

Executive Director's Summary Report

to the Board of Trustees
of the
Efficiency Maine Trust

September 30, 2021

1. Public Information and Outreach

A) Awareness and Press

- **Press** – In this report, Efficiency Maine was mentioned or featured in relevant press coverage on:
 - Efficiency Maine's Electric Vehicle (EV) Program and role in expanding the state's EV infrastructure. The following articles and TV segments highlighted:
 - The transition of Maine police fleets to electric vehicles on *News Center Maine*.
 - The prospects for expanding EV infrastructure in Aroostook County in a news segment on *WAGM-TV 8*.
 - Efficiency Maine's EV program and rebates in the *South Portland Sentry (Portland Press Herald)*.
 - Efficiency Maine's September 2 announcement that it is extending its EV Accelerator Program for another year using funds from the settlement of the New England Clean Energy Connect (NECEC) project in *Green Energy Times* and *Bangor Daily News*.
 - The use by several municipalities of Efficiency Maine rebates to lease or purchase electric vehicles, including the City of Bangor in *Bangor Daily News*; the Town of Thomaston in the *Courier-Gazette*; Town of Gorham in *GorhamTimes*, the City of Rockland in *Village Soup / Courier-Gazette*, and the City of Ellsworth in *The Ellsworth American*.
 - The potential for Maine to receive \$19 million in federal funds to expand the state's electric vehicle infrastructure in the *Portland Press Herald*.
 - The installation and dedication of a charging station in Kennebunk's Lower Village purchased using Efficiency Maine rebates in *Seacoastonline* and the *Portland Press Herald*, respectively.
 - Efficiency Maine's September 1 announcement that it is offering a special promotion to service stations with retail operations to upgrade heating, ventilation, and air conditioning (HVAC) systems, LED lighting, and refrigeration equipment in *Bangor Daily News* and *Green Energy Times*;
 - Efficiency Maine's August 26 announcement that 60 municipalities benefited from the Small Municipality Funding Opportunity offered with The Nature Conservancy in *The Piscataquis Observer* and *Green Energy Times*;
 - Efficiency Maine's Small Business Initiative (SBI) for the Brunswick area in *The Times Record (Portland Press Herald)*. And its SBI for Biddeford/Saco in *Biddeford-Saco-OOB Courier (Portland Press Herald)*.
 - Efficiency Maine's role in the establishment of a green bank for Maine in *The Maine Monitor* (August 29) and *Penobscot Bay Pilot* (September 9). The same topic previously was covered in the same publications on July 25 and July 31, respectively;

- Portland’s Electrify Everything campaign that aims to reduce the use of fossil fuels through encouraging energy efficiency measures and programs, such as rebates from Efficiency Maine, on *WGME TV 13*, *News Center Maine*, and in *Spectrum News* and *Bangor Daily News*.
- Various options for residential air and water heating systems in the *Portland Press Herald*.
- A call to action in an opinion piece by environmental organization York Ready 100% to reduce carbon emissions in households in *Seacoastonline*.
- A new pilot program being designed by Efficiency Maine to install energy storage at critical care facilities in *RTO Insider*; and
- The top 10 climate accomplishments of the 2021 Maine legislature in the *NRCM blog*.

More detailed descriptions and links to these and other articles are included in Appendix A at the end of this report.

- **Events**

- Staff presented on the Efficiency Maine Heat Pump Program during an Ogunquit Sustainability Committee meeting on September 23.
- Staff presented on the Efficiency Maine Heat Pump Program during the September 14 Green & Healthy Maine HOMES + Energy Chat webinar.
- Staff distributed educational materials and coordinated electric vehicle test drives with Efficiency Maine EV Program Participating Dealers during the Wells Electric Vehicle Show on September 12.
- Staff presented on the Efficiency Maine Electric Vehicle Program during the September 10 “Coffee and Climate” virtual meeting hosted by the City of South Portland.
- Staff presented on Efficiency Maine heat pump and electric vehicle programs during the August 25 York Ready for 100% virtual monthly meeting.
- Staff collaborated on heat pump training on August 24 for students of the Kennebec Valley Community College Heat Pump Installer Class.

- **Website and Outreach**

- 34,033 website visits (see Appendix B at the end of this report for more details)
 - 23,069 unique visitors
 - 14,727 visits website driven through digital ads
- Facebook
 - 3,758 fans

B) Call Center (August)

- 1,685 inbound phone calls were received, down from 1,902 this month last year. Inquiries about heat pumps are the primary call driver.
- 97% of calls were answered within 20 seconds (vs. a goal of 90%).
- 777 inbound emails were received, down from 897 this month last year, driven primarily by heat pump water heater rebate claims.
- 774 pieces of inbound mail were processed, up from 587 this month last year.
- 1,211 outbound calls were made to schedule residential heat pump and heat pump water heater inspections. Most are virtual inspections. This is up from 54 calls in the same month last year.

C) Government Relations

- Highlights for the Trust’s activities related to the Maine Public Utilities Commission (PUC) include:
 - Participated in a case conference for the Section 80 docket that included ISO-NE and considered how an NWA could work with their process and guidelines.
 - Participated in a technical conference for the Section 31 docket answering questions on the Trust’s contribution to the benefit cost analysis and proposal for a 2MW/4MWh battery.
 - Monitored investigations into rate design, and a power to gas pilot.

2. Program Highlights¹

A) C&I Prescriptive (CIP) Program

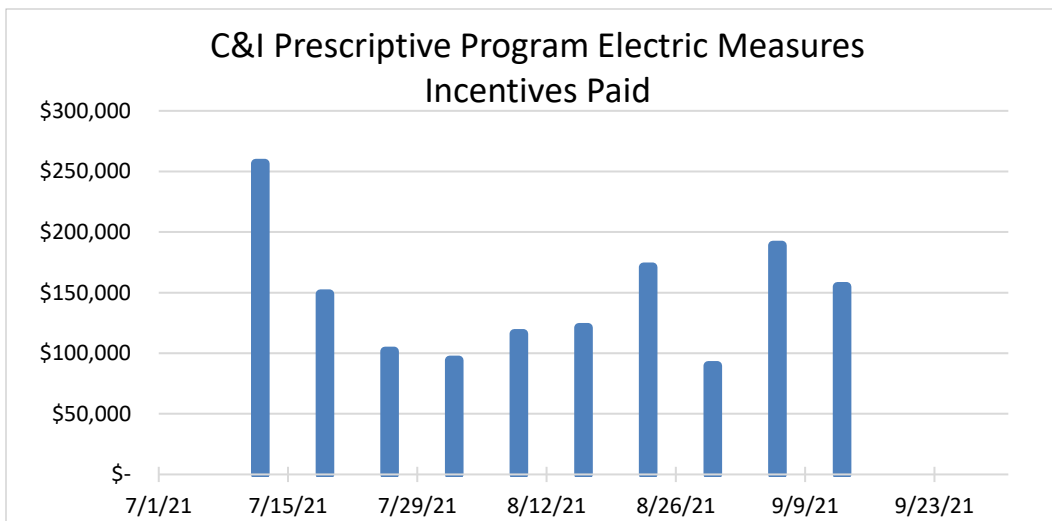
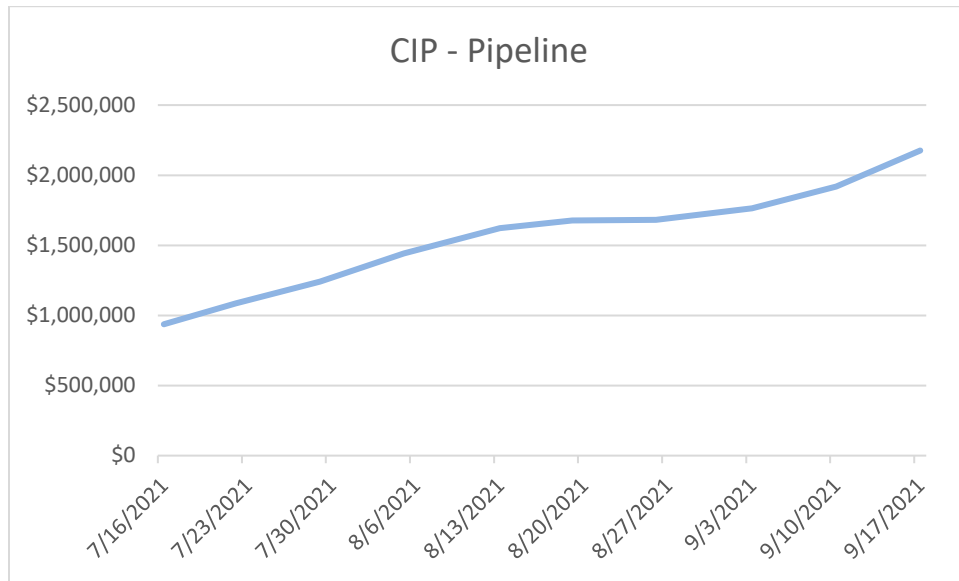
- The FY2021 pipeline continues to decrease and currently has \$3.1M remaining in committed projects. Since the start of FY2022, new project commitments are steadily growing and currently at \$1.6M. Breakdown by funding:

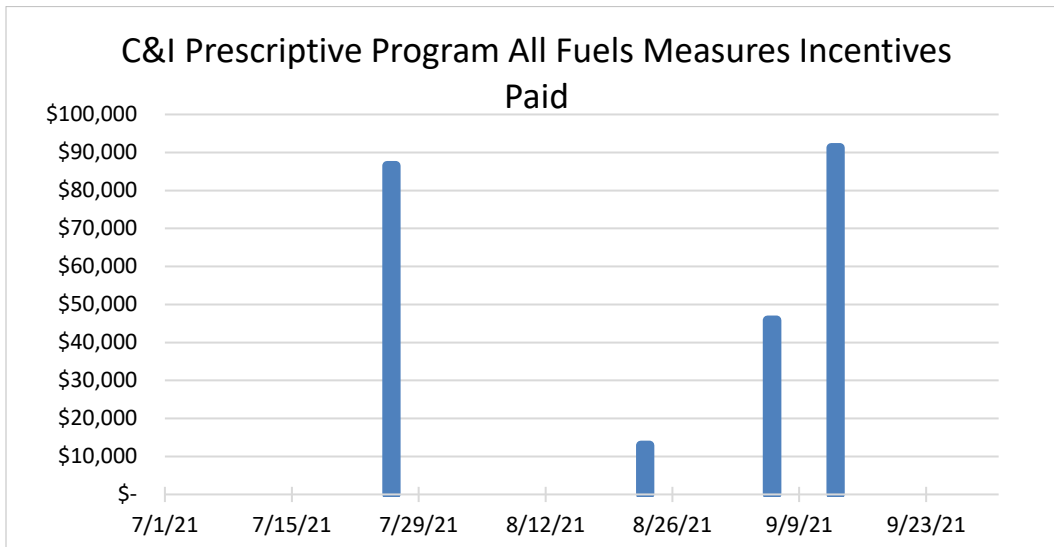
Funding	FY2021	FY2022
Electric	\$2,080,000	\$1,310,000
RGGI	\$ 841,300	\$ 126,440
Natural Gas	\$ 246,800	\$ 234,500

- Funding Opportunity Notice (FON) updates:
 - The Hospitality FON was an opportunity for businesses in Maine’s hospitality industry (restaurants, hotels, motels, etc.) to participate in enhanced lighting, HVAC and refrigeration incentives. The FON received 12 projects for \$176,000 in incentives with a combination of lighting, heat pumps and packaged terminal heat pump measures. \$90,000 in incentives have been paid to date
 - The Service Station FON launched on September 1st, 2021. This opportunity targets service stations with retail operations for enhanced incentives on energy saving upgrades.
 - Eligible measures include LED lighting, heat pumps, variable refrigerant flow systems, energy recovery ventilators, and refrigeration upgrades.
 - Applications will be accepted through January 31, 2022, with an installation completion deadline of May 1, 2022.
 - The CIP Team is planning to launch a new FON targeting Long-Term Care Facilities (LTC) in October with a roll-out presentation during the Maine Health Care Association Fall Conference. This opportunity will offer enhanced incentives for lighting, refrigeration equipment, heat pumps, variable refrigerant flow systems, and energy recovery ventilators in nursing homes, assisted living facilities, and continuing care communities.
- An HVAC Advisory group kicked off in mid-September with a goal to explore strategies to accelerate high performance heat pump and variable refrigerant flow systems in commercial installations. Ideas generated by the group should lead to a better understanding of barriers and lead to new opportunities for participation.

¹ 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 September 24, 2021, to capture the progress for the year through the most recent complete month of reported actual results (i.e., through the end of August 2021).

- The Delivery Team was assigned a total of 57 inspections over the last month, with a combination of virtual inspections and on-site inspections.
 - The virtual inspection platform is now being utilized by all members of the team and is intended to assist with inspections and compliment onsite visits.





No FY22 CIP Natural Gas Incentives have been paid through 8/31/2021

Updated Financials	Program Investment
FY2022 Program Budget	\$15,140,878
7/1 to 8/31 Spending	\$1,293,714
Percent of Budget Spent to Date	9%
Percent of Year Passed	17%

Additional Details on FY2022 Financials	Program Investment
Expenditures	\$1,293,714
Committed Pipeline	\$2,176,015
Total (Expenditures and Committed Pipeline)	\$3,469,729
Percent of Current Budget	23%

Energy Savings (through 8/31)	Annual kWh Savings	Annual MMBtu Savings*
Electric Programs	2,607,398	3,537
Thermal Programs	-	-

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

Project Type (through 8/31)	Projects
Prescriptive Lighting Solutions	132
Electric Heating and Cooling Solutions	164
Compressed Air Solutions and Other	13
Natural Gas Heating and Cooling Solutions	0
All Fuels Heating and Cooling Solutions	0

B) C&I Custom Program

- The C&I Custom Program Review Team met twice and approved 11 projects worth \$461,015 in incentive offers.
- The Program added 8 new projects to the pipeline, 5 of which were approved in the same period. The total pipeline now consists of 7 projects worth \$351,102 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 1 project proposal that did not meet the program requirements and will not proceed further in the process.
- The Program transitioned a subset of cannabis lighting measures to the C&I Prescriptive Program effective September 1.

Updated Financials	Program Investment
FY2022 Program Budget	\$6,035,521
7/1 to 8/31 Spending	\$196,638
Percent of Budget Spent to Date	3%
Percent of Year Passed	17%
Additional Details on FY2022 Financials	Program Investment
Expenditures	\$196,638
Committed	\$6,391,061
Pipeline	\$351,102
Total (Expenditures, Committed and Pipeline)	\$6,938,802
Percent of Current Budget*	115%

**Note: the current budget does not yet reflect the addition of FY2021 carryforward funds for committed projects*

Energy Savings (through 8/31)	Annual kWh Savings	Annual MMBtu Savings
Electric Programs	66,103	-
Thermal Programs	-	-

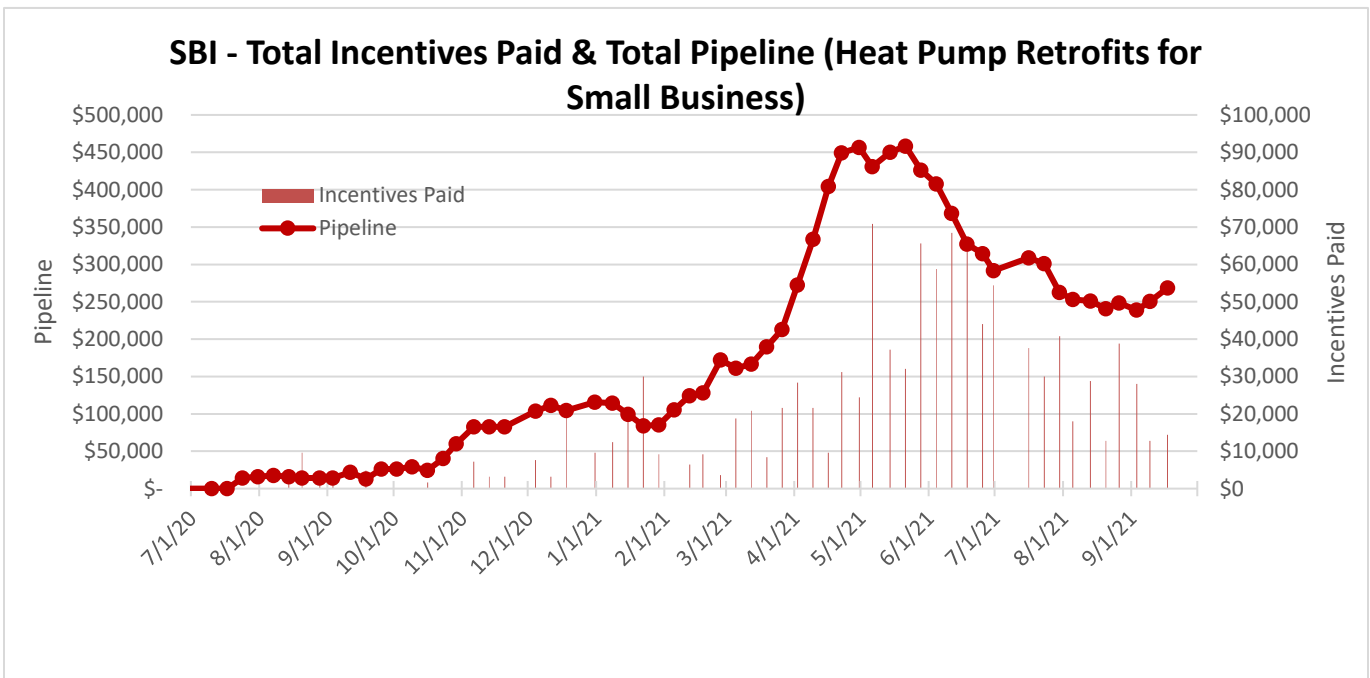
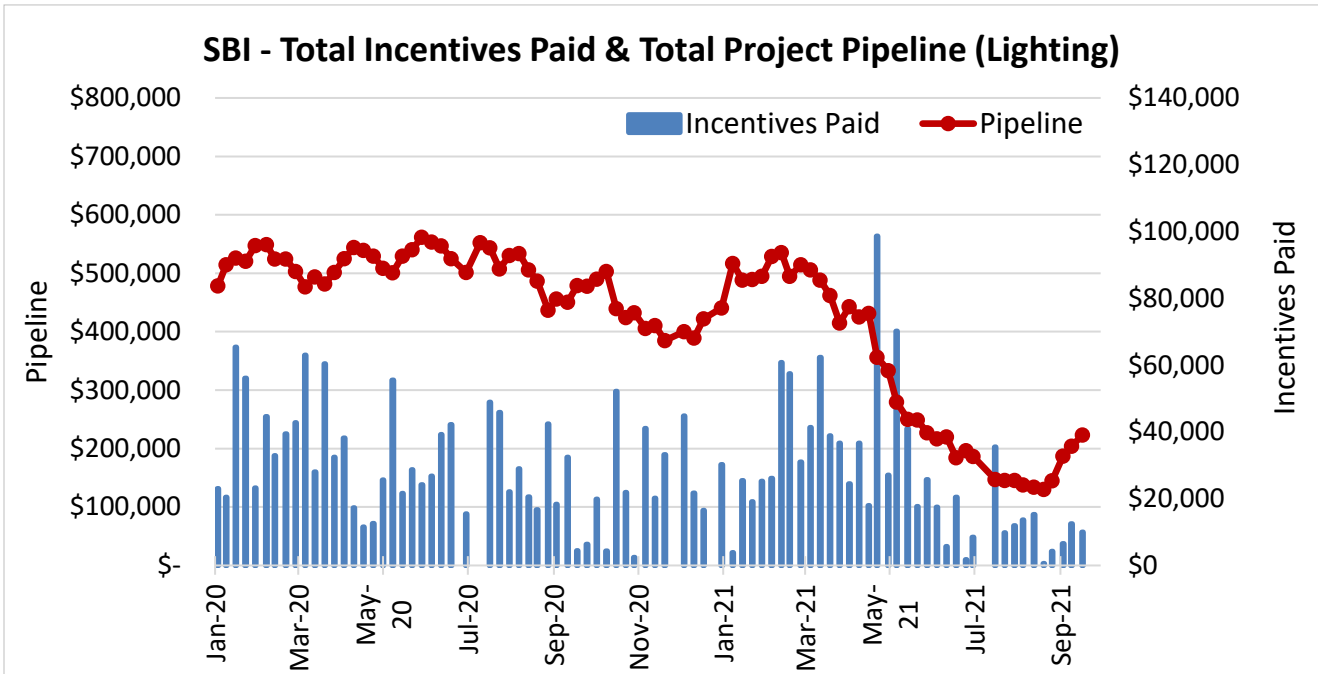
C) Small Business Initiative (SBI)

- Regions 20 (Bucksport Area), 21 (Belfast Area), and 22 (Belgrade Lakes Area) were launched late August/September 2020. The small businesses in these regions now have through September 30th, 2021 to request a lighting or heat pump assessment, then the program team will begin the closeout process for the regions. Overall activity in these regions has been slow the past several months. The program team continued in-person targeted customer outreach this month to help boost activity. Approximately 146 small businesses in these regions were visited. Information was left with business representatives for consideration when the owner/decision maker was not readily available. A total of 14 small businesses requested lighting assessments, and some businesses showed interest in heat pumps. Other potential leads remain in progress. The program team will wrap up the remaining customer outreach efforts next month.

- Region 23 (Lewiston/Auburn) was launched in January 2021. Nine contractors have signed on to participate. Activity in this region has been slow with few responses to the first two mailers that were sent to eligible businesses. Customer outreach efforts by the program team to date have included a call campaign. In-person targeted customer outreach planning is now underway and is anticipated to commence next month.
- Region 24 (Biddeford/Saco) was launched in July 2021. Four contractors have signed on to participate so far. One project in the region has been assessed and pre-approved. Introductory emails were sent last month & this month to eligible small businesses in the region (with email addresses available from the utility) notifying them of the program. In addition, an introductory letter was recently mailed to targeted customers this month.
- Region 25 (Winter Harbor to Machias and the Route 9 Corridor) was launched in August 2021. Seven contractors have signed on to participate so far. An introductory mailer was sent to eligible businesses in the region this month. Participating Contractors, with support from Gilman, have brought in several of their own customers into the initiative this month. A total of 19 projects have been pre-approved for small businesses in this region to date.
- Region 26 (Brunswick/Topsham Area) and Region 27 (Bath Area) were launched this month. A contractor informational webinar was held on September 10, 2021. The program team is currently working on getting Qualified Partners signed on to participate.
- Region 28 (Camden/Wiscasset Area) is also being launched now. A contractor informational webinar was held on September 21, 2021.
- Promotional coupons were sent to small businesses in targeted regions who completed lighting projects through SBI in the past (referred to as SBI “Grads”). To date, coupons for an additional \$400 off an eligible heat pump system (up to 3 systems max, an additional \$1,200 total) have been sent to SBI Grads in the regions listed below.
 - Regions 1 – 4 (Aroostook County areas, Norway area, & Waterville area), coupons expire 12/31/21
 - Region 5 (Lakes Region – the Bridgton/Fryeburg area), coupons expired 8/31/21
 - Region 6 (Mountains Region – the Bethel/Farmington/Skowhegan area), coupons expired 8/31/21
 - Region 7 (Sanford/Berwicks Region), coupons expired 8/31/21
 - Region 8 (Route 25 Corridor, Gorham and west), coupons expired 8/31/21
 - Region 9 (Windham/Gray/New Gloucester), coupons expired 8/31/21
 - Region 16 (Calais-Lubec Region), coupons expired 8/31/21
- SBI Activity by Region:

Running Totals	Region 20 Bucksport Area	Region 21 Belfast Area	Region 22 Belgrade Lakes Area	Region 23 Lewiston/ Auburn	Region 24 Biddeford/ Saco	Region 25 Machias/ Route 9
Region Launch Date	Aug-20	Sep-20	Sep-20	Jan-21	Jul-21	Aug-21
# of Participating Lighting Contractors	22	17	13	9	4	7
Lighting Assessments Requested/Assigned	59	84	79	55	1	23
Lighting Assessments Completed	54	74	70	45	1	19
Pre-approved Projects	47	58	58	38	1	19

Signed SOWs	42	46	46	32	0	1
Lighting Installations Underway	1	6	3	10	0	1
Lighting Projects Completed & Paid	36	37	41	19	0	0



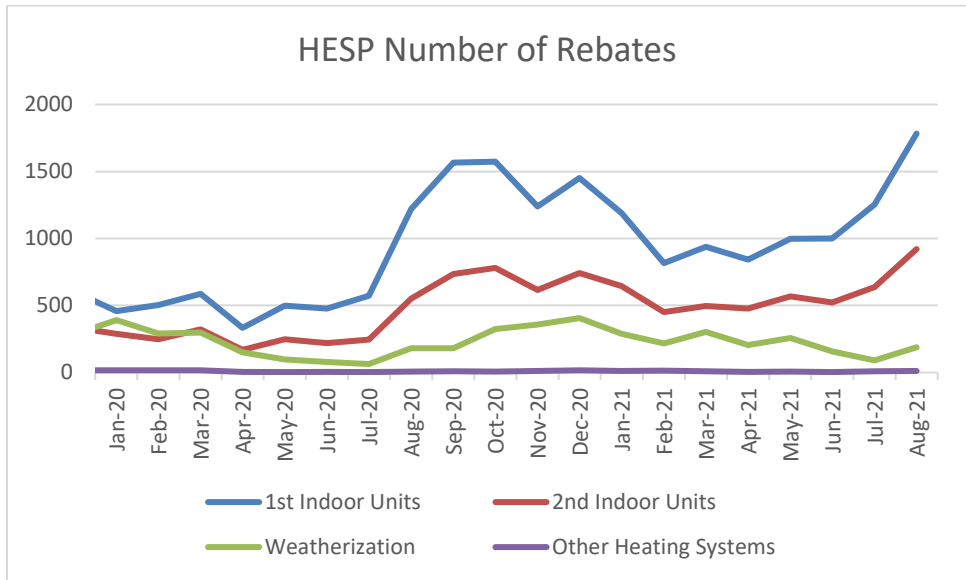
Updated Financials	Program Investment
FY2022 Program Budget	\$5,092,187
7/1 to 8/31 Spending	\$385,836
Percent of Budget Spent to Date	8%
Percent of Year Passed	17%
Additional Details on FY2022 Financials	Program Investment
Expenditures	\$385,836
Committed Pipeline	\$232,849
Total (Expenditures & Committed Pipeline)	\$618,685
Percent of Current Budget	12%

Energy Savings (through 6/30)	Annual kWh Savings	Annual MMBtu Savings*
Electric Programs	171,050	(122)

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

D) Home Energy Savings Program (HESP)

- Heat pump rebate volumes are up 77% fiscal year-to-date compared to FY2021.
- Weatherization rebates are up 13% fiscal year-to-date compared to FY2021.
- Technical Field Representatives used virtual tools to inspect 8% of rebated heat pumps compared to a goal of 10% to 15%. 88% of customers ranked their overall heat pump experience either a 9 or 10 on a scale of 0-10.
- Recordings of inbound customer call and videos of home inspections continue to be monitored to improve customer service.
- Simplified and more generous rebates were announced for weatherization. Non-low income rebates are now 30% of project cost up to \$3,000 per home.



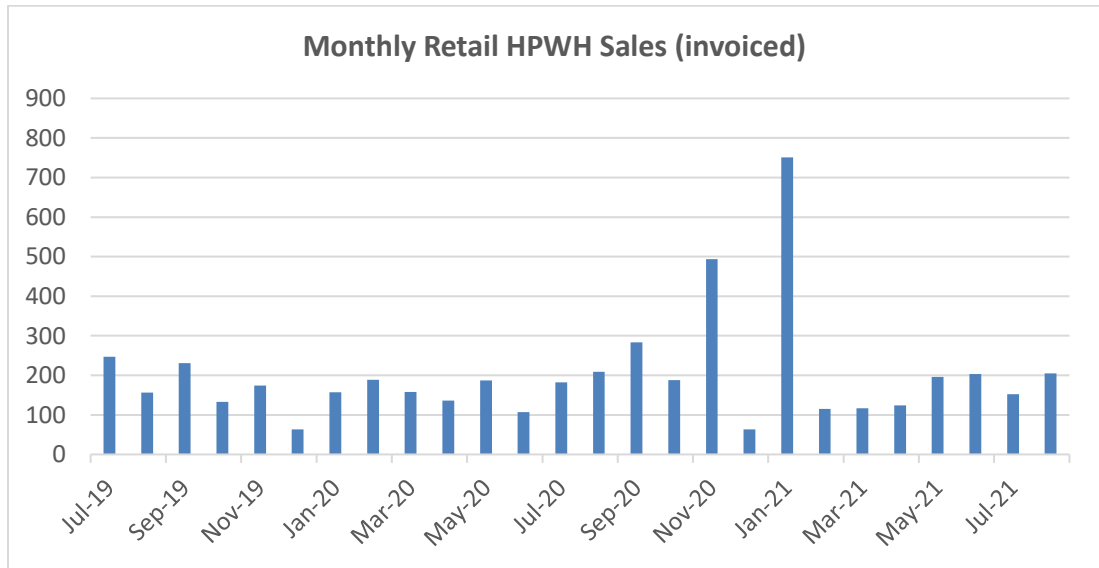
Updated Financials	Program Investment
FY2022 Program Budget	\$18,297,247
7/1 to 8/31 Spending	\$3,253,729
Percent of Budget Spent to Date	18%
Percent of Year Passed	17%

Energy Savings (through 8/31)	Annual kWh Savings	Annual MMBtu Savings
Electric Programs	(1,885,455)	69,238
Thermal Programs	69,773	4,414

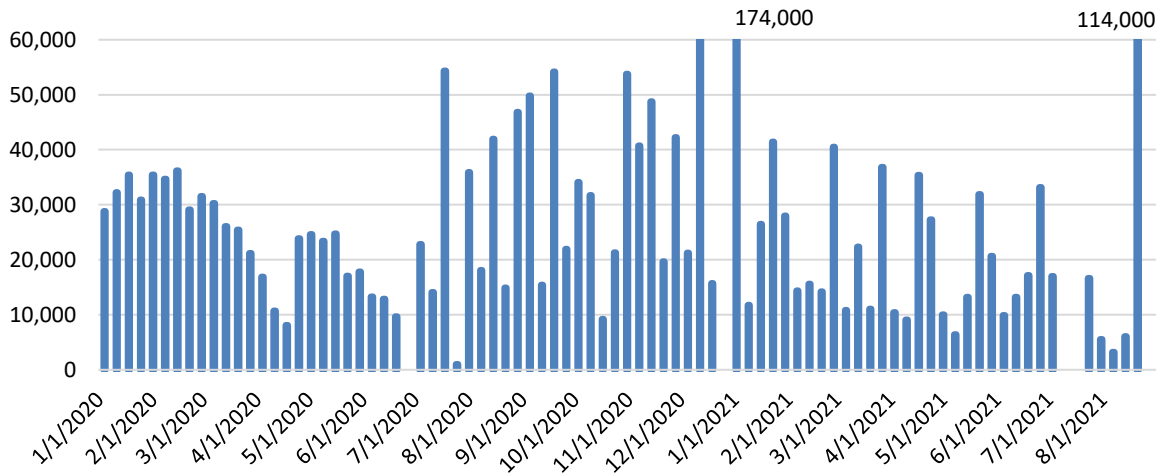
Project Type (through 8/31)	Participating Households
Electric Measures	3,243
All Fuels Measures	172
Natural Gas Measures	-

E) Retail Initiatives Program

- 205 heat pump water heaters were rebated through the rebate program in August, and the full year forecast is for 1,611. This is fewer than FY2021 because Home Depot is not willing to offer the wildly successful instant discount that we piloted in FY2021.
 - Messaging about the \$300 federal tax credit for heat pump water heaters is being rolled out.
 - The field team continues to visit every major retailer and distributor weekly to update signage, train employees, and ensure that shelves are stocked.



Weekly Bulb Sales – Retail (including unaudited estimates)



Updated Financials	Program Investment
FY2022 Program Budget	\$7,154,765
7/1 to 8/31 Spending	\$872,950
Percent of Budget Spent to Date	12%
Percent of Year Passed	17%

Energy Savings (through 8/31)	Annual kWh Savings	Annual MMBtu Savings*
Electric Programs	5,036,471	(3,576)
Thermal Programs	-	-

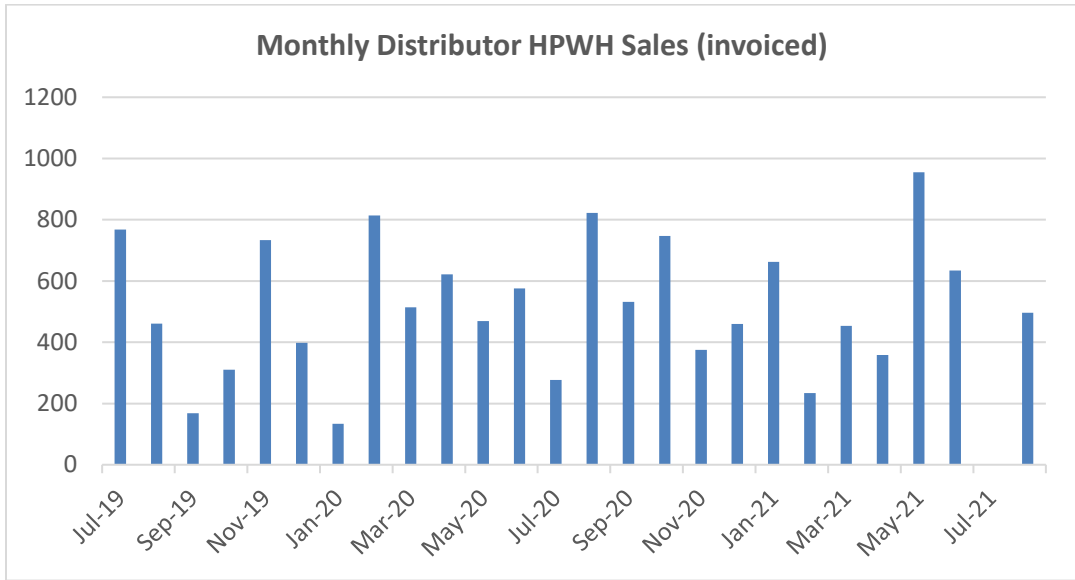
*Negative MMBtu savings indicates thermal interactive effects with lighting measures.

Rebate Type (through 8/31)	Projects
Light Bulbs	145,679
Appliance Rebates	1,244

F) Distributor Initiatives

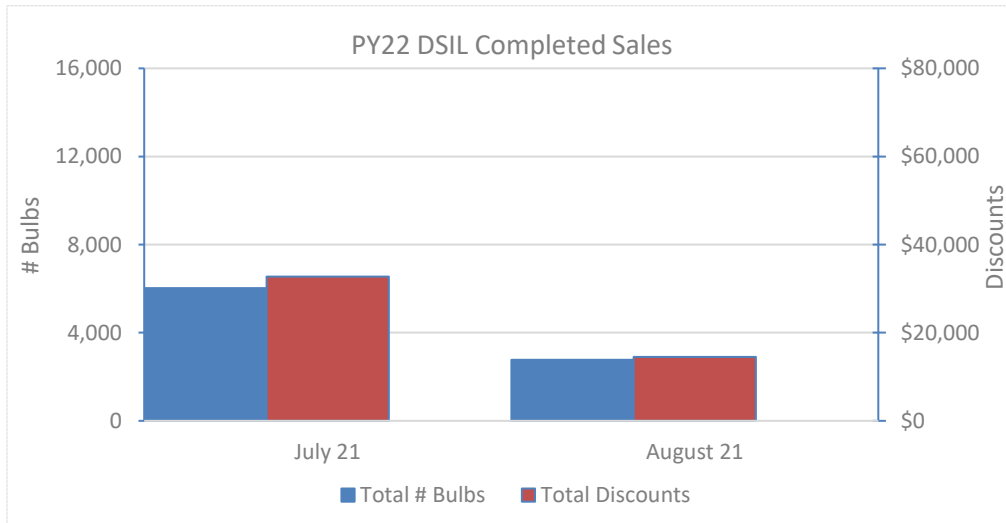
Distributor Non-Lighting

- The pace of distributor heat pump water heater (HPWH) rebates continues to be strong with distributors outselling retailers 4 to 1.
- For August, distributors report that heat pump water heaters constituted 67% of the top-selling electric water heaters. Combined, the Retail and Distributor Programs are on track to rebate over 8,000 heat pump water heaters for the year. This is more than 10% of sales in the United States in 2019 according to ENERGY STAR®.
- Circulator pumps with electronically commutated motor (ECM) technology were 51% of top selling circulator pumps in August. This is up from approximately 40% in the past.



Distributor Lighting

- Following is a summary of the types of bulbs represented in the total volume of lighting sales and discounts paid through the “distributor channel” to date:
 - 8% are screw-bulb (7% of discounts paid); and
 - 92% are mogul and T8, T5, and T5HO linear replacement lamps (93% of discounts paid), there was a slight shift towards more screw-in lamps over the last month.
- The lamp types with the highest volume of sales continue to be 4’ LED linear replacement lamps (82%) followed by T8 U-Bend and PAR38 screw-in lamps.



Updated Financials	Program Investment
FY2022 Program Budget	\$10,184,620
7/1 to 6/30 Spending	\$618,075
Percent of Budget Spent to Date	6%
Percent of Year Passed	17%

Energy Savings (through 8/31)	Annual kWh Savings	Annual MMBtu Savings*
Electric Programs	1,111,533	1,004
Thermal Programs	-	9

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

Rebate Type (through 8/31)	Units	Projects
Distributor Lighting	12,686	-
Distributor HVAC (Oil)	-	-
Distributor HVAC (Electric)	-	56
Distributor HVAC (NG)	-	1
Distributor Hot Water (Electric)	-	300

G) Low Income Initiatives

1) Low Income Direct Mail:

- Since July 1, EMT has sent 1,041 DIY kits of LED bulbs, faucet aerators, and an optional showerhead to low income tenants and homeowners. The Trust has begun to coordinate with DHHS staff for another mailing offer to their clients who have not yet opted in.

2) Low Income Heat Pump Water Heater Initiative:

- To accommodate for increased pricing on heat pump water heaters from distributors, the Trust raised the limit of the reimbursement to accommodate some of that increase. Still, installers are earning less per install than they were in FY21. To date, 110 households were given a new HPWH install at no cost.

3) Arrearage Management Program (AMP):

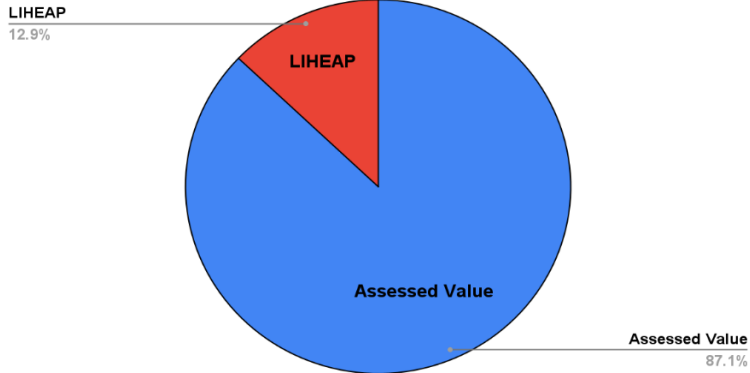
- Since July 1, 2020, the program saw 132 new enrollments into AMP. EMT continues to provide electricity usage assessments, energy-saving tips, and offers for energy-saving devices. Outbound calls are made to households that seem to be a good fit for a heat pump water heater installation.
- Each new enrollee has received an Education Booklet compiled by Efficiency Maine, and borne out of the Low Income Advisory Group meetings. This booklet outlines energy saving tips and will be mailed directly to a participant's home.

4) Low and Moderate Income (LMI) Initiative:

- 22 weatherization projects have been completed since July 1, 2021. In early September, since weatherization measures were chronically behind pace, EMT increased low-and-moderate income weatherization rebates to 90% of the installation cost, up to \$9,000. EMT will prioritize weatherization for the next few years. A residential weatherization marketing campaign is underway.
- Since July 1, EMT has rebated 322 heat pumps to low- and moderate-income homeowners. The pipeline shows 31 reservations. Heat pump installs are on target to invest 100% of allocated funds by fiscal year end. We have begun to invest the NECEC heat pump funds when a home has been heating with propane.

- Eligibility of LMI heat pump and weatherization participation:

LIHEAP vs. Assessed Value



MAXIMUM ASSESSED PROPERTY VALUES FOR LOW- TO MODERATE-INCOME REBATES

\$80,000 Aroostook, Somerset, Washington, and Piscataquis
\$90,000 Franklin, Oxford, and Penobscot
\$100,000 Androscoggin, Kennebec, and Waldo
\$130,000 Sagadahoc, Knox, Hancock, Lincoln, York, and Cumberland

5) Affordable Housing Initiative—Passive House Design Pilot:

- EMT is supporting two New Construction Affordable Housing projects in FY22. These projects have agreed to modify their baseline and build to Passive House. EMT has benefited from the modelling exercises associated with the application process and will gain a better understanding of actual energy use after the builds are complete.

6) Low Income Natural Gas

- The Trust is offering smart thermostats to all interested natural gas customers within eligible LDC territories. EMT will work to parse out which customers are low income.

Updated Financials	Program Investment
FY2022 Program Budget	\$10,428,505
7/1 to 8/31 Spending*	\$941,922
Percent of Budget Spent to Date	9%
Percent of Year Passed	17%

*Total does not include anticipated Affordable Housing Initiative incentives or the pipeline of pending installations for heat pumps and heat pump water heaters.

Energy Savings (through 8/31)	Annual kWh Savings	Annual MMBtu Savings*
Electric Programs	853,507	721
Thermal Programs	(584,661)	7,296

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

Initiative (through 8/31)	Units
Direct Installs	65
Market-based Installs	62

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

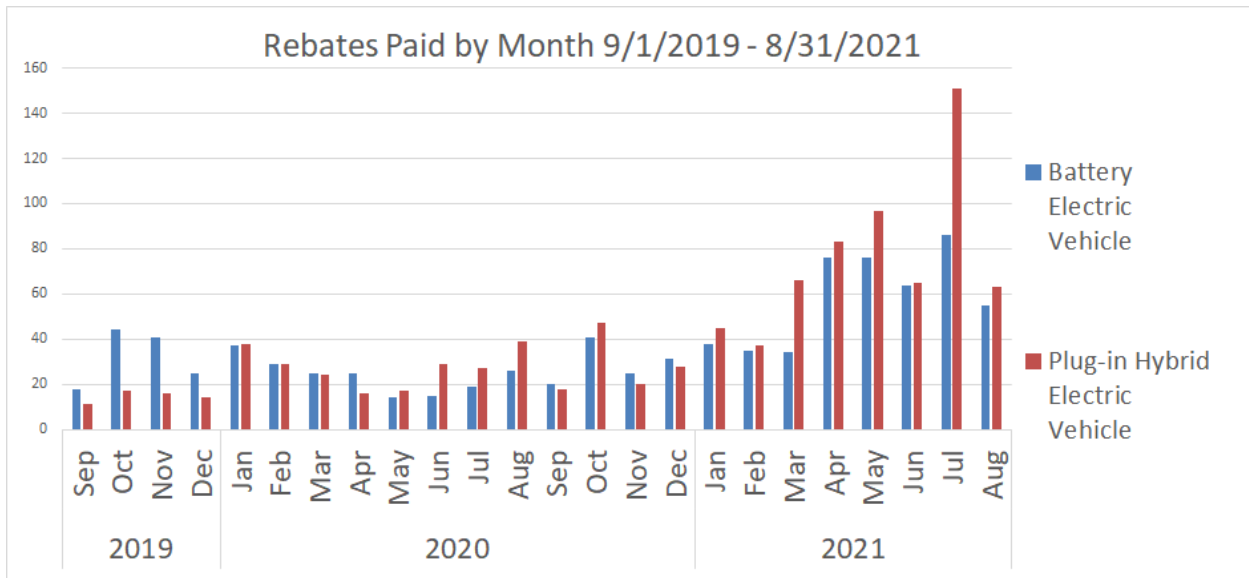
- EMT awarded funds for six Level 2 charging plugs at three Department of Transportation facilities through PON EM-012-2021 for Maine State Government agencies. The chargers will be located at 219 Hogan Road in Bangor, 51 Pleasant Hill Road in Scarborough, and 932 US Rt. 2 in Wilton.

EV Accelerator Rebate Program

- EMT issued 118 EV rebates in the month of June. The top models this month were the Toyota RAV4 Prime, Hyundai Kona, and Toyota Prius Prime.
- EMT added a new dealership to the program, bringing the number of participating dealers to 67.
- Since the launch of a special rebate promotion for governmental entities on December 21, 2020, the Trust has issued 89 rebates to 35 different municipalities, with 13 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, the Times Record, and the Maine Municipal Association's newsletter. EMT ended the promotion on August 31, but governmental entities will still be able to receive rebates above the standard rebate levels.

EV Public Information and Outreach

- Staff released the first in a series of informational videos related to the essential elements of owning and operating an EV, as part of the consumer engagement pilot program awarded by the Maine Public Utilities Commission (PUC) to support beneficial electrification. The first video, called "Ways to Pay" covers the range of methods that drivers can use to pay for public charging. The eight more videos currently in production will be released weekly on social media throughout the months of September and October and will be displayed on a new page on Efficiency Maine's website. Staff are launching a campaign to publicize the videos and draw attention to the benefits and common misconceptions about driving an EV.
- Staff completed production of the first in a series of three "how-to" guidebooks called "How to Select and Install a Home Electric Vehicle Charger". This project is funded by a grant from the Maine Public Utilities Commission (PUC) to support beneficial electrification in the transportation sector. The second and third guidebooks will cover how to charge at home and away and instructions for prospective host sites looking to install EV charging equipment. The first guidebook is being distributed in print at electric vehicle events, through partner organizations, online, and at Maine Bureau of Motor Vehicles branches throughout the state.
- Staff wrapped up the summer radio campaign consisting of public service announcements with a focus on range confidence, the availability of public chargers, and the benefits of EVs. The ads ran on 7 stations in the Portland Radio Group and Townsquare Media, including WBLM, WQCB, and Coast 93.1 through July.



Total Rebates By Technology Type (9/1/2019 – 8/31/2021)	Number of Rebates	Dollars Spent
BEV (Battery Electric Vehicle)	899 (47%)	\$2,676,500 (73%)
PHEV (Plug-in Hybrid Electric Vehicle)	997 (53%)	\$1,010,500 (27%)
Total	1,896	\$3,687,000

Updated Financials	Electric Vehicle Supply Equipment	EV Rebate Program
FY2022 Program Budget	\$4,389,206	\$5,838,761
7/1 to 8/31 Spending	\$-	\$658,382
Percent of Budget Spent to Date	0%	11%
Percent of Year Passed		17%

J) Strategic Initiatives

- Innovation**

- Commercial Battery Storage Pilot:

- The pilot concluded its test year in August. The Trust and Revision Energy are now working to finalize the summary report for publishing.

- Phase Change Material (PCM) Pilot:

- Continued monitoring of data and refinement of load shift plans
 - Analysis of customer billing data conducted to establish a baseline for monetary savings resulting from the installation of the PCM
 - Controls were installed at Vessel Services site
 - Final arrangements were made in preparation of the simulated DR event

- Level 2 (L2) Smart Charging Pilot:

- The Trust completed its second full quarter of its test year and distributed incentives as shown in Table 1.
- To-date, 77% of the 62,566 kWh charged by participants through June 30 occurred off-peak, which is a slight uptick from 75% in Q1.
- In early September, a total of 20 participants (nearly 22% of all participants) were sent emails notifying them that they were being removed from the program due to manufacturer recalls affecting the batteries in all Chevy Bolt and some Hyundai Kona models.

Analysis Quarter	Number of New Stations Activated	Total kWh Charged	Gift Cards Distributed to STOU group	Rebates distributed to STOU group
Q1	68	23,040	9	\$225
Q2	11	39,526	14	\$350
Total	78*	62,566	23	\$575

*One of the original 68 activated stations dropped out of the program, leaving a total of 78 activated chargers to-date.

- Commercial Split System Heat Pump Water Heater:
 - The Trust, in conjunction with Ridgeline Energy Analytics, added College of the Atlantic as a last-minute participant to the project. The addition of COA complete the participant recruitment phase with five sites that have agreed to participate.
 - Equipment is on-site at Atlantic Sea Farms with this likely being the first operational site. Jackson Labs will hopefully follow shortly after. Pinnacle, COA, and Airline have several steps needed before final equipment installation.
- Isle au Haut Pilot:
 - The Trust is working to replace several heat pump heads due to a manufacturing issue and warranty claim with Stash.
 - Ridgeline plans to finalize the installation of metering equipment once the heat pump issue is resolved.
- Integrated Controls:
 - Controls hardware and metering equipment continues to be installed. A solution should be in place for 33 homes before the winter.
- Whole Home Heat Pump Solutions Pilot:
 - The Trust, in collaboration with Ridgeline Energy Analytics, has begun selecting participants to receive a whole home solution to replace a fossil fuel system.
 - Residential Registered Vendors (RRVs) are scheduled to evaluate homes and determine equipment recommendations in October.
- **Evaluation, Measurement & Verification**
 - The Trust has no new information to report this month.

3. Administration and Finance Highlights

A) Administration

- RKO completed its annual audit providing an unqualified opinion, finding no material weaknesses.

B) Financial

Revenues

- The sum of the year's new revenues from state and regional sources through the end of August 2021 was \$19.56 million out of a total expected annual revenue of \$78.40 million. Approximately \$85,000 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 \$0. The total budgeted revenue for FY2022 is \$79.28 million.

Expenditures

- Total expenditures through the end of August 2021 were \$8.73 million of which approximately:
 - i. \$216,000 was spent on Administration (excluding interfund transfers)
 - ii. \$25,000 was spent on Public Information
 - iii. \$198,000 was spent on Evaluation work
 - iv. \$66,000 was spent on Innovation Pilots
 - v. \$942,000 was spent on Low Income Initiatives
 - vi. \$873,000 was spent on the Retail Initiatives Program
 - vii. \$618,000 was spent on the Distributor Initiatives Program
 - viii. \$3.25 million was spent through HESP
 - ix. \$1.29 million was spent through the C&I Prescriptive Program
 - x. \$197,000 was spent on the C&I Custom Program
 - xi. \$386,000 was spent on the Small Business Initiative
 - xii. \$0 was spent in Inter-Agency Transfers
 - xiii. Another \$67.37 million is encumbered across all budget categories but is not yet spent.

Appendix A Full List of Press Coverage (plus links)

- *News Center Maine* aired a segment on September 23 that featured Maine police departments that are transitioning their fleets to electric vehicles using grants from Efficiency Maine (<https://www.newscentermaine.com/video/news/local/police-departments-testing-clean-energy-options-with-electric-vehicles/97-7218e7c5-51f1-4411-bd31-ab4c20497470>).
- The Executive Director is quoted in a September 21 *Spectrum News* article on Portland's Electrify Everything campaign, which aims to reduce the use of fossil fuels through encouraging energy efficiency measures and programs, such as rebates from Efficiency Maine (<https://spectrumlocalnews.com/me/maine/news/2021/09/20/portland-launches--electrify-everything--plan-to-combat-climate-change>). The article was reprinted in *Bangor Daily News* (<https://bangordailynews.com/2021/09/21/news/portland/portland-is-taking-a-major-step-toward-cutting-its-carbon-footprint/>).
- The *Portland Press Herald* describes various residential air and water heating systems in a September 17 primer article that mentions Efficiency Maine rebates (<https://www.pressherald.com/2021/09/17/your-basement-fall-2021/>).
- Efficiency Maine's Small Business Initiative (SBI) for the Biddeford/Saco area was covered in a September 16 article in the *Biddeford-Saco-OOB Courier* (<https://www.pressherald.com/2021/09/16/efficiency-maine-invites-small-businesses-in-the-biddeford-saco-area-to-upgrade-heating-and-lighting/>).
- *Bangor Daily News* reported on September 16 on the use by the Bangor Police Department of its first fully electric vehicle that was leased using Efficiency Maine rebates (<https://bangordailynews.com/2021/09/16/news/bangor/a-new-bangor-police-car-is-piquing-interest-as-the-departments-1st-electric-vehicle/>).
- *WGME TV 13* broadcast a segment on September 14 on Portland's Electrify Everything campaign that aims to reduce the use of fossil fuels through encouraging energy efficiency measures and programs, such as rebates from Efficiency Maine (<https://wgme.com/news/local/portland-has-new-plan-to-help-reduce-use-of-fossil-fuels>). *News Center Maine* also covered this topic (<https://www.newscentermaine.com/article/news/local/as-seen-on-tv/portland-maine-electrify-everything-program-for-renewable-energy-expected-to-launch-2022/97-49d9f84b-f8ec-48d0-9821-ab7cc26360f8>).
- Efficiency Maine's Small Business Initiative for the Brunswick area was covered in a September 14 article in *The Times Record* (<https://www.pressherald.com/2021/09/14/efficiency-maine-invites-small-brunswick-area-businesses-to-upgrade-heating-and-lighting/?rel=related>).
- Efficiency Maine's EV rebates are mentioned in a September 14 opinion piece by a member of York Ready 100% in *Seacoastonline* that calls for the need to reduce carbon emissions in Maine households (<https://www.seacoastonline.com/story/opinion/columns/guest/2021/09/14/getting-ready-fossil-fuel-harms-far-reaching/8275303002/>).
- Efficiency Maine's EV program and rebates are described as part of primer on the types and features of EVs on September 9 in "Our Sustainable City," a recurring column in the *South Portland Sentry* (*Portland Press Herald*) (<https://www.pressherald.com/2021/09/08/our-sustainable-city-plug-in-to-electric-vehicle-market/>).
- *Green Energy Times* covered Efficiency Maine's September 2 announcement that it is extending its EV Accelerator Program for another year using funds from the settlement of the New England Clean Energy Connect (NECEC) project (<https://greenenergytimes.org/efficiency-maine-extends-its-electric-vehicle-accelerator-program-for-another-year-advancing-key-climate-change-objective/>). The press release also appeared in *Bangor Daily News*

[\(https://bangordailynews.com/2021/09/05/bdn-maine/efficiency-maine-extends-its-electric-vehicle-accelerator-program-for-another-year-advancing-key-climate-change-objective/\)](https://bangordailynews.com/2021/09/05/bdn-maine/efficiency-maine-extends-its-electric-vehicle-accelerator-program-for-another-year-advancing-key-climate-change-objective/).

- *GorhamTimes* ran an article on September 2 about eight electric vehicles obtained by the Town of Gorham that, in part, used grants from Efficiency Maine
[\(https://www.gorhamtimes.com/eight-electric-vehicles-for-town-staff/\)](https://www.gorhamtimes.com/eight-electric-vehicles-for-town-staff/).
- *Village Soup / Courier-Gazette* reported on September 1 that the City of Rockland had leased an electric vehicle using Efficiency Maine funds
[\(https://knox.villagesoup.com/2021/09/01/rockland-gets-electric-car/\)](https://knox.villagesoup.com/2021/09/01/rockland-gets-electric-car/).
- *Bangor Daily News* covered Efficiency Maine's September 1 announcement that it is offering a special promotion to service stations with retail operations to upgrade heating, ventilation, and air conditioning (HVAC) systems, LED lighting, and refrigeration equipment
[\(https://bangordailynews.com/2021/09/01/bdn-maine/efficiency-maine-funding-opportunity-invites-service-stations-with-retail-operations-to-step-up-conversions-to-high-efficiency-equipment/\)](https://bangordailynews.com/2021/09/01/bdn-maine/efficiency-maine-funding-opportunity-invites-service-stations-with-retail-operations-to-step-up-conversions-to-high-efficiency-equipment/); Other coverage included:
 - *Green Energy Times* (<https://greenenergytimes.org/efficiency-maine-funding-opportunity-invites-service-stations-with-retail-operations-to-step-up-conversions-to-high-efficiency-equipment/>);
- *WAGM-TV 8* ran a news segment on August 30 featuring the Executive Director commenting on the prospects for expanding EV infrastructure in Aroostook County
[\(https://www.wagmtv.com/2021/08/30/efficiency-maine-eyes-arostook-county-electric-vehicle-charger-projects/\)](https://www.wagmtv.com/2021/08/30/efficiency-maine-eyes-arostook-county-electric-vehicle-charger-projects/).
- Efficiency Maine is mentioned in an August 29 opinion piece in *The Maine Monitor* that describes climate action efforts by various philanthropy groups and state policy leaders
[\(https://www.themainemonitor.org/lending-support-to-climate-action/\)](https://www.themainemonitor.org/lending-support-to-climate-action/). The article was reprinted on September 9 in the *Penobscot Bay Pilot*
<https://www.penbaypilot.com/article/how-group-maine-philanthropists-demonstrates-climate-leadership/151613>).
- *The Ellsworth American* reported on August 18 that the Ellsworth City Council voted to lease two electric vehicles using funds from Efficiency Maine's EV Program
[\(https://www.ellsworthamerican.com/maine-news/city-to-test-electric-cars-upgrades-fleet/\)](https://www.ellsworthamerican.com/maine-news/city-to-test-electric-cars-upgrades-fleet/).
- Coverage of Efficiency Maine's August 17 press release announcing that 60 municipalities benefited from the Small Municipality Funding Opportunity offered with The Nature Conservancy appeared in:
 - *The Piscataquis Observer* (<https://observer-me.com/2021/08/17/news/sixty-municipalities-use-funding-from-efficiency-maine-and-the-nature-conservancy-to-upgrade-lighting-and-heating-systems/>).
 - *Green Energy Times* (<https://greenenergytimes.org/2021/08/17/sixty-municipalities-use-funding-from-efficiency-maine-and-the-nature-conservancy-to-upgrade-lighting-and-heating-systems/>).
- An August 17 editorial in *Seacoastonline* by a member of York Ready for 100% encourages readers to support the state's Climate Action Plan and mentions the positive influence of Efficiency Maine's heating and electric vehicle programs on climate change
[\(https://www.seacoastonline.com/story/opinion/columns/2021/08/17/climate-change-the-only-thing-we-cant-do-wait/8155187002/\)](https://www.seacoastonline.com/story/opinion/columns/2021/08/17/climate-change-the-only-thing-we-cant-do-wait/8155187002/).
- Efficiency Maine is mentioned as a partner of the Maine Energy AmeriCorps Program (MEAP) Window Insulating Insert Program in a brief August 16 Portland Press Herald article about the program's availability
[\(https://www.pressherald.com/2021/08/16/free-insulating-window-inserts-for-qualified-households-in-biddeford/\)](https://www.pressherald.com/2021/08/16/free-insulating-window-inserts-for-qualified-households-in-biddeford/).

- The Executive Director is quoted in an August 5 *Portland Press Herald* article about the potential for Maine to receive \$19 million in federal funds to expand the state’s electric vehicle infrastructure (<https://www.pressherald.com/2021/08/05/infrastructure-deal-includes-1-9-billion-for-maine-transportation-broadband/?rel=related>).
- The Director of Strategic Initiatives was quoted in a July 28 *RTO Insider* article that reports on a new pilot program being designed by Efficiency Maine to install energy storage at critical care facilities (https://www.rtoinsider.com/articles/28289-maine-prepares-statewide-storage-pilot-for-critical-services?utm_medium=email&utm_campaign=Today%20%20RTO%20Insider%2007292021&utm_content=Today%20%20RTO%20Insider%2007292021+CID_c74beded82c365ffbef6d6b33ba78ec8&utm_source=CM&utm_term=Maine%20Prepares%20Statewide%20Storage%20Pilot%20for%20Critical%20Services).
- The *Portland Press Herald* reported on July 28 the dedication of a new EV charger in Lower Village Kennebunk, which was purchased using Efficiency Maine rebates (<https://www.pressherald.com/2021/07/28/electric-vehicle-charging-station-opens-in-lower-village-kennebunk/>).
- The *Courier-Gazette* covered on July 27 the purchase of a 2021 Mustang Mach-E electric vehicle for the Thomaston police department that was supported by Efficiency Maine rebates (<https://knox.villagesoup.com/2021/07/27/thomaston-approves-electric-police-cruiser/>). This article also appeared in the *Camden Herald*.
- A July 26 *NRCM blog* post lists the organization’s top 10 climate accomplishments of the 2021 Maine legislature, including LD 1659, a law that will create a Clean Energy and Sustainability Accelerator at Efficiency Maine “to leverage low-cost, private-sector capital to support clean energy, energy efficiency, clean transportation, and climate resiliency projects” (<https://www.nrcm.org/blog/top-10-climate-accomplishments-2021-maine-legislature/>).
- Efficiency Maine is mentioned as the administrator of a green bank to help finance clean energy measures in an article in the July 25 issue of *The Maine Monitor* that reports on 10 laws passed by the Maine legislature to move its climate change initiatives forward (<https://www.themainemonitor.org/legislature-produces-results-with-work-on-climate-change-initiatives/>). The article also appeared in the July 31 issue of *Penobscot Bay Pilot* (<https://www.penbaypilot.com/article/legislature-produces-results-work-climate-change-initiatives/150044>).
- Efficiency Maine is mentioned in a July 22 article in *Seacoastonline* that reports on the ribbon cutting for a new electric vehicle charging station in Kennebunk's Lower Village (<https://www.seacoastonline.com/story/news/local/2021/07/22/kennebunk-me-celebrates-new-electric-vehicle-charging-station/8055297002/>).

Appendix B

Website Traffic