

# **REQUEST FOR INFORMATION (RFI) ON EFFICIENCY MAINE TRUST TRIENNIAL PLAN VI (FISCAL YEARS 2026-2028)**

The Efficiency Maine Trust (the Trust) seeks preliminary comments from interested parties on implementation strategies, budgets, and metrics for the Trust to consider as it develops its next three-year plan (Triennial Plan VI) for the period spanning fiscal years 2026, 2027, and 2028. These fiscal years run from July 1 through June 30.

Interested parties will also have the opportunity to participate in stakeholder meetings and to submit comments on the draft plan when it is released in summer 2024.

## **SECTION 1 - INFORMATION AND INSTRUCTIONS**

### **1.1 Designated Contact Person**

Michelle Turner, Administrative Secretary  
Efficiency Maine Trust  
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Augusta, ME 04330-6856  
Phone: (207) 213-4150  
Email: mturner@efficiencymaine.com

### **1.2 Key Dates**

RFI Release Date – September 12, 2023  
RFI Comments Due – December 12, 2023

*Note that the Trust plans to post the draft Triennial Plan document online for comment late-spring 2024. The Trust plans to host an online public hearing on the draft document in early-summer 2024. Interested parties will have until mid-summer 2024 to submit final comments on the draft plan.*

### **1.3 How to Submit a Response**

Responses may be emailed to the designated contact person (see section 1.1), or uploaded at <https://www.efficiencymaine.com/triennial-plan-vi/>, by the due date listed in section 1.2. Please find suggested guidelines below:

1. Cover Letter (1 page maximum)

Briefly describe your organization or personal background (for individuals), including relevant qualifications.

2. Response

Address one or more of the questions listed in section 3.2.

3. Appendices

Where helpful, attach relevant reports, published within the past few years, related to topics covered in the response. Please provide URLs where the documents may be accessed online.

Where online access is not possible, please provide electronic copies in the response email or upload.

## **SECTION 2 - BACKGROUND INFORMATION**

### **2.1 The Triennial Plan**

Pursuant to Title 35-A, Section 10104(4) of the Maine Statutes, the Efficiency Maine Trust (the Trust) is directed to develop and approve:

a detailed, triennial plan that includes the quantifiable performance metrics developed under subsection 3 and make a full report of the vote to the commission in accordance with this subsection. The triennial plan must provide integrated planning, program design and implementation strategies for all energy efficiency, alternative energy resources and conservation programs administered by the trust, including but not limited to the electric efficiency and conservation programs under section 10110, the natural gas efficiency and conservation programs under section 10111, the Regional Greenhouse Gas Initiative Trust Fund under section 10109, the Heating Fuels Efficiency and Weatherization Fund under section 10119 and any state or federal funds or publicly directed funds accepted by or allocated to the trust for the purposes of [implementing the Efficiency Maine Trust Act].

Further information about what the statute requires of the Trust and Triennial Plan may be found at [35-A MRSA Section 10104\(4\)](#).

### **2.2 Timeline**

The Plan will be developed by the Staff of the Trust. The Trust expects to publish a draft Plan in late spring/early summer 2024. The Trust will hold a public hearing to deliver an overview of the Plan and receive comments in early summer 2024. The Trust will continue to welcome written comments on the draft through mid-summer 2024. After comments have been considered, the Trust Staff will present a final draft to the Board of Trustees for review and approval. The Trust is aiming to file an approved Triennial Plan at the Maine Public Utilities Commission in September 2024.

## **SECTION 3 - REQUEST FOR INFORMATION**

### **3.1 Triennial Plan VI Program Overview**

Regarding the program designs for the next Triennial Plan, the Trust Staff envisions retaining the same basic portfolio of programs that are offered under the current plan (available at [www.energymaine.com/triennial-plan-v/](http://www.energymaine.com/triennial-plan-v/)). Among the contemplated changes for the program portfolio are expanded financing, beneficial electrification, and demand response offerings.

## 3.2 Questions

At this time, the Trust welcomes written comments and reference materials on any issue relevant to the task of crafting Triennial Plan VI. Analysis of specific topics or advocacy for particular positions should be relevant to the Trust's mission. The Trust particularly invites written responses that address the following specific questions:

1. We are currently planning to deliver and organize our programs in a manner similar to the current approach outlined in [Triennial Plan V](#). What discrete initiatives might we be missing? What alternative approaches to organizing these programs should we consider? What are the most important program aspects that the Plan should maintain and what program elements might we consider changing?
2. Innovation: The Innovation Program is designed to analyze and demonstrate cost-effectiveness of emerging measures that have reached (or are about to reach) commercialization, and to gain a better understanding of what strategies should be employed to promote a measure if it were to be added to the list of eligible measures through the Trust's regularly offered programs. (A) What emerging technologies, operational or behavioral conservation measures, or grid support/load management strategies should we consider for future Innovation Program pilot projects? (B) Historically, the Trust has set the budget for the Innovation Program at either 0.5% or 1% of program budgets. Please comment on the appropriate budget level for the Innovation Program and, where possible, share examples of budget levels used for equivalent initiatives in other jurisdictions to support your recommendation.
3. Public Information and Outreach: As part of its Public Information and Outreach initiative, the Trust maintains an extensive website at [efficiencymaine.com](http://efficiencymaine.com) offering a variety of program descriptions and online tools and videos to help customers select efficient products, locate a vendor, request a rebate, and understand how to operate their efficient products to achieve maximum savings. The Trust hosts training workshops for various trade professionals and occasionally hosts seminars or symposia on topics related to energy conservation and alternative energy. The Trust also provides educational resources and information about efficient equipment directly to Mainers and recent rebate recipients. In what specific ways could we improve these resources and services? What examples from other entities should we consider?
4. Evaluation, Measurement and Verification: In prior Plans, the Trust allocated 2.5% of the program budgets to "EM&V" (Evaluation, Measurement and Verification). EM&V activities encompass systematic data collection and analysis related to the Trust's programs. One type of EM&V activity is third-party evaluations, which are required for every program with annual budgets exceeding \$500,000. Whereas Maine statute requires the Trust to evaluate major programs at least once every five years, the Trust's practice is to initiate these evaluations at least once every three years. Measurement and verification are largely managed by the Trust Staff with assistance from subcontractors. The Trust seeks recommendations on the appropriate amount to budget for this strategic initiative in Triennial Plan VI and the basis for such recommendations.

5. Workforce: Recent reports have assessed Maine’s clean energy and energy efficiency workforce needs, including the [2022 Maine Clean Energy Workforce Analysis](#) report. The Trust has generally focused on specific training needs related to the installation of efficiency measures – for example, the Trust supports industry training for new and experienced heat pump installers through its heat pump basics training module. Please comment on training needs of the energy efficiency workforce. Please also share any recommendations about the approach the Trust’s Plan should take to support workforce training.

6. Equity: The Trust places a priority on advancing equity in the delivery of its programs. For example, geographic equity informs the location and installation of electric vehicle charging infrastructure and municipal incentives. Many of the Trust’s programs or incentives have enhanced incentives for income-eligible households, and others are available only for households that meet certain eligibility criteria. Also, the Trust’s programs meet statutory requirements setting minimum budgets to benefit low-income Mainers. Please comment on how the Trust may continue to prioritize delivering benefits equitably to low-income and other priority communities while also advancing goals of maximizing energy savings, carbon reductions, and market transformation.

7. Demand Management: The Trust launched a Demand Management program as part of the current Triennial Plan. The program consists of two discrete initiatives: (1) a Demand Response Initiative – a traditional demand response program where participants are compensated for reducing their electricity usage when called upon to do so; and (2) a *Load Shifting Initiative* – an initiative focused on using both passive and active load-shifting strategies across fleets of devices. This year, the Load Shifting Initiative will include small batteries and managed electric vehicle (EV) charging. What other technologies or strategies might the Trust consider as part of the Demand Management program in the next Triennial Plan period?

8. Electric Vehicle Initiatives: The Trust’s Electric Vehicle Initiatives focus on speeding the adoption of electric vehicles through the installation of electric vehicle infrastructure and incentivizing the purchase of electric vehicles. The Trust’s infrastructure investments are guided by statewide, collaborative planning efforts through the Recharge Maine initiative Maine EV Charging Infrastructure Plan. Please comment on what additional priorities or strategies the Trust should put in the Plan for transforming the market for electric vehicles?

9. Efficiency Maine Green Bank: The Trust offers a suite of financing offerings for energy projects under one umbrella — the Efficiency Maine Green Bank. Efficiency Maine Green Bank initiatives are, when possible, designed to drive private capital into market gaps for energy efficiency and clean energy equipment and services. In FY2023, these offerings included home energy loans, small business energy loans, commercial property-assessed clean energy, municipal leases, manufactured home heat pump lease, and the Maine Clean Energy and Sustainability Accelerator. As the Trust’s financing offerings continue to expand, what other sectors of the market or technologies might benefit from expanded or alternative forms of financing?

10. Beneficial Electrification: Recent legislation enacted through LD 1724, “An Act to Enact the Beneficial Electrification Policy Act of 2023,” allows the Trust to leverage electric procurement funds for fuel switching measures in certain limited circumstances: where

those measures are cost-effective and would, over the life of the measures, reduce rates. The act directs the Trust to incorporate “beneficial electrification” into its triennial plans and updates. The act also requires the Maine Public Utilities Commission to incorporate beneficial electrification measures into the calculation of electric Maximum Achievable Cost-Effective (MACE) savings and to fund the Trust’s budgets for delivering these savings through electricity utility “procurement” under Sec. 10110(4-A) of Title 35-A, even if the majority of the cost savings come from reduced fossil fuel costs. The Trust will be soliciting feedback on beneficial electrification through an upcoming rulemaking but also invites comments and suggestions through this RFI. Which measures, strategies, and program design elements might the Trust consider as part of incorporating beneficial electrification in Triennial Plans V, VI, and beyond?

### **3.3 Confidential Information**

Respondents should be aware that information received in response to this RFI may be considered in the drafting or implementation of the Triennial Plan and will be posted online and available to the public. Interested parties who claim that certain information is confidential must label relevant sections or pages as “Confidential Information” and request that the Board of Trustees consider such a designation. See [legislature.maine.gov/statutes/35-A/title35-Asec10106.html](https://legislature.maine.gov/statutes/35-A/title35-Asec10106.html) for more information on confidential information.

### **3.4 Disclaimer**

This RFI is not a Request for Proposals (RFP), Request for Qualifications (RFQ), or Program Opportunity Notice (PON). Information submitted in response to this RFI may be considered by the Trust for planning and implementing the Triennial Plan. The Trust does not plan to issue a specific RFP, RFQ, or PON based on or related to responses to this RFI.