

# Executive Director's Summary Report

to the Board of Trustees  
of the  
Efficiency Maine Trust

April 28, 2021

## 1. Public Information and Outreach

### A) Awareness and Press

- Press

- *Centralmaine.com* reported on April 15 that the Fairfield Town Council approved the leasing of three electric vehicles for town employees, at no cost to the town, using a combination of rebates from the manufacturer and Efficiency Maine (<https://www.centralmaine.com/2021/04/15/broadband-study-pfas-mailer-focus-at-fairfield-town-council-meeting/>).
- The [*Portland Press Herald*] *Southern Forecaster* features Efficiency Maine's municipal electric vehicle rebates in an extensive April 15 article (<https://www.pressherald.com/2021/04/15/south-portland-scarborough-taking-advantage-of-electric-car-rebates/>).
- The *Sun Journal* ran on April 15 Efficiency Maine's press release on its partnership with Maine's Office of State Fire Marshal to offer Building Energy Code training (<https://www.sunjournal.com/2021/04/15/training-on-energy-code-changes-offered/>). The *Bangor Daily News* also ran the press release on April 15 (<https://bangordailynews.com/2021/04/15/bdn-maine/efficiency-maine-and-maines-office-of-state-fire-marshal-offer-training-on-changes-to-maines-building-energy-code/>).
- *Seacoastonline* highlights Kittery's plan to lease two electric vehicles using EMT rebates in an April 14 article (<https://www.seacoastonline.com/story/news/local/2021/04/14/electric-vehicles-coming-kittery-town-leaders-give-green-light/7201333002/>).
- *The Eastern Gazette* covered Efficiency Maine's Municipal FON in an extensive April 8 article that featured interviews with some municipalities benefiting from the program ([http://easterngazette.com/issues/2017/04\\_09\\_21.html#page=2](http://easterngazette.com/issues/2017/04_09_21.html#page=2)).
- In an April 7 article, *Village Soup – Waldo* covered Efficiency Maine's staff presentation during a Belfast Climate Crisis Committee panel webinar that explored aspects of natural gas and heat pumps as heating sources (<https://waldo.villagesoup.com/p/panelists-discuss-natural-gas-heat-pumps-during-virtual-talk/1887250>).
- *92 Moose* online radio ran an April 5 story featuring information about the expansion of the EV charging network in Maine and Efficiency Maine's EV Program (<https://92moose.fm/it-might-surprise-you-that-maine-has-so-many-charging-stations/>).
- Efficiency Maine's resources for small businesses are highlighted in a blog post on the Maine Small Business Development Centers website (<https://www.mainesbdc.org/environmental-conscious-cost-savings/>).

- In a report from the Camden Town Manager, *Village Soup* (Knox) mentions that the town is working with Efficiency Maine on an LED lighting upgrade project for all town buildings (<https://knox.villagesoup.com/p/rawson-avenue-bridge-pedestrian-safety-energy-improvement-updates/1886564>). *The Penobscot Bay Pilot* also covered the report (<https://www.penbaypilot.com/article/camden-town-manager-s-report-midcoast-energy-meeting-rawson-ave-pedestrian-bridge-dep/145099>).
- The Executive Director was interviewed for a podcast about Efficiency Maine's electric vehicle program that aired on March 25 on News Radio WGAN (<https://wgan.com/podcasts/maine-points-efficiency-maine/>). The segment also was aired on seven additional affiliate stations on March 28 -- WPOR 101.9, Rewind 100.9, Coast 93.1, 98.9 WCLZ, The Outlaw 101.5/970, 107.1/93.5 The Bay, and Pure Oldies 105.5.
- WABI TV5 ran a segment on March 24 featuring Efficiency Maine's commercial program senior manager speaking about the benefits of the Small Municipality FON issued in early February (<https://www.wabi.tv/2021/03/25/efficiency-maine-project-bringing-relief-to-eligible-municipalities/>).
- The March 2021 issue of *Maine Town & City*, the magazine of the Maine Municipal Association, quoted the Executive Director in an extensive article about electric vehicle rebates for municipalities ([https://www.memun.org/DesktopModules/Bring2mind/DMX/Download.aspx?Command=Core\\_Download&EntryId=14652&language=en-US&PortalId=0&TabId=119#page=19](https://www.memun.org/DesktopModules/Bring2mind/DMX/Download.aspx?Command=Core_Download&EntryId=14652&language=en-US&PortalId=0&TabId=119#page=19)).
- *The Maine Monitor* quoted the Executive Director in a March 21 article about the state's need to reduce fossil fuel consumption (<https://www.themainemonitor.org/adopting-clean-energy-requires-turning-away-from-fossil-fuels/>). The article was reprinted in the April 4 issue of the *Penobscot Bay Pilot* (<https://www.penbaypilot.com/article/maine-needs-strategic-plan-policy-changes-get-households-businesses-fossil-fuels/144949>).
- A March 19 commentary article in the *Brunswick Times Record* quotes an Efficiency Maine program manager about how Brunswick schools are preparing students for careers in sustainability and energy-related fields (<https://www.pressherald.com/2021/03/19/commentary-brunswick-prepares-students-for-jobs-in-sustainability/>).
- Coverage of E2Tech's international virtual webinar on EV business opportunities in Maine and Quebec continued on March 18 in *Government Technology* with a reprint of the Portland Press Herald article (<https://www.govtech.com/fs/Quebecs-Electric-Vehicle-Shift-Offers-Lessons-for-Maine.html>).

- **Events**

- Staff presented on the electric vehicle program for the April 15 Maine Municipal Association's Technology & New Energy Municipal Conference.
- Staff participated in an information-sharing event hosted by the Eastern Area Agency on Aging on April 6 with representatives from Eastport municipality, Community Action Program, Aging Agency volunteers, and The Island Institute.
- Staff presented an overview of the Efficiency Maine heat pump and electric vehicle programs during a March 31 meeting of the Kittery Town Council Climate Adaptation Committee.
- Staff presented on the Efficiency Maine heat pump program for the March 29 meeting of the Belfast Climate Crisis Committee.

- **Website and Outreach**
  - 44,822 website visits
    - 29,034 unique visitors
    - 7,169 visits website driven through digital ads
  - Facebook
    - 3,727 fans
  
- **Call Center (March)**
  - 2,094 inbound phone calls were received, up from 1,925 this month last year. Inquiries about heat pumps are the primary call driver.
  - 95% of calls were answered within 20 seconds (vs. a goal of 90%).
  - 870 inbound emails were received, up from 700 this month last year.
  - 550 pieces of inbound mail were processed, down from 7,552 month last year (when we were in the midst of a campaign reaching out to low income households).
  - 718 outbound calls were made to schedule residential heat pump and heat pump water heater virtual inspections.
  
- **Government Relations**
  - Highlights for the Trust’s activities related to the Maine Public Utilities Commission (PUC) include:
    - Supported the Non-Wires Alternatives Coordinator’s (NWAC’s) undated NWA analysis on Section 31 (Brunswick/Topsham).
    - Working with the NWAC to prepare for a filing on Section 80 (Camden/Rockland).
    - Collaborating with Versant on a reliability upgrade in the Old Town area.
    - Provided the PUC with information on the use of batteries in our demand management pilots as the PUC considered the use of batteries in net energy billing agreements.

<b>2. Program Highlights<sup>1</sup></b>
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**A) C&I Prescriptive (CIP) Program**

- The pipeline of pending electric projects has stayed consistent over the last month, representing \$4.2 million in project commitments. The pipelines for RGGI (\$792,000) and natural gas (\$253,000) projects have remained consistent over the last month.
- Funding Opportunity Notice (FON) updates:
  - The Small Municipality Retrofits FON was an opportunity for small municipalities with a population of less than 4,000 to participate in enhanced lighting and heat pump incentives with financial assistance from The Nature Conservancy (TNC). A summary of results follows:

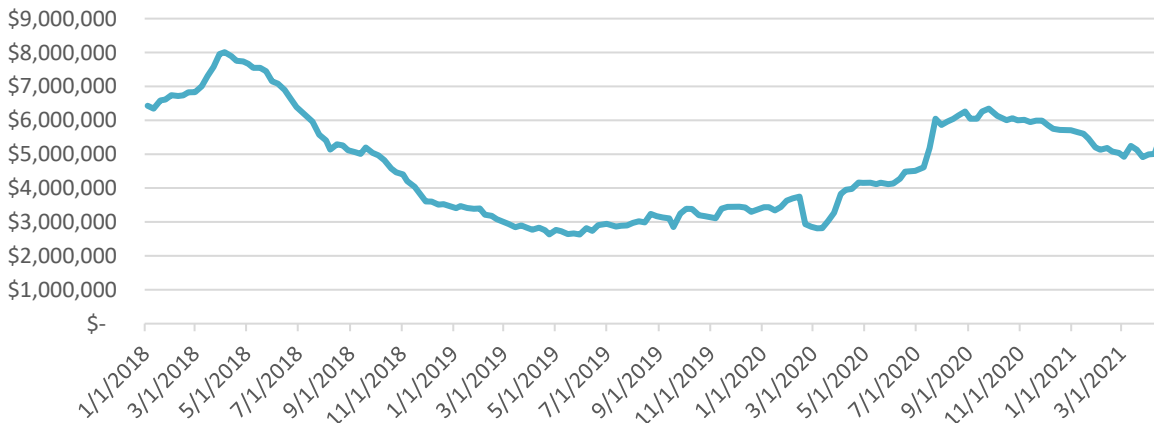
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<sup>1</sup> The Updated Financials table reported for each Program reflects data pulled from the Trust’s financial management system at mid-month; the Energy Savings table reflects data pulled from the Efficiency Maine project tracking database on April 23, 2021, to capture the progress for the year through the most recent complete month of reported actual results (i.e., through the end of March 2021).

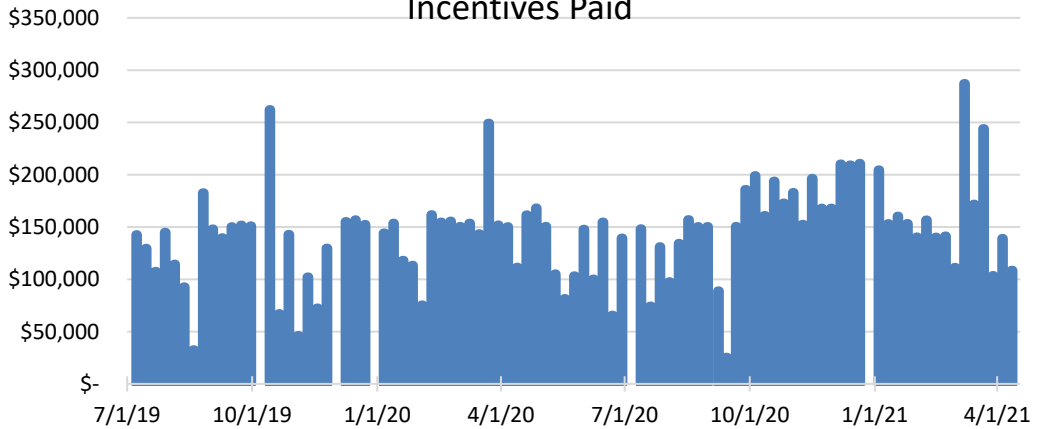
FON-004 Small Municipality Retrofits	
Number of Municipalities	80
Total Number of Projects	142
Anticipated Efficiency Maine Incentive	\$427,282
Anticipated TNC Incentive	\$188,392
<b># Lighting Projects</b>	
# Lighting Projects	48
Approved Lighting Incentives	\$123,282
<b># Heat Pump Projects</b>	
# Heat Pump Projects	94
# Heat Pump Units	189
Approved Efficiency Maine Incentive	\$304,000
Approved TNC Incentive	\$188,392

- A FON for Hospitality Retrofits launched in April and will be accepting applications through June 1. This FON is an opportunity for businesses in Maine’s hospitality industry (restaurants, hotels, motels) to participate in enhanced lighting, heat pump and variable refrigerant flow system projects, and refrigeration retrofits. Three informational webinars were held throughout April. Projects are scheduled to be completed by September 3.
- Incoming calls through live transfers from the Call Center or direct from Qualified Partners increased by 30% in March as compared to February. The program team received 481 calls throughout the month of March.
- The program team is continuing with virtual inspections and pictures where possible. Onsite field visits were halted mid-December due to concerns regarding COVID. The team was assigned 64 inspections over the last month.
- The program recently launched two new HVAC measures: Vertical Packaged Terminal Heat Pumps (VPTHP) and Energy Recovery Ventilators (ERVs). These new measures are included in the Hospitality Retrofits FON.

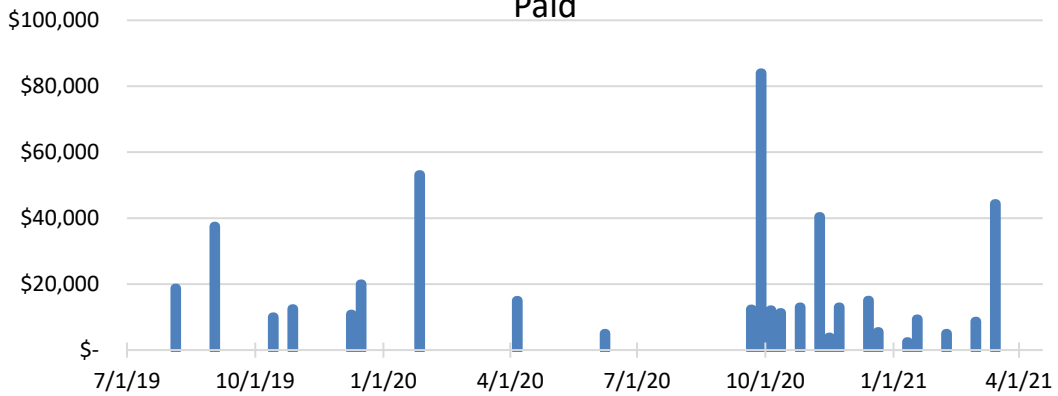
### CIP - Pipeline



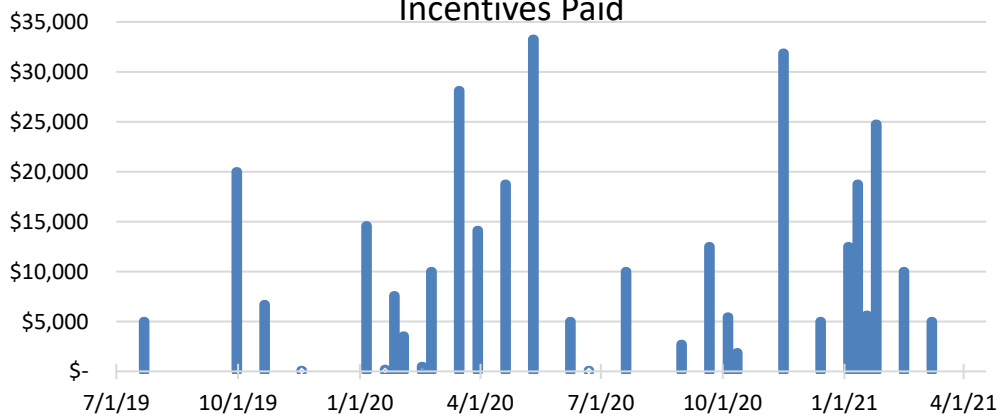
### C&I Prescriptive Program Electric Measures Incentives Paid



### C&I Prescriptive Program All Fuels Measures Incentives Paid



### C&I Prescriptive Program Natural Gas Measures Incentives Paid



<b>Updated Financials</b>	<b>Program Investment</b>
FY2021 Program Budget	\$19,561,679
7/1 to 3/31 Spending	\$7,053,234
Percent of Budget Spent to Date	36%
Percent of Year Passed	75%

<b>Additional Details on FY2021 Financials</b>	<b>Program Investment</b>
Expenditures	\$7,053,234
Committed Pipeline	\$4,991,414
Total (Expenditures and Committed Pipeline)	\$12,044,648
Percent of Current Budget	62%

<b>Energy Savings (through 3/31)</b>	<b>Annual kWh Savings</b>	<b>Annual MMBtu Savings*</b>
Electric Programs	32,778,357	(730)
Thermal Programs	-	27,606

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

<b>Project Type (through 3/31)</b>	<b>Projects</b>
Prescriptive Lighting Solutions	829
Electric Heating and Cooling Solutions	408
Compressed Air Solutions and Other	58
Natural Gas Heating and Cooling Solutions	19
All Fuels Heating and Cooling Solutions	10

## **B) C&I Custom Program**

- The C&I Custom Program Review Team met once and approved 5 projects worth \$431,475 in incentive offers.
- The pipeline has grown modestly, adding 8 new projects. The total pipeline now consists of 9 projects worth \$152,897 in incentive offers, after adjusting for probability of completion.
- Program staff did not receive any new requests for scoping audits or Technical Assistance (TA) studies.
- Program staff reviewed 1 project proposal that did not meet the program requirements and will not proceed further in the process.

Updated Financials	Program Investment
FY2021 Program Budget	\$11,448,039
7/1 to 3/31 Spending	\$2,722,468
Percent of Budget Spent to Date	24%
Percent of Year Passed	75%
Additional Details on FY2021 Financials	Program Investment
Expenditures	\$2,722,468
Committed	\$5,584,171
Pipeline	\$152,897
Total (Expenditures, Committed and Pipeline)	\$8,459,536
Percent of Current Budget	74%

Energy Savings (through 3/31)	Annual kWh Savings	Annual MMBtu Savings
Electric Programs	5,354,848	305
Thermal Programs	(1,087)	3,885

### C) Small Business Initiative (SBI)

- Activity summary:

Running Totals	Region 18 Millinocket Area	Region 19 Brewer	Region 20 Bucksport Area	Region 21 Belfast Area	Region 22 Belgrade Lakes Area	Region 23 Lewiston/Auburn
Region Launch Date	Mar-20	May-20	Aug-20	Sep-20	Sep-20	Jan-21
# of Participating Lighting Contractors	20	19	18	13	12	7
Lighting Assessments Requested/Assigned	126	77	46	70	69	26
Lighting Assessments Completed	123	67	41	51	61	21
Pre-approved Projects	112	59	34	33	50	20
Signed SOWs	103	52	31	26	37	12
Lighting Installations Underway	18	2	2	1	18	2
Lighting Projects Completed & Paid	80	50	16	18	14	5

- Region 17 (Dover-Foxcroft area) closed out this month. Results are as follows:

Region 17	Dover-Foxcroft Region		
	Region Totals	Average Project	
# Jobs	95		
Project Cost	\$ 440,242	\$ 4,634	
Incentive	\$ 372,207	\$ 3,918	
Incentive %	84.5%		
Annual kWh Savings	811,871	8,546	

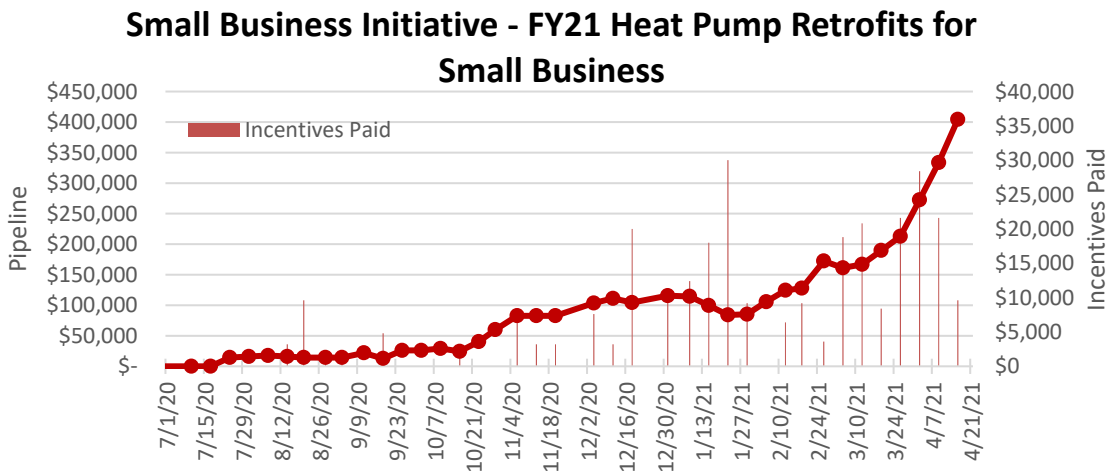
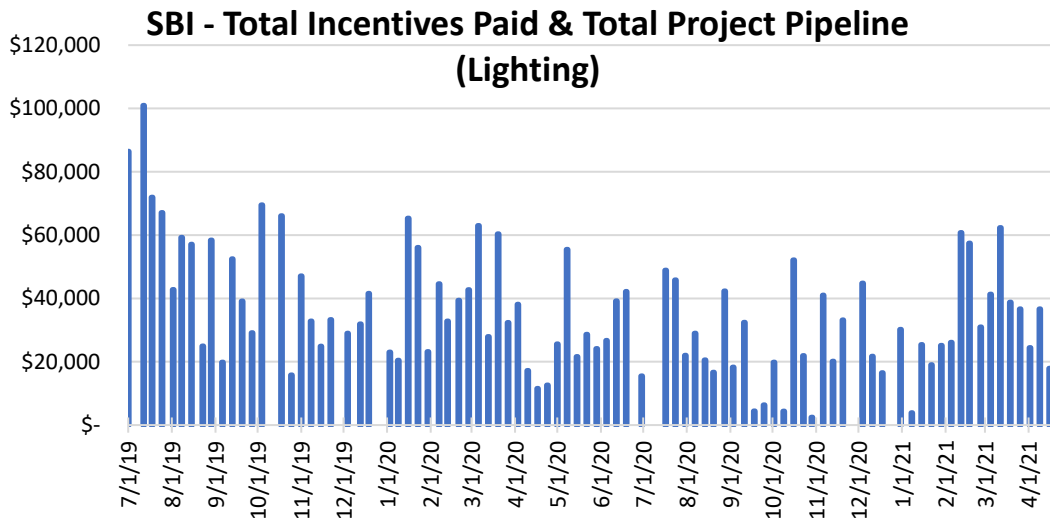
Lifetime MWh Savings		10,554	111
Annual \$ Savings	\$	121,781	\$ 1,282
Monthly \$ Savings	\$	10,148	\$ 107
Notes: Savings based on \$0.15 per kWh.			

- Region 18 (Millinocket area) was rolled out in March 2020 and is now in the process of finishing installations. Five participating contractors have remaining SBI projects in their queue, with a deadline of completing installations by the end of April.
- Region 19 (Brewer) was launched in May 2020 and is also in the closeout process. A “last-chance” mailer was sent out last month notifying eligible businesses they had until March 31, 2021 to request a lighting assessment. Participating contractors have through May 2021 to complete their remaining SBI installations.
- Regions 20 (Bucksport Area), 21 (Belfast Area), and 22 (Belgrade Lakes Area) were launched late August/September 2020 and are all open. Small businesses in this region may be eligible for enhanced lighting and heat pump incentives. A call campaign is underway to assess opportunity.
- Region 23 (Lewiston/Auburn) was launched in January. Seven contractors have signed on to participate so far. The rate of incoming customer inquiries from interested local businesses is slowing, so a second mailer is planned to be sent out.
- Promotional coupons are being sent to small businesses, in targeted regions, that completed lighting projects through SBI in the past (referred to as “SBI graduates”). The coupons offer an additional \$400 off an eligible heat pump system (up to 3 systems maximum). The program team conducted a follow-up call campaign to ensure businesses received their coupons and helped answer questions regarding possible projects and next steps.

### Small Business Initiative - Total Project Pipeline (Lighting)







Updated Financials	Program Investment
FY2021 Program Budget	\$5,693,080
7/1 to 3/31 Spending	\$1,596,615
Percent of Budget Spent to Date	28%
Percent of Year Passed	75%
Additional Details on FY2021 Financials	Program Investment
Expenditures	\$1,596,615
Committed Pipeline	\$443,233
Total (Expenditures & Committed Pipeline)	\$2,039,848
Percent of Current Budget	36%

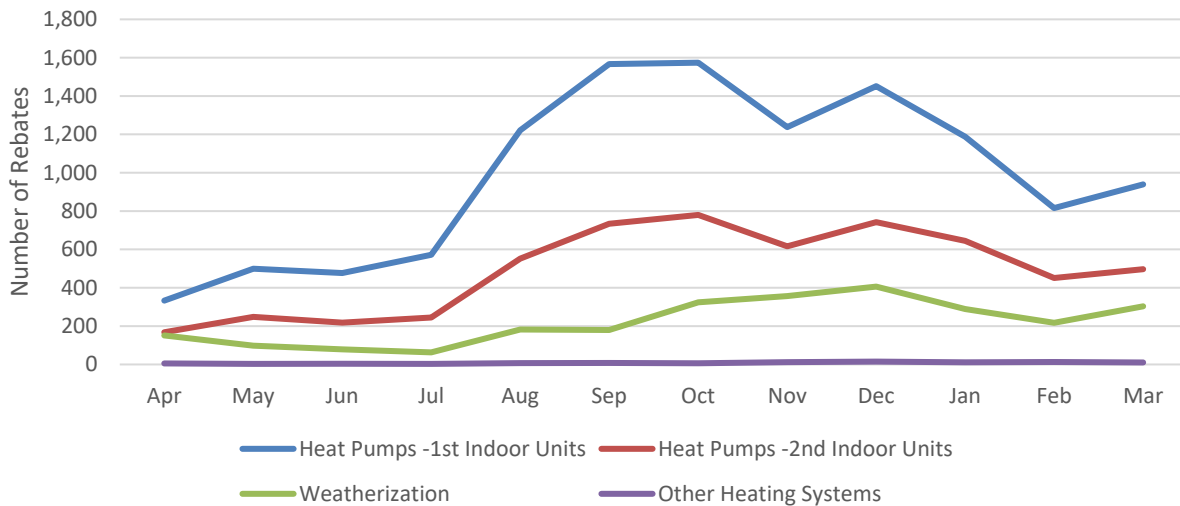
Energy Savings (through 3/31)	Annual kWh Savings	Annual MMBtu Savings*
Electric Programs	2,408,136	(2,300)

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

**D) Home Energy Savings Program (HESP)**

- HESP is on track to invest 100% of its funding. The program continues to see demand for heat pump rebates that is more than double last year’s volume.
- Approximately 89% of customers who had their homes inspected by the HESP program rated their experience a nine or ten on a scale of zero to ten.

**HESP Number of Rebates - Last 12 Months**



Updated Financials	Program Investment
FY2021 Program Budget	\$19,782,220
7/1 to 3/31 Spending	\$14,469,863
Percent of Budget Spent to Date	73%
Percent of Year Passed	75%

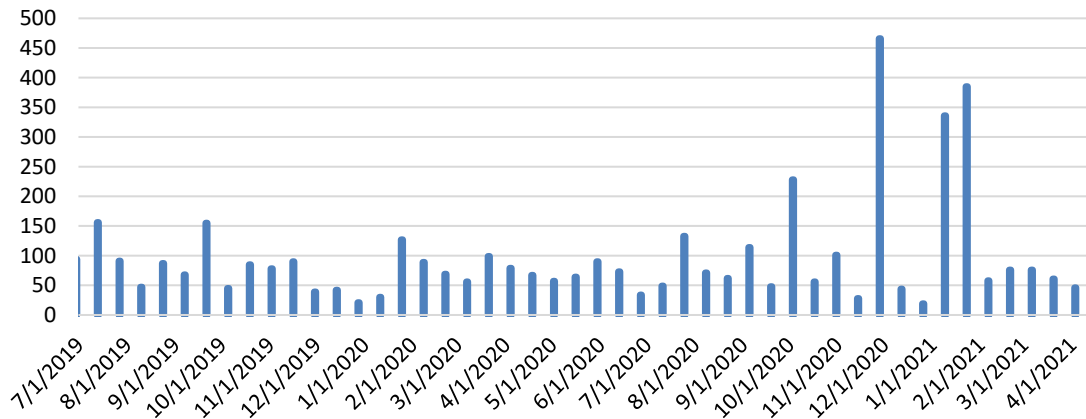
Energy Savings (through 3/31)	Annual kWh Savings	Annual MMBtu Savings
Electric Programs	-	179,406
Thermal Programs	735,761	29,470

Project Type (through 3/31)	Participating Households
Electric Measures	11,223
All Fuels Measures	1,339
Natural Gas Measures	-

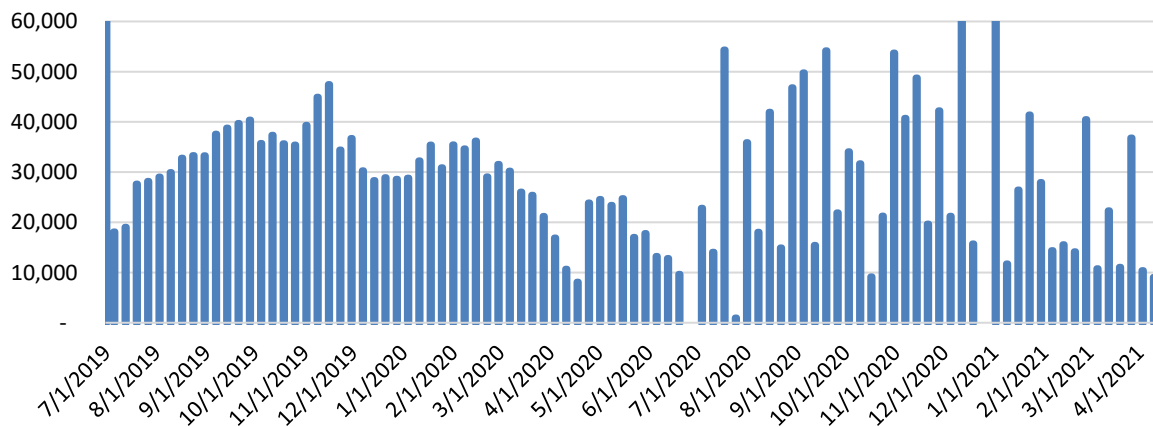
**E) Retail Initiatives Program**

- This program is on track to invest all its funding by year-end and promotional activity is limited.
- Estimated market share for heat pump water heaters in retail was 33% in February.

**Bi-Weekly Retail HPWH Sales (invoiced)**



**Weekly Bulb Sales – Retail (including unaudited estimates)**



Updated Financials	Program Investment
FY2021 Program Budget	\$7,466,470
7/1 to 3/31 Spending	\$5,775,137
Percent of Budget Spent to Date	77%
Percent of Year Passed	75%

Energy Savings (through 3/31)	Annual kWh Savings	Annual MMBtu Savings*
Electric Programs	37,015,203	(20,212)

Energy Savings (through 3/31)	Annual kWh Savings	Annual MMBtu Savings*
Thermal Programs	-	-

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

Rebate Type (through 3/31)	Projects
Light Bulbs	1,100,768
Appliance Rebates	7,947

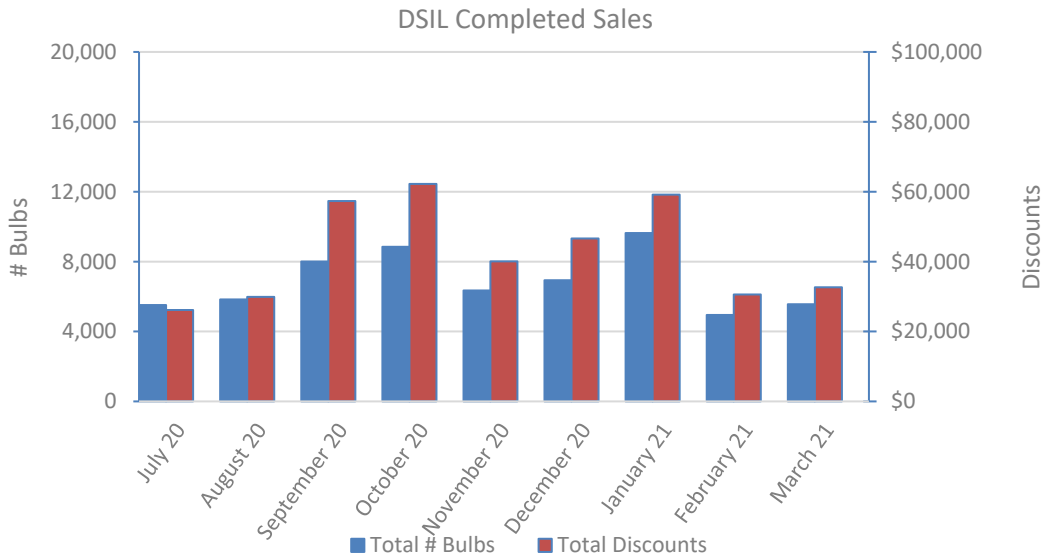
## F) Distributor Initiatives

### Distributor Non-Lighting

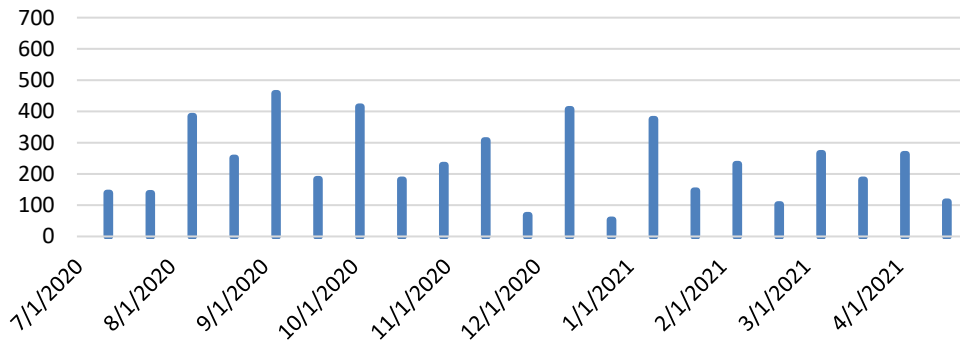
- The pace of heat pump water heater (HPWH) rebates continues to be strong and the program anticipates investing all available funding.
- For March, distributors report that HPWHs constituted 80% of the top-selling electric water heaters in Maine. The national average is 2%. ECM circulator pumps were 45% of top-selling circulator pumps.
- A \$200 mail-in rebate for ENERGY STAR® smart thermostats for customers of Unitil and Bangor Natural Gas was launched in February and over 300 people reserved rebates in the first week. Another 536 people reserved rebates in March. The team is estimating 184 participants by the time the offer ends 4/15/2021.

### Distributor Lighting

- The total volume of lighting sales and discounts paid through the distributor channel to date represent the following characteristics:
  - 12% are screw-bulb (8% of discounts paid)
  - 88% are mogul and T8, T5, and T5HO linear replacement lamps (92% of discounts paid), this is consistent with last month.
- The lamp types with the highest volume of sales continue to be 4' LED linear replacement lamps (74%) followed by PAR38 screw-in lamps (4%).



### Bi-Weekly Distributor HPWH Sales (invoiced)



Updated Financials	Program Investment
FY2021 Program Budget	\$9,313,229
7/1 to 3/31 Spending	\$5,648,139
Percent of Budget Spent to Date	61%
Percent of Year Passed	75%

Energy Savings (through 3/31)	Annual kWh Savings	Annual MMBtu Savings*
Electric Programs	11,006,728	25,330
Thermal Programs	-	13,732,397

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

Rebate Type (through 3/31)	Units	Projects
Distributor Lighting	60,869	-
Distributor HVAC (Oil)	-	2,381
Distributor HVAC (Electric)	-	3,117
Distributor HVAC (NG)	-	198
Distributor Hot Water (Electric)	-	4,515

#### G) Low Income Initiatives

- **Direct Mail:** Year-to-date, the program has fulfilled 2,710 kits to low-income Mainers, predominantly found through the Low Income Home Energy Assistance Program (LIHEAP) list. This represents no change over last month. The mailings are sent by the Maine Department of Health and Human Services (DHHS) based on their database. Including Mainers that meet LIHEAP income limits and family size, and excluding those who received kits in 2019 and 2020, DHHS estimates that up to 181,070 households will be sent the offer in the fourth quarter of this fiscal year.
- **Heat Pump Water Heater Initiative:** To date, installers have completed 473 water heater installations, replacing electric resistance. Another 285 projects are in the pipeline. The program forecasts completing 600 by year-end. Funds from the New England Clean Energy Connect (NECEC) settlement are being used to reduce energy costs and carbon emissions through the installation of water heaters in eligible homes where domestic hot water comes off the boiler system. In this iteration, the program is inviting households with the largest LIHEAP benefit, to target those with the highest energy burden. This new initiative has completed 1 project and has 10 in the pipeline.
- **Arrearage Management Program (AMP):** Since July 1, 2020, the program has 455 new enrollments into AMP. The program continues to provide electricity usage assessments, energy-saving tips, and offers for energy-saving devices.
- **Heat Pumps and Weatherization for Low and Moderate Income (LMI) Households:**
  - Since July 2020, 912 heat pumps have been installed. The pipeline has 112 reservations. The heat pump initiative for LMI is on target to invest 100% of allocated funds by fiscal year end. The program has started investing the NECEC heat pump funds for homes that heat with propane.
  - Since July, 126 weatherization projects have been completed through the initiative, with 22 reservations in the pipeline.
- **Affordable Housing Pilot Initiative:** The program has invited developers of nine affordable housing projects that have received a Notice To Proceed from MaineHousing to receive an incentive if they achieve Passive House standards. The program is offering to help with energy savings modeling and certification costs and to contribute 3% of construction costs.

<b>Updated Financials</b>	<b>Program Investment</b>
FY2021 Program Budget	\$11,542,425
7/1 to 3/31 Spending	\$4,069,077
Percent of Budget Spent to Date	35%
Percent of Year Passed	75%
<b>Additional Details on FY2021 Financials</b>	<b>Program Investment</b>
Expenditures	\$4,069,077
Committed Pipeline	\$854,250
Total (Expenditures & Committed Pipeline)	\$4,923,327
Percent of Current Budget	43%

<b>Energy Savings (through 3/31)</b>	<b>Annual kWh Savings</b>	<b>Annual MMBtu Savings*</b>
Electric Programs	3,137,767	(743)
Thermal Programs	(2,267,191)	28,996

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

<b>Initiative (through 3/31)</b>	<b>Units</b>
Direct Installs	863
Market-based Installs	161

#### 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

- Staff launched a fourth round of Request for Proposals (RFP) for Level 2 chargers, targeting two categories that constitute underserved areas or places where there are “infrastructure gaps.” The first category includes Northern and Eastern Maine locations and the second includes sites within Central Maine Power utility service territory located at least 10 miles west of I-95. Funds for projects in Category 1 will be paid from the Volkswagen (VW) settlement and funds from Category 2 will be paid using the remaining funds from a program selected by the Maine Public Utilities Commission to pilot “beneficial electrification” in the transportation sector.
- Staff hosted a pre-bid conference call to support project planning in response to the RFP for Level 2 chargers. Proposals are due by June 8, 2021 at 3:00 PM local time.
- The RFP to install DC Fast Chargers through Central and Eastern Maine closed on April 21. More than a dozen locations were proposed. Awards are expected to be announced the second week of May.
- Efficiency Maine hosted a charger unveiling event on April 26 to unveil the new DC Fast Chargers at the Hannaford in North Windham, the final site of the seven Phase 1 sites to be completed. The ceremony featured representatives from Hannaford Supermarkets, Senator

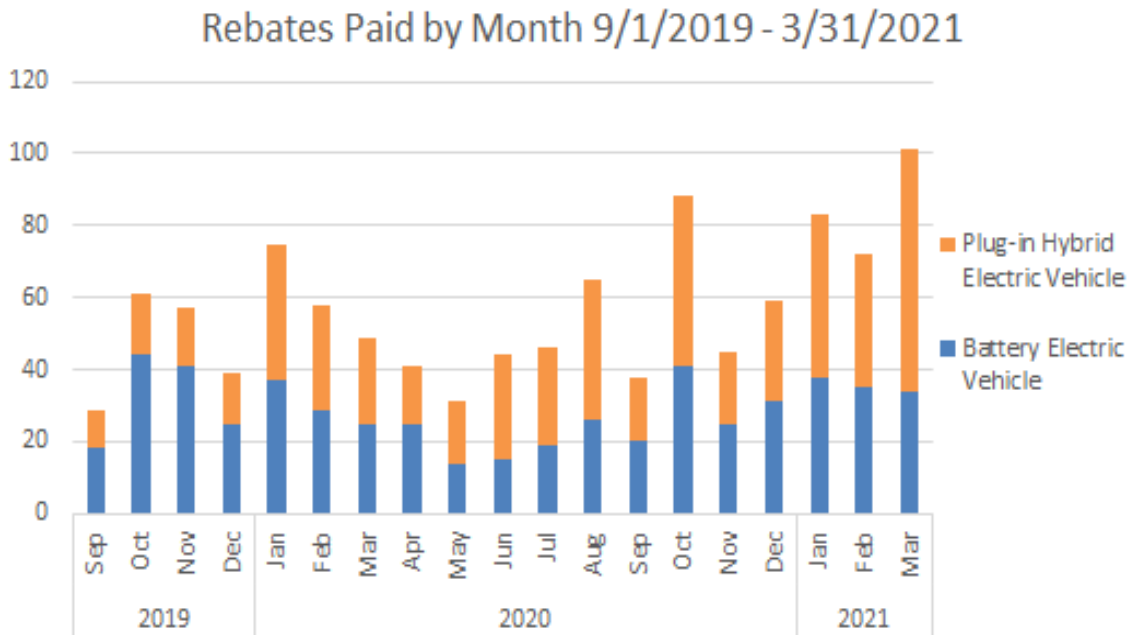
Bill Diamond, as well as representatives from the Sebago Lakes Region Chamber of Commerce and local municipal government.

EV Rebate Program

- The program issued 101 EV rebates in March, the most monthly rebates since the program began. The top models this month were the Toyota Prius Prime, Toyota RAV4 Prime, and Nissan Leaf.
- The program team continues to reach out to EV dealers, including smaller used car dealers that were not previously eligible for the program but are now eligible to provide rebates on used vehicles to low-income customers. We added another dealer to the program, bringing the number of participating dealers to 62.
- Since the launch of increased rebate amounts for governmental entities on December 21, 2020, the Trust has issued 21 rebates to 12 different municipalities, with 20 more municipalities in the pipeline to receive one or more vehicles. The program has gained press coverage in the Portland Press Herald, Seacoast Online, Kennebec Journal, and the Maine Municipal Association’s newsletter.

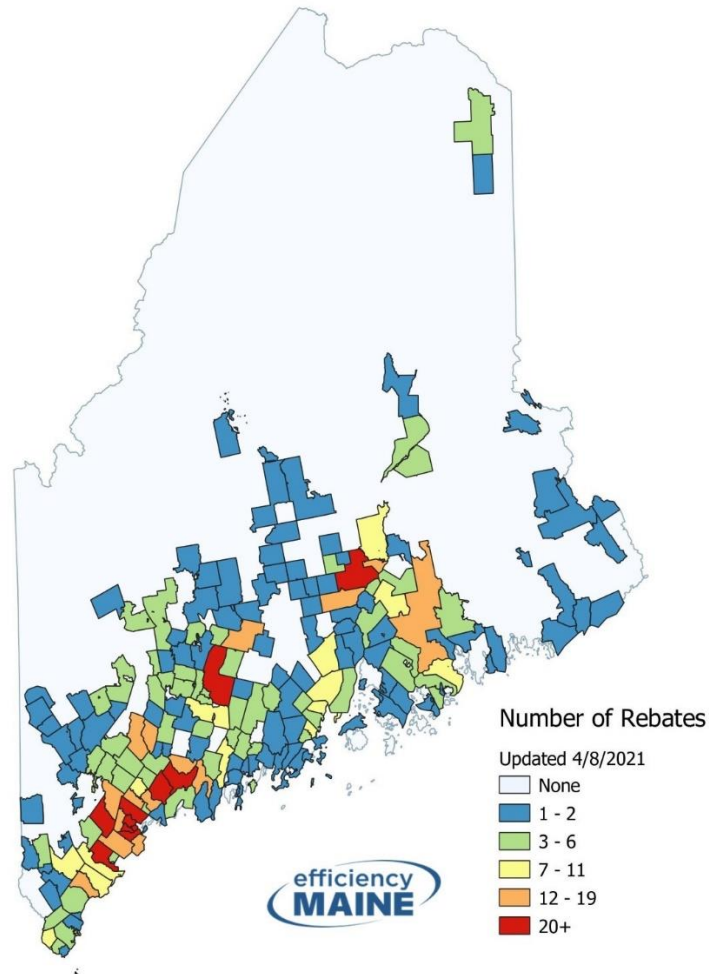
EV Public Education and Outreach

- Staff presented at the Maine Municipal Association’s Technology and New Energy Conference, giving an overview of resources and incentives for municipalities to adopt EVs and install charging infrastructure.
- Staff provided an update to the Maine Climate Council Transportation Working Group about Efficiency Maine’s insights on Maine driving habits and home charging behavior, presenting results from a recent customer survey and an innovation pilot study.





### EV Rebates Paid by Zip Code



Total Rebates By Technology Type (9/1/2019 – 3/31/2021)	Number of Rebates	Dollars Spent
BEV (Battery Electric Vehicle)	542	\$1,245,500
PHEV (Plug-in Hybrid Electric Vehicle)	539	\$546,500
<b>Total</b>	<b>1,081</b>	<b>\$1,792,000</b>

Updated Financials	Electric Vehicle Supply Equipment	EV Rebate Program
FY2021 Program Budget	\$2,597,079	\$1,428,012
7/1 to 3/31 Spending	\$166,000	\$1,073,299
Percent of Budget Spent to Date	6%	75%
Percent of Year Passed		75%

## J) Strategic Initiatives

### • Innovation

#### ○ Phase Change Pilot:

- Ready Seafood signed onto the pilot on March 15. Ready Seafood is a family-run business based out of Portland that supplies live and processed lobster products to customers worldwide.
- Luke's Lobster signed onto the pilot on April 14. Luke's Lobster is a certified B-Corporation with a Maine-based processing facility, 26 lobster shack locations nationally and 11 internationally (as of Fall 2020), in addition to distributing across the country.
- The phase change material installed at Ducktrap River of Maine has become fully operational and is producing data.
- Negotiations are in process with one final site.

#### ○ L2 Smart Charging Pilot

Q1 preliminary findings:

- Over 18,000 kWh was charged on EV batteries across the 30 participants who have completed at least one full quarter in the pilot.
- Average quarterly charging is 622 kWh, which amounts to 207 kWh/month and about 7 kWh/day.
- So far, 73% of charging has taken place off-peak.
- One-third of participants have charged 90%+.

#### ○ Commercial Split System Heat Pump Pilot

- Participant acquisition has entered its second phase with the Trust and its vendor targeting long term care facilities and multi-family housing.

#### ○ Isle au Haut Thermal Storage Pilot

- Ridgeline Energy Analytics completed its first round of metering installation on several of the residential thermal storage heat pumps. Ridgeline will make additional trips to the island in the coming month to complete the build-out of the metering infrastructure and begin the pilot's data collection period.

### • Evaluation, Measurement & Verification

- Efficiency Maine will soon select an evaluation team to conduct the Residential Heat Pump Impact Evaluation. The primary objectives of the evaluation are to quantify and verify electric energy and demand impacts (increases and decreases), verify non-electric energy impacts (increases and decreases), and analyze program cost-effectiveness.

## 3. Administration and Finance Highlights

### A) Administration

- Senior staff have begun discussions to plan reopening of the offices.

### B) Financial

#### Revenues

- The sum of the year's new revenues from state and regional sources through the end of March 2021 was \$47.8 million out of a revised total expected annual revenue of

\$66.2 million. Approximately \$848,750 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 \$2.14 million. The total budgeted revenue for FY2021 is \$71.34 million.

#### Expenditures

- Total expenditures through the end of March 2021 were \$48.39 million of which approximately:
  - i. \$2.33 million was spent on Administration (excluding interfund transfers)
  - ii. \$133,221 was spent on Public Information
  - iii. \$1,021,805 was spent on Evaluation work
  - iv. \$189,256 was spent on Innovation pilots
  - v. \$4.07 million was spent on Low Income Initiatives
  - vi. \$5.78 million was spent on the Retail Initiatives Program
  - vii. \$5.65 million was spent on the Distributor Initiatives Program
  - viii. \$14.47 million was spent through HESP
  - ix. \$7.05 million was spent through the C&I Prescriptive Program
  - x. \$2.72 million was spent on the C&I Custom Program
  - xi. \$1.60 was spent on the Small Business Initiative
  - xii. \$0 was spent in Inter-Agency Transfers
  - xiii. Another \$39.41 million is encumbered across all budget categories but is not yet spent.