 - Radio interview and article with the Executive Director was featured in an online article (106.5 website, August 3) and in a radio interview that aired August 2 on Q106.5-WQCB, I95-WWMJ, 1370 WDEA-AM, Z107.3-WBZN, and 92.9 The Ticket-WEZQ (<https://q1065.fm/the-one-website-you-need-to-save-money-on-household-expenses/>).
- An August 7 Portland Press Herald article about the purchase of a Tesla by the Kennebunk Fire Department mentioned that the purchase of the vehicle used Efficiency Maine Electric Vehicle rebates and the installation of local Level 2 chargers were funded by Efficiency Maine grants (<https://www.pressherald.com/2020/08/07/a-new-kind-of-command-car-at-kennebunk-fire-department/>).
- Efficiency Maine's insulation and heat pump programs are cited as a resource for energy-saving solutions for low-income households in an August 3 blog post in the Penobscot Bay Pilot that discusses climate change, reducing carbon emissions and adopting fossil-fuel-free electric solutions (<https://www.penbaypilot.com/blog-entry/quick-act-climate-crisis-now/137012>).
- On July 28, The Free Press Online covered Efficiency Maine's June 30 press release announcing the installation of Level 2 Chargers in Thomaston (<https://freepressonline.com/Content/Default/Features/Article/Thomaston-Installs-Two-EV-Charging-Stations/-3/734/70020>).

- Efficiency Maine’s heat pump and heat pump water heater programs were cited by Dan Burgess, director of the Governor’s Energy Office, in a July 21 article in RTO Insider as examples of initiatives that provide environmental benefits and jobs to the state. The article was a recap of speakers’ remarks during a webinar hosted by the Environmental Business Council of New England (<https://rtoinsider.com/new-england-states-clean-energy-168564/>).
- Events
 - Staff supported a webinar titled “Zoom In: The Basics of Driving Electric in Maine” hosted by the Natural Resources Council of Maine on September 30.
 - Staff supported Efficiency Maine’s virtual presence at the Common Ground Fair on September 25-27.
 - Staff presented a portion of heat pump training to the Maine Energy Marketers Association on September 22.
 - Staff participated in a webinar titled “Be Comfortable, Save Money-Energy Efficiency and You” conducted on September 10 by GrowSmart Maine.
 - Staff presented an overview of Efficiency Maine programs to the Kennebec Valley Board of Realtors Young Professionals group on September 1.
 - Staff participated in an "Ask a Maine EV Driver" webinar/virtual event on August 6 hosted by the Natural Resources Council of Maine.
 - On July 24, the Executive Director presented on “Maine’s Heat Pump Programs: Taking Electrification to Scale” during a national webinar sponsored by National Resources Defense Council.
- Website and Outreach
 - 33,723 website visits
 - 21,827 unique visits
 - 6,264 visits website driven through digital ads
 - Facebook
 - 3,658 fans
 - Quarter 1 spending on digital ads: approximately \$52,000 (27%), including \$48,844 on Google ads and \$2,854 on Facebook ads. Staff do not propose any adjustments to the digital ad budget at this time.
- Call Center (August)
 - 1,901 inbound phone calls received; volume is up 50% from August 2019
 - 97% answered within 20 seconds (vs. a goal of 90%)
 - 897 inbound emails
 - 1,137 pieces of inbound mail; up 45% from August 2019

B) Government Relations

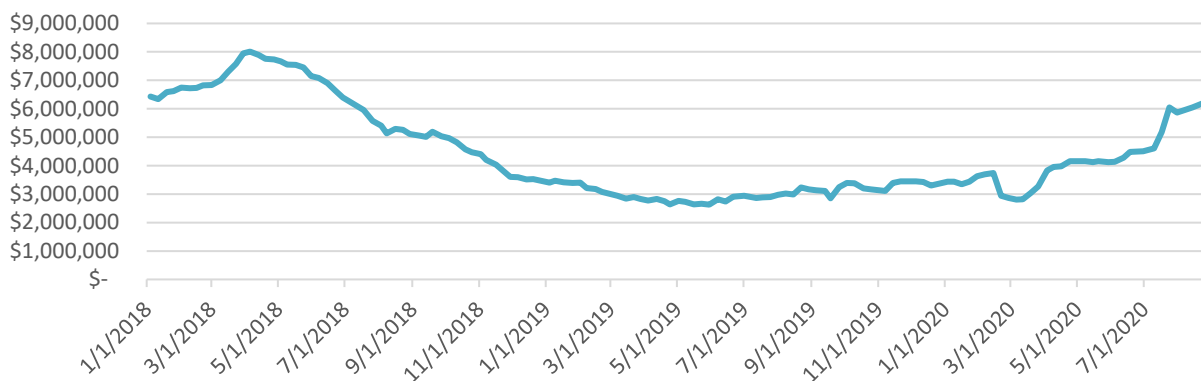
- Maine Public Utilities Commission (PUC)
 - The Trust continued its work with the Office of the Public Advocate (OPA) on various Non-Wires Alternatives Coordinator tasks including;
 - Reviewing of Section 80 updated filed at the PUC
 - Working with the NWAC to develop and share a process flowchart to share with stakeholders at a meeting on October 7.
 - The Trust filed a report on the baseline efficiency for natural gas boilers.
- Maine Climate Council (MCC)
 - Two meetings of the MCC were held to review and discuss recommendations made by the Working Groups
 - Additional briefings were held by the modelers to relay emissions reductions and cost-benefit analysis of the various recommendations under consideration.

2. Program Highlights¹

A) C&I Prescriptive (CIP) Program

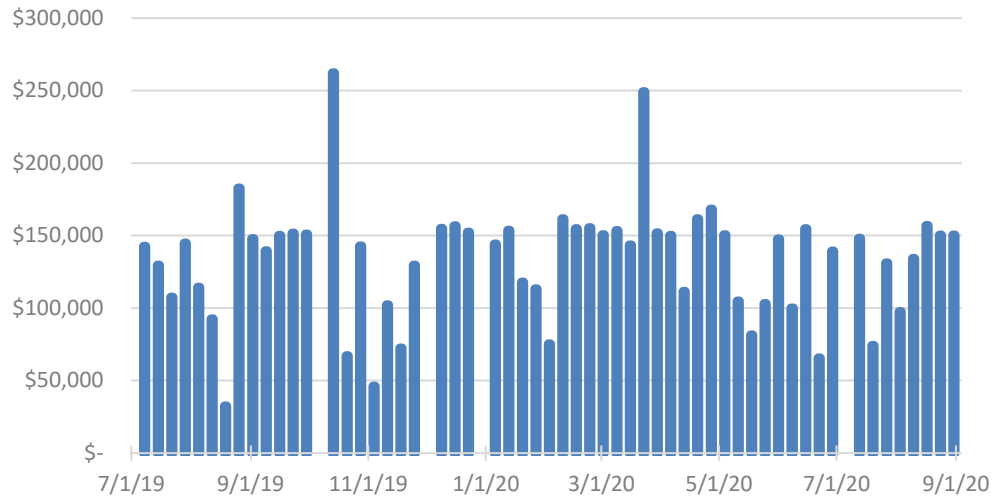
- The current pipeline of pending projects represents over \$6.0 million in new commitments, approximately \$400,000 increase over last month. Targeted initiatives under Funding Opportunity Notices (FONs) as well as variable refrigerant flow (VRF) systems are driving this trend.
- FON updates:
 - Projects under the School Lighting Retrofit FON had to be completed by August 31. Thus far, incentives for 15 projects (\$176,000) have been paid; 17 projects (\$389,000) have been completed and are awaiting physical inspection and final review; and 15 projects (\$129,000) are awaiting final paperwork.
 - The Parking and Pole Lighting Retrofits FON accepted applications through September 30. Projects must be installed by October 31. To date, the program has preapproved (and customers have acknowledged) projects with incentives worth approximately \$330,000. Of these, 9 projects (\$75,000) have been paid; 5 projects (\$24,000) have been completed and are awaiting physical inspection and final review; and 25 projects (\$230,000) are awaiting final paperwork.
 - The Packaged Terminal Heat Pump (PTHP) Retrofits FON is accepting applications through September 30. Projects must be installed by October 31. To date, the program has preapproved (and customers have acknowledged) projects with incentives worth approximately \$263,000. Of these, 1 project for \$37,000 has been completed and is awaiting physical inspection and final review.
- 620 individuals (in 505 firms) have completed FY2021 Qualified Partner (QP) Certification.
- The program prepared for restarting onsite visits for physical inspections of completed projects and project assistance in early September. Safety protocols have been implemented and will be shared with customers and contractors in advance of each visit. A log of every site visit will be kept for contact tracing if necessary.

CIP - Pipeline



¹ The Updated Financials table reported for each Program reflects data pulled from the Trust's financial management system mid-month; the Energy Savings table reflects data pulled from the Efficiency Maine project tracking database on October 2, 2020, to capture the progress for the year through the most recent complete month of reported actual results (i.e., through the end of August 2020).

CIP - Incentives Paid



Updated Financials	Program Investment
FY2021 Program Budget	\$13,976,000
7/1 to 8/31 Spending	\$1,004,227
Percent of Budget Spent to Date	7%
Percent of Year Passed	17%

Additional Details on FY2021 Financials	Program Investment
Expenditures	\$1,004,227
Committed Pipeline	\$5,969,261
Total (Expenditures and Committed Pipeline)	\$6,973,488
Percent of Current Budget	50%

Note: The current budget does not yet reflect the addition of FY2020 carryforward funds for committed projects.

Energy Savings (through 8/31)	Annual kWh Savings	Annual MMBtu Savings*
Electric Programs	4,557,185	(1,788)
Thermal Programs	-	579

*Negative MMBtu savings indicates thermal interactive effects with lighting measures.

Project Type (through 8/31)	Projects
Prescriptive Lighting Solutions	177
Electric Heating and Cooling Solutions	75
Compressed Air Solutions and Other	14
Natural Gas Heating and Cooling Solutions	2
All Fuels Heating and Cooling Solutions	-

B) C&I Custom Program

- The C&I Custom Program Review Team met twice and approved 5 projects worth \$863,955 in incentive offers.
- The pipeline has grown modestly, adding 1 new project. The total pipeline now consists of 2 projects worth almost \$515,000 in incentive offers, after adjusting for probability of completion.
- Program staff received 2 new scoping audit requests and 1 new technical assistance (TA) study request.
- Program staff reviewed 2 project proposals that did not meet the program requirements and were ultimately denied.

Updated Financials	Program Investment
FY2021 Program Budget	\$5,936,000
7/1 to 8/31 Spending	\$148,319
Percent of Budget Spent to Date	2%
Percent of Year Passed	17%

Additional Details on FY2021 Financials	Program Investment
Expenditures	\$148,319
Committed	\$6,288,954
Pipeline	\$514,096
Total (Expenditures, Committed, & Pipeline)	\$6,951,370
Percent of Current Budget	134%

Note: The current budget does not yet reflect the addition of FY2020 carryforward funds for committed projects.

Energy Savings (through 8/31)	Annual kWh Savings	Annual MMBtu Savings
Electric Programs	584,808	-
Thermal Programs	-	-

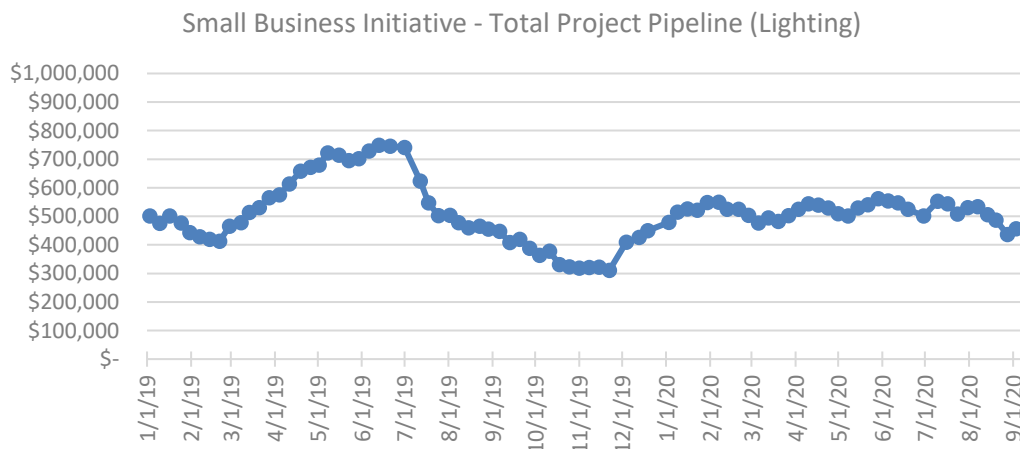
C) Small Business Initiative (SBI)

- Overall program activity remained steady through the summer. Following are highlights for active regions:
 - Region 15 (Augusta) is no longer accepting new customers (as of March 31, 2020). A total of 10 participating contractors are involved in this region. There are 12 open projects remaining, some of which are being delayed due to COVID-19.
 - Region 16 (Calais to Lubec) is underway. Nine contractors are on board for the region. Some work has been delayed, but a couple contractors have remained busy working on their queue, completing assessments and installations where possible.
 - Region 17 (Dover-Foxcroft area) is active. A total of 12 contractors are participating in this region. Some projects have remained on hold due to COVID-19.

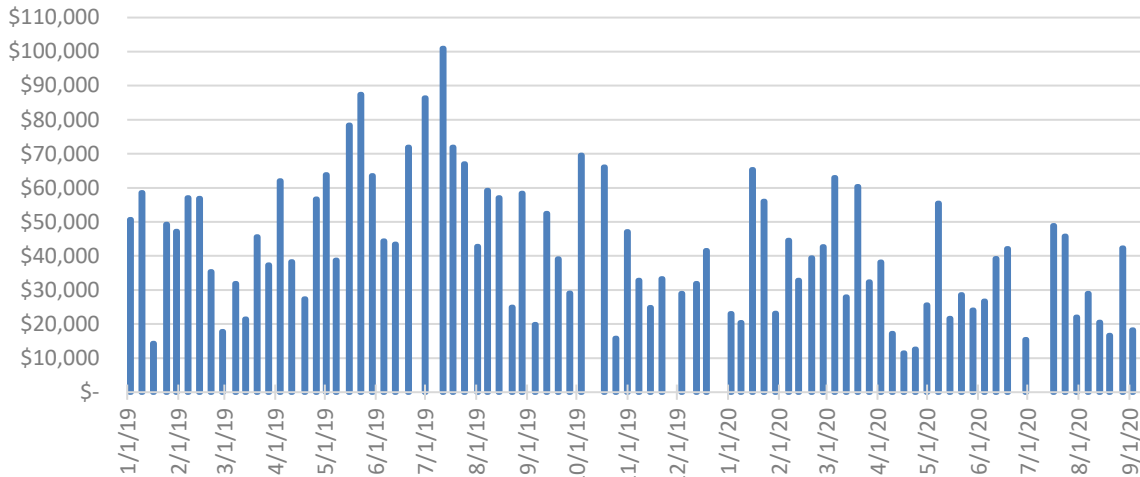
- Region 18 (Millinocket area) was rolled out in March. A total of 18 contractors have signed on to participate. The pipeline for this region remained fairly steady this month.
- Region 19 (Brewer) was launched in May to allow businesses to participate if they interested and able to do so safely. A total of 19 contractors have signed on to participate, and the pipeline continued to grow this month.
- Regions 20 (Bucksport Area), 21 (Belfast Area), and 22 (Belgrade Lakes Area) were launched in August. Introductory mailers have been sent to eligible businesses in Regions 20 and 21. The introductory mailer for Region 22 was scheduled to be sent early September. The program team has been recruiting contractors and held three contractor informational webinars in August. A third webinar was scheduled for September 8.
- Enhanced incentives will be offered for heat pump retrofits to eligible small business customers in new, active SBI regions starting in FY2021, starting with Regions 20, 21, and 22. In addition, financing will be available for small business customers that move forward with a heat pump project in these new, active SBI regions (lighting project costs may be rolled in as well).
- The program team is reviewing utility data for additional possible regions.

SBI Activities	Region 15	Region 16	Region 17	Region 18	Region 19	Region 20
Launch Date	9/2019	10/2019	1/2020	2/2020	5/2020	8/2020
# of Participating Contractors*	10	9	12	17	19	16
Assessments Requested/Assigned	156	159	122	74	45	7
Assessments Completed	140	145	98	69	39	5
Pre-approved Projects	126	141	83	59	35	1
Signed SOWs	106	126	72	38	27	0
Installations Underway	1	9	11	3	7	0
Projects Completed	103	100	55	27	15	0

Region 15 covers the Augusta area; **Region 16** covers Calais and eastern Washington County; **Region 17** covers the Dover-Foxcroft area; **Region 18** covers the Millinocket area; **Region 19** covers Brewer; and **Region 20** covers the Bucksport area.



SBI - Total Incentives Paid & Total Project Pipeline (Lighting)



Updated Financials	Program Investment
FY2021 Program Budget	\$5,162,000
7/1 to 8/31 Spending	\$268,622
Percent of Budget Spent to Date	5%
Percent of Year Passed	17%

Additional Details on FY2021 Financials	Program Investment
Expenditures	\$286,622
Committed Pipeline	\$456,280
Total (Expenditures & Committed Pipeline)	\$724,902
Percent of Current Budget	14%

Note: The current budget does not yet reflect the addition of FY2020 carryforward funds for committed projects.

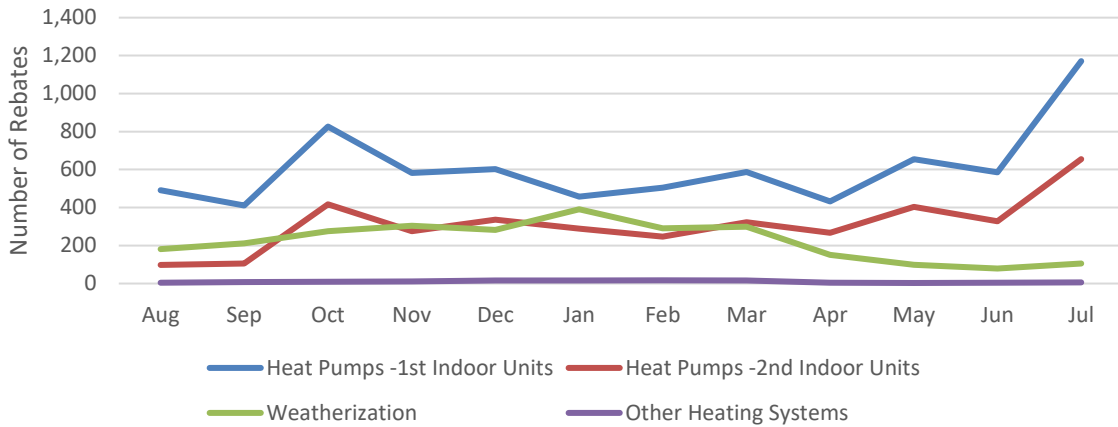
Energy Savings (through 8/31)	Annual kWh Savings	Annual MMBtu Savings*
Electric Programs	563,657	(511)

*Negative MMBtu savings indicates thermal interactive effects with lighting measures.

D) Home Energy Savings Program (HESP)

- Year-to-date (through the end of August):
 - The number of heat pump rebates completed was 4,248, up 101% from FY2020;
 - The number of weatherization rebates completed was 304, down 37% from FY2020.
- Rebate claims for heat pumps are being submitted at unprecedented rates. Delivery team staff is being hired/contracted and processes are being streamlined to handle the volume, but a processing backlog is growing.
- A new Professional Training webpage has been launched along with a process for training organizations to become Efficiency Maine Registered Trainers. Four training companies have registered and there are now five heat pump installation classes listed. Efficiency Maine’s Annual Heat Pump Basics free 1-hour video is also linked to this page.

HESP Number of Rebates - Last 12 Months



Updated Financials	Program Investment
FY2021 Program Budget	\$13,065,000
7/1 to 8/31 Spending	\$2,040,455
Percent of Budget Spent to Date	16%
Percent of Year Passed	17%

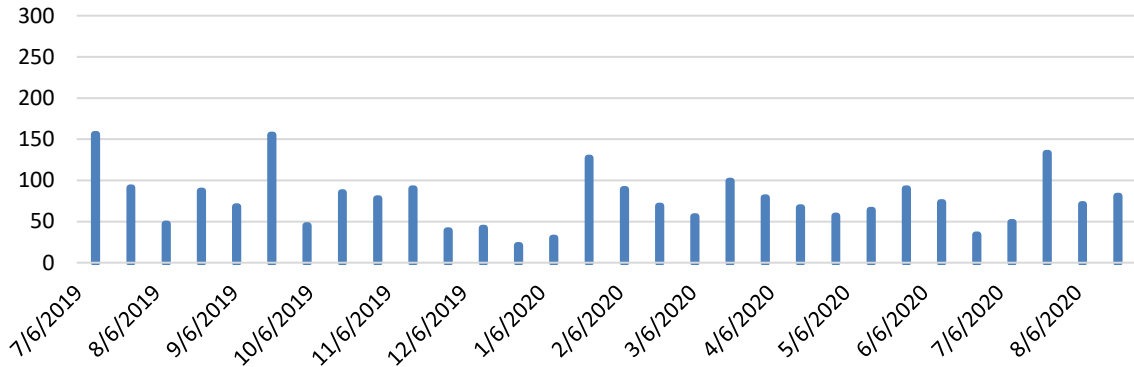
Energy Savings (through 8/31)	Annual kWh Savings	Annual MMBtu Savings
Electric Programs	-	30,382
Thermal Programs	74,499	3,188

Project Type (through 8/31)	Participating Households
Electric Measures	1,863
All Fuels Measures	141
Natural Gas Measures	-

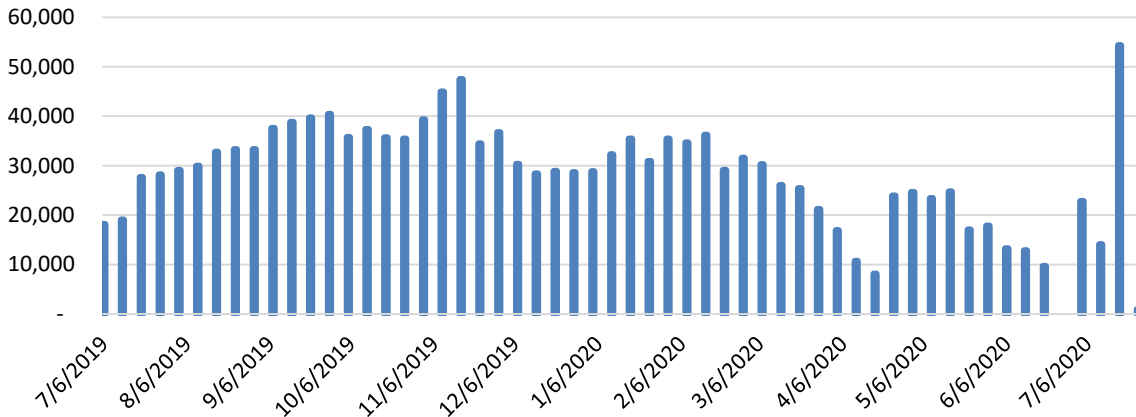
E) Retail Initiatives Program

- LED bulb volumes are on track to reach hit a 4-year high in FY2021.
- A Home Depot \$850 instant rebate coupon for heat pump water heaters (HPWHs) that launched in July has driven such demand that all 11 Home Depots are out of stock despite some now getting factory-direct shipments. Overcoming the “first-cost barrier” is proving successful.
- An inadvertent HPWH price increase at Lowe’s was corrected within two days, once the program team notified Lowe’s headquarters.
- Maine leads the U.S. in heat pump water heater installs. The ENERGY STAR® 2019 Unit Shipment Report shows 84,000 HPWHs shipped in the U.S. in 2019; last year Efficiency Maine rebated 8,466 units, which is one out of every 10 heat pump water heaters in the country.

Bi-Weekly Retail HPWH Sales (invoiced)



Weekly Bulb Sales – Retail (invoiced)



Updated Financials	Program Investment
FY2021 Program Budget	\$6,614,000
7/1 to 8/31 Spending	\$889,214
Percent of Budget Spent to Date	13%
Percent of Year Passed	17%

Energy Savings (through 8/31)	Annual kWh Savings	Annual MMBtu Savings*
Electric Programs	3,326,764	(847)
Thermal Programs	-	-

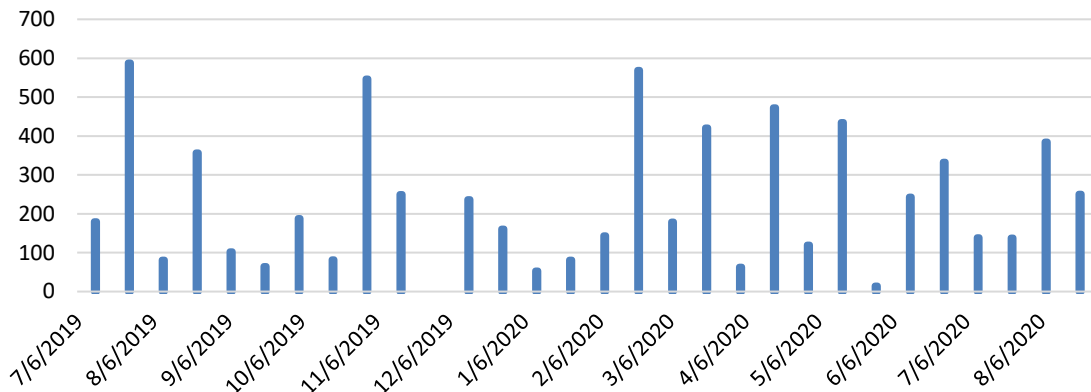
*Negative MMBtu savings indicates thermal interactive effects with lighting measures.

Rebate Type (through 8/31)	Projects
Light Bulbs	91,408
Appliance Rebates	1,549

F) Distributor Initiatives Program

- Field staff are collecting and sharing market share data for heat pump water heater and ECM (Electronically Commutated Motor) circulator pump sales by distributor branch. This has helped manufacturers focus their training efforts on the lowest performing branches and is yielding continuous increases in market share. Distributors report that heat pump water heaters were 75% of top selling electric water heaters in August and that ECM circulator pumps were 52% of top selling circulator pumps, up from 45% last month.
- Sales through the distributor lighting initiative for FY2021 continue to be slower than the start of FY2020 but are similar to the sales levels towards the end of FY2020. The total volume of lighting sales and discounts paid through the “distributor channel” to date represent:
 - 16% are screw-bulb (12% of discounts paid)
 - 84% are mogul and T8, T5, and T5HO linear replacement lamps (88% of discounts paid)
 - The lamp types with the highest volume of sales continue to be 4’ LED linear replacement lamps followed by PAR38 screw-in lamps.

Bi-Weekly Distributor HPWH Sales (invoiced)



Updated Financials	Program Investment
FY2021 Program Budget	\$9,984,000
7/1 to 8/31 Spending	\$1,050,684
Percent of Budget Spent to Date	11%
Percent of Year Passed	17%

Energy Savings (through 8/31)	Annual kWh Savings	Annual MMBtu Savings*
Electric Programs	2,092,023	6,019
Thermal Programs	-	880

*Negative MMBtu savings indicates thermal interactive effects with lighting measures.

Rebate Type (through 8/31)	Units	Projects
Distributor Lighting	13,272	-
Distributor HVAC (Oil)	-	202
Distributor HVAC (Electric)	-	354
Distributor Hot Water (Electric)	-	913

G) Low-Income Initiatives

- Low Income Direct Mail: The Trust is not currently running this initiative and has no new mailers scheduled. Staff continue to fulfill requests from FY2020 and to date have sent Do-It-Yourself (DIY) kits to 392 low income households.
- Low Income Heat Pump Water Heater Initiative: reflecting the impacts of the pandemic, the pace was slow over the summer months, with only 118 systems installed to date. Marketing to low-income renters and cross marketing to those who have received other rebates will be staff’s focus.
- Arrearage Management Program (AMP): Staff have enlisted Efficiency Maine’s call center to make outbound calls to a pre-sorted list of AMP enrollees who have not yet taken advantage of the heat pump water heater offer but appear to be well-suited for one. Call center staff are halfway through the list of 257. Since July 1, 2020, 143 new enrollees have been added to AMP.
- Affordable Heat Initiative: Heat pump marketing has been effective and, using an enhanced rebate of \$2,000, AHI is achieving an average of 100 installs a month among the low- and moderate-income customer segment. The customers are paying the balance of the project cost with their own funds. Reservation requests are also up, creating a healthy pipeline. The table below, listing the qualifying assessed property value limit to establish eligibility, by county, shows that activity for this initiative is concentrated in northern Maine. Staff are on pace to fully invest the heat pump funds earmarked for the low- and moderate-income segment by June 30, 2021 if this trend continues.

County	Assessed Value Limit	# Assessed Value Reservations
Penobscot	\$ 90,000	314
Aroostook	\$ 80,000	192
Somerset	\$ 80,000	78
Kennebec	\$ 100,000	49
Waldo	\$ 100,000	34
Piscataquis	\$ 80,000	22
Oxford	\$ 90,000	11
Franklin	\$ 90,000	10
Hancock	\$ 100,000	9
Androscoggin	\$ 100,000	6
Washington	\$ 80,000	6
York	\$ 100,000	2
Lincoln	\$ 100,000	1
Knox	\$ 100,000	1
Cumberland	\$ 100,000	0
Sagadahoc	\$ 100,000	0

Low Income Direct Install Weatherization: A direct-install initiative for weatherization upgrades will be launched in October to cover all cost effective air sealing and insulation to a subset of LIHEAP homes where MaineHousing’s Weatherization Assistance Program (WAP) has not been available.

Updated Financials	Program Investment
FY2021 Program Budget	\$9,015,000
7/1 to 8/31 Spending	\$612,535
Percent of Budget Spent to Date	7%
Percent of Year Passed	17%

Additional Details on FY2021 Financials	Program Investment
Expenditures	\$9,015,000
Committed Pipeline	\$345,700
Total (Expenditures & Committed Pipeline)	\$958,235
Percent of Current Budget	11%

Energy Savings (through 8/31)	Annual kWh Savings	Annual MMBtu Savings*
Electric Programs	263,244	(38)
Thermal Programs	(447,406)	5,667

*Negative MMBtu savings indicates thermal interactive effects with lighting measures.

Initiative (through 8/31)	Units
Direct Installs	129
Market-based Installs	8

H) Renewable Energy Demonstration Grants Program

- The Trust has no new information to report on this initiative this month.

I) Electric Vehicle (EV) Initiatives

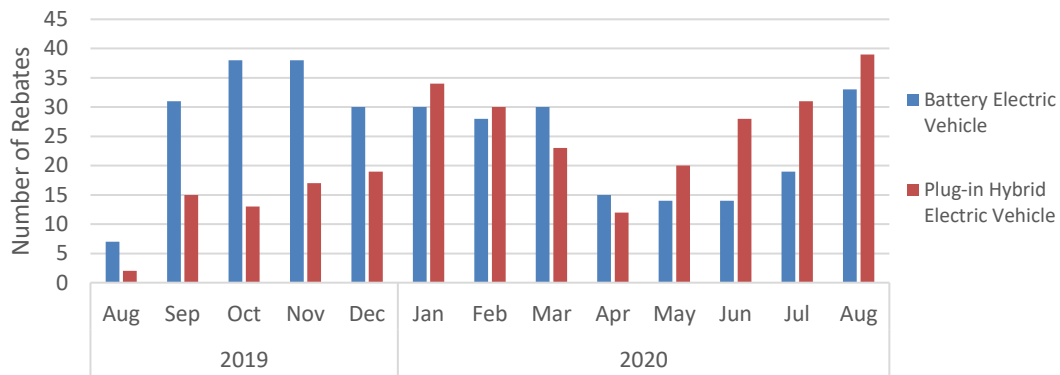
Electric Vehicle Supply Equipment (EVSE) Initiative

- Issued the Level 2 EV Chargers RFP; accepting proposals until December 1 at 3:00 PM. The Trust is particularly interested in bids from large employers, apartment managers, retail centers and other locations where there is a high probably of EV parking now and in the future. This program is one of two pilot grant programs authorized by the MPUC to inform future consideration of programs to promote beneficial electrification of transportation. The other, administered by CMP, establishes a make-ready grant program for Level 2 EV charger plugs. Both programs have enough funding to install approximately 60 plugs.
- All awardees from Round 1 of the Level 2 EV charger grants have completed their projects including a total of 12 new plugs across Milbridge, Calais, Greenville, and Fort Kent. Awarded installations from Round 2 are nearing completion this fall.

EV Rebates

- In August, 72 EV rebates were issued – the most of any month during the program
- Between August 29, 2019, and August 31, 2020, 610 rebates were issued through 48 car dealers participating in the EV Rebate Program. The rebates were for 327 battery electric vehicles (BEVs) and 283 plug-in hybrid electric vehicles (PHEVs).
- Two dealerships have joined the program: York's of Houlton and Bodwell Chrysler Jeep Dodge Ram in Brunswick

Total EV Rebates per Month by BEVs/PHEVs



Technology Type	Number of Rebates
BEV (Battery Electric Vehicle)	327 (53 Teslas)
PHEV (Plug-in Hybrid Electric Vehicle)	283
Total	610

Updated Financials	Electric Vehicle Supply Equipment	EV Accelerator Program
FY2021 Program Budget	\$1,953,134	\$928,012
7/1 to 8/31 Spending	\$12,520	\$170,150
Percent of Budget Spent to Date	1%	18%
Percent of Year Passed		17%

EV Public Education and Outreach

- Staff participated in a webinar about the Basics of Driving Electric in Maine as part of Drive Electric Week, a nationwide celebration to raise awareness of the benefits of EVs
- Staff is preparing to launch another radio ad campaign airing in the Portland, Brunswick, Topsham, and Bangor areas about the benefits of EVs, their range, commuting and charging opportunities with a focus on recreational weekend trips.
- Staff is developing how-to manuals about public charging and home chargers for public consumption through the PUC Pilot project regarding beneficial electrification of transportation. These guidebooks will be coupled with a series of videos to educate both EV owners and potential buyers about the basics of EV charging and to raise awareness about its accessibility. Staff will be interviewing past Level 2 grant awardees and gathering footage to inform these materials
- Staff is expanding budget on digital advertising to increase exposure and attract more general shoppers, those who are searching about cars but not necessarily EVs, to the website.

Strategic Initiatives

- **Innovation**
 - The test year concluded for the Residential Distributed Energy Resources (DER) aggregation and controls pilot. The Trust and ReVision Energy are currently

analyzing pilot data to better understand the role that load shifting, demand response, and smart devices can play in future program activity. The Trust anticipates publishing a final report this Fall.

- Isle au Haut and Stash Energy were able to overcome substantial logistical barriers resulting from COVID closing the Canadian border; units will be shipped and installed this Fall.
 - The Trust and Energy Solutions finalized customer outreach materials for the PCM pilot and continue with customer recruitment efforts.
 - The Trust and ERS launched the customer acquisition phase of the L2 Smart Charging Pilot: sending emails containing program information and links to the Enel X charger webstore to all past EVA participants, working with dealerships to provide new car buyers information regarding our rebates on smart charging equipment, and establishing Google advertisements to capture potential participants in the research phase of their car purchase. Convergence Data Analytics (CDA) supplied the Trust with a draft Residential L2 EV Charging Maine State Baseline report. The Trust is working with ERS and CDA to finalize this report.
 - Ridgeline Energy Solutions has begun to recruit participants for the Commercial Split System Heat Pump Water Heater pilot, targeting commercial spaces with high water usage such as breweries, laundromats, and commercial kitchens.
- **Evaluation, Measurement & Verification**
 - Light loggers are being removed from the field for the Retail/Distributor Lighting and Small Business Initiative Evaluations. These loggers have been deployed for 9 months. The data they collected will be analyzed to determine lighting usage profiles to verify and refine savings estimates.
 - The Residential New Construction Baseline Assessment study is focusing recruitment on builders, real estate agents and mobile home brokers to profile unoccupied homes when possible.

3. Administration and Finance Highlights

A) Administration

- Staff is researching and developing plans to re-open the offices to employees.
- The independent audit was completed by Runyon Kersteen and Ouellette (RKO). The auditors issued a clean audit, reporting no significant deficiencies and no material weaknesses.
- Michelle Fenlason has rejoined the staff in the position of Administrative Assistant.

B) Financial

Revenues

- The sum of the year's new revenues from state and regional sources through the end of August 2020 was \$9.7 million out of a revised total expected annual revenue of \$53.8 million. Approximately \$152,600 in additional revenue has been received year-to-date on interest from outstanding loans and other miscellaneous revenues. Year-to-date, the Trust has made interfund transfers of \$409,000.

Expenditures

- Total expenditures through the end of August 2020 were \$7.11 million of which approximately:
 - i. \$435,000 was spent on Administration (excluding interfund transfers)
 - ii. \$14,000 was spent on Public Information
 - iii. \$40,000 was spent on Evaluation work
 - iv. \$17,000 was spent on Innovation pilots
 - v. \$612,000 was spent on Low Income Initiatives
 - vi. \$889,000 was spent on Retail Initiatives Program
 - vii. \$1.05 million was spent on the Distributor Initiatives Program
 - viii. \$2.04 million was spent through HESP
 - ix. \$1.0 million was spent through the C&I Prescriptive Program
 - x. \$148,000 was spent on the C&I Custom Program
 - xi. \$268,000 was spent on the Small Business Initiative
 - xii. \$0 was spent in Inter-Agency Transfers
 - xiii. Another \$59.55 million is encumbered across all budget categories but is not yet spent.