



## Joint Committee of the CT EE Board and the Connecticut Green Bank Board of Directors Meeting

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**MEETING DATE: WEDNESDAY, DECEMBER 17, 2025 • 1:30PM**



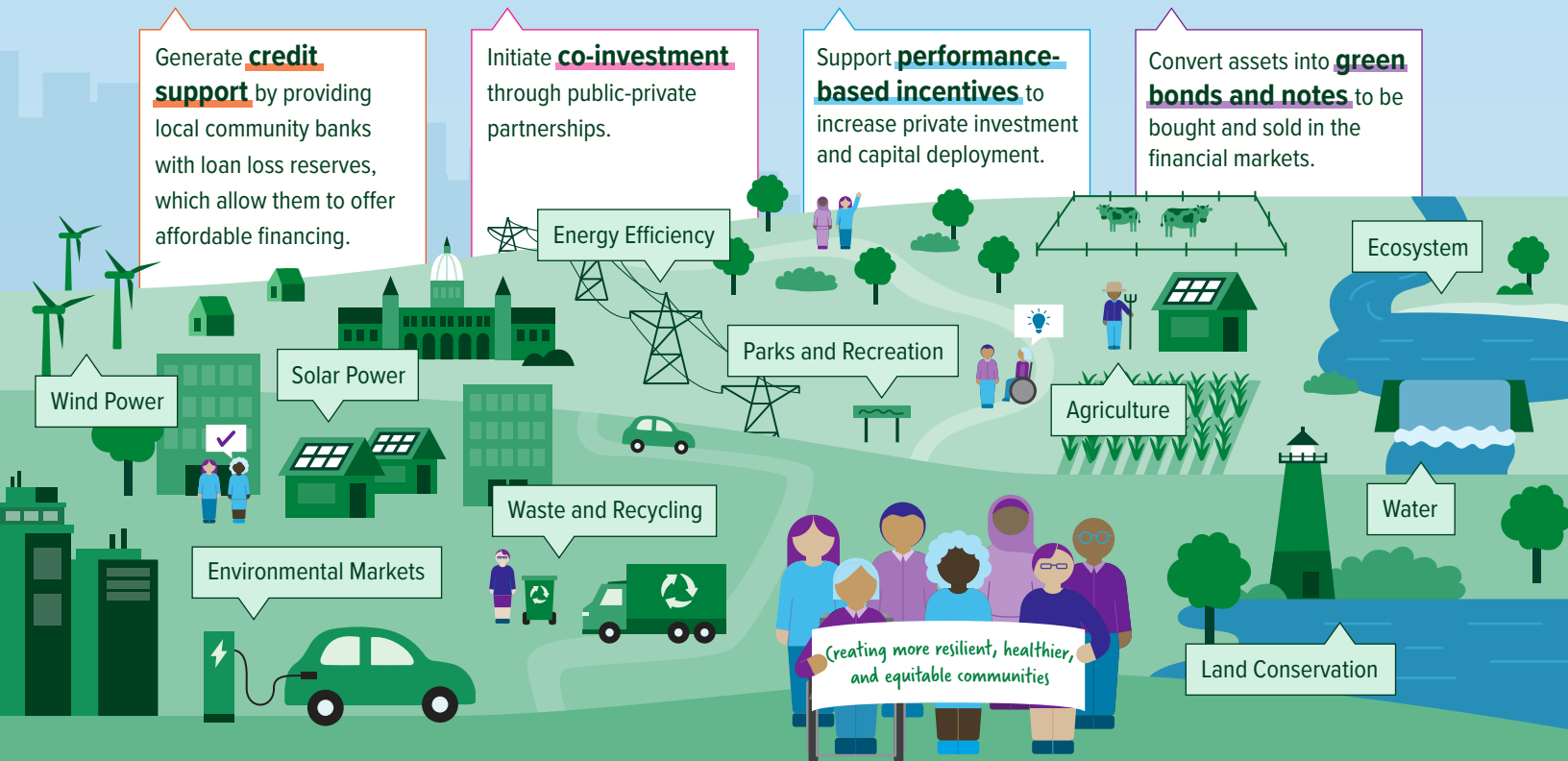
# The Green Bank Model

*A Planet Protected by the Love of Humanity*

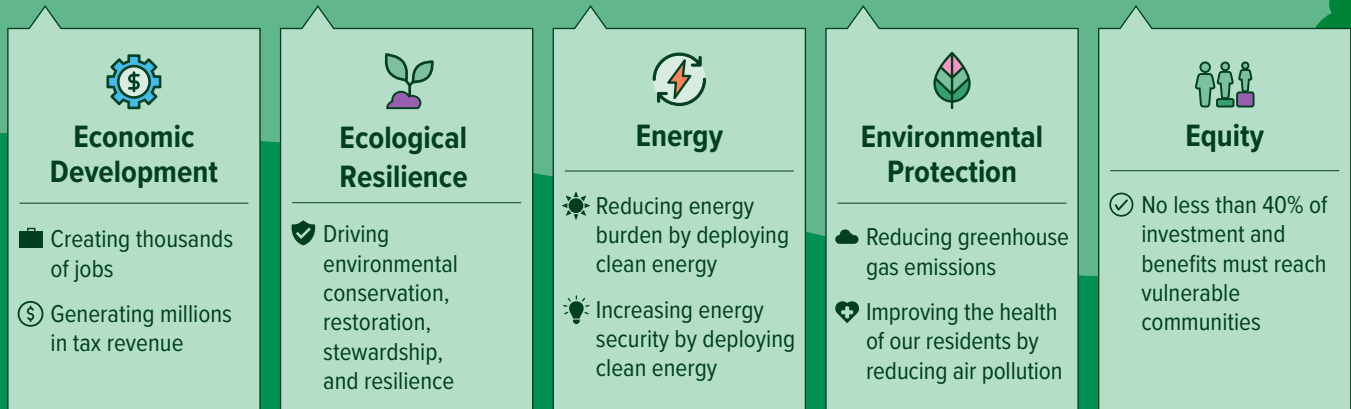
## 1 Attract Private Investment by Leveraging Public Funding



## 2 Apply Innovative Financial Tools to Deploy Investment Towards Our Mission



## 3 Deliver Benefits to Connecticut's Families, Businesses, and Communities



# Societal Impact Report

FY12  
FY25

Since the Connecticut Green Bank's inception through the bipartisan legislation in July 2011, we have mobilized more than **\$3.11 billion of investment** into the State's green economy. To do this, we used **\$463.3 million** in Green Bank dollars to attract **\$2.65 billion** in private investment, a leverage ratio of **\$6.70 for every \$1**. The impact of our deployment of renewable energy and energy efficiency to families, businesses, and our communities is shown in terms of economic development, environmental protection, equity, and energy (data from FY 2012 through FY 2025).\*

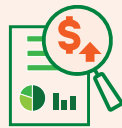
## ECONOMIC DEVELOPMENT

**JOBS** The Green Bank has supported the creation of more than **30,539** direct, indirect, and induced job-years.



### TAX REVENUES

The Green Bank's activities have helped generate an estimated **\$157.9 million** in state tax revenues.



**\$60.6 million**  
individual income tax

**\$60.6 million**  
corporate taxes

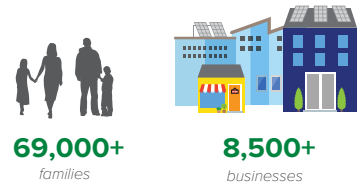
**\$35.4 million**  
sales taxes

**\$1.2 million**  
property taxes

## ENERGY

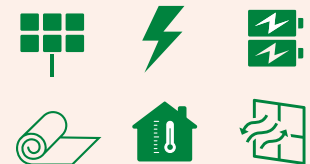
### ENERGY BURDEN

The Green Bank has reduced the energy costs on families, businesses, and our communities.



### DEPLOYMENT

The Green Bank has accelerated the growth of renewable energy to more than **732.2 MW** and lifetime savings of over **93.9 million MMBTUs** through energy efficiency projects.



## ENVIRONMENTAL PROTECTION

**POLLUTION** The Green Bank has helped reduce air emissions that cause climate change and worsen public health, including **7.4 million pounds** of SOx and **9.3 million pounds** of NOx lifetime.



**11.8 MILLION**  
tons of CO<sub>2</sub> :  
**EQUALS**

**178 MILLION**  
tree seedlings  
grown for 10 years

OR

**2.3 MILLION**  
passenger vehicles  
driven for one year

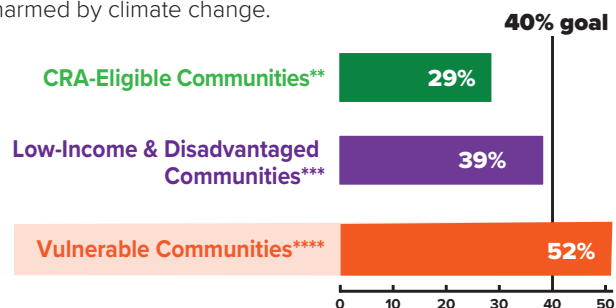
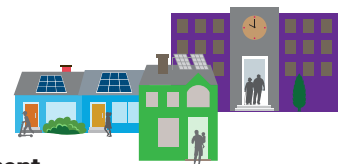
**PUBLIC HEALTH** The Green Bank has improved the lives of families, helping them avoid sick days, hospital visits, and even death.

**\$234.7 – \$530.8 million of lifetime public health value created**



## EQUITY

**INVESTING** in vulnerable communities, The Green Bank has set **goals** to reach **40% investment** in communities that may be disproportionately harmed by climate change.



\*\* Community Reinvestment Act (CRA) Eligible Communities – households at or below 80% of Area Median Income (AMI)

\*\*\* Low-Income and Disadvantaged Communities – those within federal Climate and Economic Justice Screening Tool and Environmental Justice Screening Tool

\*\*\*\* Vulnerable Communities – consistent with the definition of Public Act 20-05, including low- to moderate-income communities (i.e., less than 100% AMI), CRA-eligible communities, and environmental justice communities (e.g., including DECD distressed communities)



\* Includes projects, deployment, and investments approved, but not yet interconnected under Energy Storage Solutions.

Learn more by visiting [ctgreenbank.com/strategy-impact/societal-impact/](https://ctgreenbank.com/strategy-impact/societal-impact/)

Winner of the 2017 Harvard Kennedy School Ash Center Award for Innovation in American Government, the Connecticut Green Bank is the nation's first green bank.

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Sources: Connecticut Green Bank Comprehensive Annual Financial Reports

# Joint Committee of the CT EE Board and the Connecticut Green Bank Board of Directors

Brenda Watson

**E: [bwatson@northhartfordpartnership.org](mailto:bwatson@northhartfordpartnership.org) P: 860-967-2751**

Chair of Joint Committee



Brenda Watson is the newly appointed Executive Director of The North Hartford Partnership, a nonprofit organization dedicated to advancing equitable social and economic development in the North Hartford Promise Zone. The North Hartford Partnership's mission is to collaborate with neighborhood residents in efforts to close health, housing and economic opportunity gaps across North Hartford. Watson was appointed to the Board in February 2020 by Speaker of the House Joe Aresimowicz (D-Berlin/Southington).

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John Harrity

**E: [iamjh@sbcglobal.net](mailto:iamjh@sbcglobal.net)**

**P: 860-459-5381**

Chair of BOC Committee



John Harrity was the former President of the Connecticut State Council of Machinists – the electoral and legislative advocacy organization for more than 10,000 active and retired Machinists Union (IAM) members in Connecticut. The International Association of Machinists represents hourly workers at some of the state's largest industrial employers, including Pratt & Whitney, Hamilton Sundstrand, Electric Boat and Stanley Works, as well as a number of non-industrial worksites.

John is also the Chair of the [Connecticut Roundtable on Climate and Jobs](#).

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Lonnie Reed

Board Chair

**E: [Lonnie.Reed@ctgreenbank.com](mailto:Lonnie.Reed@ctgreenbank.com)**

**P: 203-481-4474**



*Joins on an as needed  
basis for quorum*

Lonnie Reed serves as the Chair of the Green Bank's Board of Directors. Ms. Reed brings significant experience in environmental policy leadership, job creation, and a deep understanding of the climate challenges facing Connecticut. Reed served in the Connecticut State House of Representatives for five terms, from 2009 to 2019, before choosing not to run for reelection. She also served on the Bi-State NY & CT Long Island Sound Committee and helped lead the successful battle to stop Broadwater, a floating liquefied natural gas plant with a 22-mile pipeline proposed for Long Island Sound. Ms. Reed was appointed as Chair in October 2019 by Governor Ned Lamont.

# **Joint Committee of the CT EE Board and the Connecticut Green Bank Board of Directors Meeting Schedule**

Wednesday, March 19th 2025

Thursday, June 18th 2025

Wednesday, September 24th 2025

Wednesday, December 17th 2025

\*all meetings from 1:30pm-3:30pm



## **AGENDA**

### **Joint Committee of the CT Energy Efficiency Board and the Connecticut Green Bank Board of Directors**

#### **Online**

December 17, 2025  
1:30-3:00 p.m.

1. Call to Order
2. Public Comments (5 min)
3. Review and Approval of Minutes for September 24, 2025 (5 min)
4. Joint Committee – Regular Meeting Schedule for 2026 (5 min)
5. Plan Coordination (30 min)
  - a. Input to FY 2026 Connecticut Green Bank Comprehensive Plan (Revisions)
  - b. 2025-2027 Conservation and Load Management Plan (Update)
6. Healthy Housing – Update (30 min)
7. Plans for the 2026 Legislative Session (5 min)
8. Other Business (10 min)
  - a. Brief Update: C&I – Government
  - b. Brief Update: C&I – Small and Medium/Large Business
  - c. Brief Update: Residential – Single Family and Multi-Family
9. Public Comments (5 min)
10. Adjourn

## **Microsoft Teams**

**[Join the meeting now](#)**

Meeting ID: 241 216 321 075

Passcode: EzxeQZ

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## **RESOLUTIONS**

### **Joint Committee of the CT Energy Efficiency Board and the Connecticut Green Bank Board of Directors**

#### **Online**

December 17, 2025  
1:30-3:00 p.m.

1. Call to Order
2. Public Comments (5 min)
3. Review and Approval of Minutes for September 24, 2025 (5 min)

#### **Resolution #1**

Motion to approve the meeting minutes of the Joint Committee for September 24, 2025

4. Joint Committee – Regular Meeting Schedule for 2026 (5 min)

#### **Resolution #2**

Motion to approve the regular meeting schedule for the Joint Committee for 2026

5. Plan Coordination (30 min)
  - a. Input to FY 2026 Connecticut Green Bank Comprehensive Plan (Revisions)
  - b. 2025-2027 Conservation and Load Management Plan (Update)
6. Healthy Housing – Update (30 min)
7. Plans for the 2026 Legislative Session (5 min)
8. Other Business (10 min)
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  - b. Brief Update: C&I – Small and Medium/Large Business
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# **ANNOUNCEMENTS**

- **Mute Microphone** – in order to prevent background noise that disturbs the meeting, if you aren't talking, please mute your microphone or phone.
- **Chat Box** – if you aren't being heard, please use the chat box to raise your hand and ask a question.
- **Recording Meeting** – we continue to record and post the board meetings.
- **State Your Name** – for those talking, please state your name for the record.



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# Joint Committee

Connecticut Energy Efficiency Board and the  
Connecticut Green Bank Board of Directors

Online  
December 17, 2025



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# Agenda Item #1

## Call to Order



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## Agenda Item #2

### Public Comments



# **Agenda Item #3**

## **Approval of Meeting Minutes for September 24, 2025**

# Resolution #1

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## **Resolution #1**

Motion to approve the meeting minutes of the Joint Committee for September 24, 2025



# **Agenda Item #4**

## **Joint Committee**

### **Regular Meeting Schedule for 2026**



# Resolution #2

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## **Resolution #2**

Motion to approve the regular meeting schedule of the Joint Committee for 2026, including:

- March 19
- June 18
- September 17
- December 17

Meetings will take place online from 1:30-3:30 p.m.



# **Agenda Item #5a**

## **FY26 Connecticut Comprehensive Plan (Revisions)**

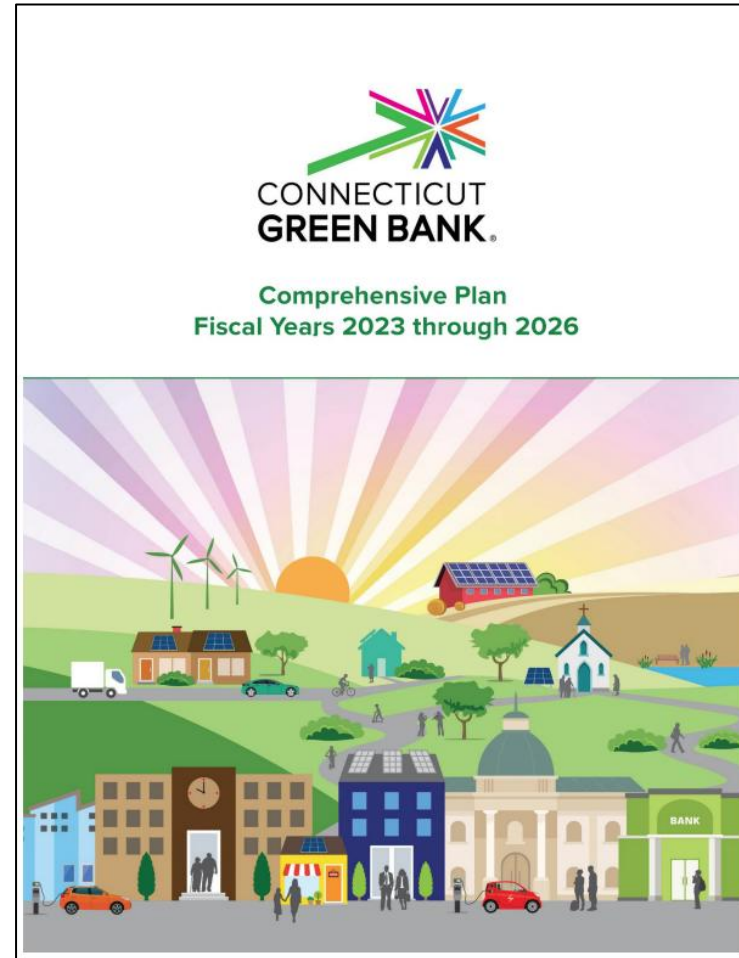
# Connecticut Green Bank Comprehensive Plan – FY26

## ■ Program Implementation

- **Incentive Programs** – continue co-administration of Energy Storage Solutions (“ESS”) with EDCs
- **Financing Programs** – continue implementation of Smart-E Loan, C-PACE, SBEA, and Solar Map+ with focus on RRES MFAH
- **Environmental Infrastructure** – continue to demonstrate financing through C-PACE and Smart-E Loan (e.g., resilience, water), and deliver project through Green Bank Capital Solutions (e.g., Bright Feeds)

## ■ Additional Priorities

- **Electric School Buses** – per PA 22-25, work with DEEP to support deployment of ESBs in EJ communities
- **Resilience** – per PA 25-33, determine technical assistance and financial assistance needs of communities to support RID policy through TIFs
- **Federal Tax Credits** – continue to “safe harbor” solar project portfolio for access to ITC to deliver energy savings benefits to projects as anticipated
- **Community Engagement** - possible “back to the future” with community-based campaigns (e.g., Solarize) and market transformation by community-supported projects (e.g., GLN)





# **Agenda Item #5b**

## **2025-2027 Conservation and Load Management (Update)**

# 2026 Plan Update to 2025-2027 Plan filed

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- Filed Plan Update on 10/31/25
- DEEP held Tech Session on 12/02/25
  - Public discussion regarding HVAC, weatherization, and solar
- Two new performance management goals in development for 2026: (1) renter access to C&LM programs and (2) pairing heat pumps with weatherization

# Update regarding Fall 2025 heat pump special offer, Smart-E Loan interest buy down pilot

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- Companies worked with Green Bank to launch Smart-E Loan IRB pilot for customers who purchase heat pumps
- **Promotional period:** 09/22/25—01/31/2026
- **Interest rates:** 6.99% to 4.99%; 4.99% to 2.99% (low income)
- In Q4 2025, offer lowered to 0.99% financing until 01/31/26
- Promotional terms: 5, 7, and 10 years
- \$500K pilot, \$300K committed as of 12/15/25
  - Total loan amount funded \$1.34M, with the average loan amount being \$27,236
- Green Bank keeps track/post alerts on NGEN as funding runs low

# Pilot Proposal – Joint Offering

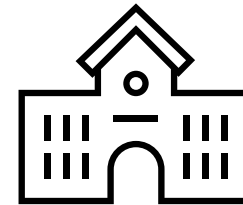
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- **Goal:** Deliver more unified and comprehensive decarbonization audit or technical assistance/scoping study that actively identifies opportunities across four core offerings
- **Budget:** \$200k (\$100k each for residential and C&I) from existing budget
- **Timing:** 2026-2028



Residential

- Comprehensive audit that builds upon existing HES audit and evaluates property for all four core offerings
- Actionable recommendations aligned with relevant utility and state incentive programs, prioritized by impact, cost effectiveness, and ease of implementation
- 10-20 customers
- **Timeline – offer Q1 2026**



C&I

- Enhanced Comprehensive Building Assessment (CBA) engineering study
- Evaluate critical infrastructure elements such as electrical capacity, conduit routing, and the potential need for service upgrades, thereby offering a more robust assessment than a traditional scoping study
- 10 customers
- **Timeline – offer Q1 2026**



# Q1 2026 Efforts Planned



## Education

- **Customer:** Materials explaining interactive benefits of core four offerings
- **Contractor:** Training, annual meetings, cross-program awareness, BPI Total Building Performance certificate
- **Internal:** Formal/informal training, Wise Use hotline, team meetings

## Marketing

- Coordinated marketing to promote cross-program awareness
- Targeted outreach at project start/end
- Community-based campaigns
- Enhanced promotional materials and contractor recommendations

## Operational

- Expanded technical assistance/scoping studies.
- Assignment of jobs to multi-program contractors for customers interested in cross-program projects.
- Proactive vendor identification for multi-program projects.

## Financial

- Investigate higher loan caps (> \$50,000) for comprehensive upgrades
- Collaboration with Green Bank and lenders
- C&I financing: C-PACE, SBEA on-bill financing, municipal bonds
- Lower interest rates for bundled projects



# Energy Efficiency Dashboard Update

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- Launch is creating a data analytics dashboard for Connecticut, leveraging Microsoft Fabric and Power BI to provide a unified, efficient, scalable analytics platform
- Dashboard will enhance transparency in program performance reporting, while aligning with Connecticut's energy savings and greenhouse gas reduction goals
- Project commenced with developing roadmaps/wireframes, creating an intuitive and user-friendly dashboard, and committing to ongoing maintenance and enhancements
- Presently working on data, developing dashboard views, and collecting feedback from stakeholders

# Project Roadmap | 2025-2026 Timeline

## Phase 1 – Project Kickoff and Build Roadmap

Week 1 – Week 8  
May – June 2025

### Actions:

- Internal team kickoff
- Team SOW review
- Soft kickoff with stakeholders

### Deliverables:

- Soft kickoff presentation
- Project risk and decision log
- Project team MS Teams and SP site

### Roles Onboarding:

- Cloud Architect
- Business Analyst

## Phase 2 – Project Execution (Build Dashboards)

Week 9 – Week 32  
July – December 2025

### Action Plan

- Create Dashboards
- Build and test
  - Dashboard development
  - Data sources
  - Upload process
  - Training
- Host - Completed
- Website Development
  - Launch Dashboard

## Phase 3 – Perform Ongoing Maintenance

Week 33 – Ongoing  
January 2026 – Ongoing

### Action Plan

- Ongoing Maintenance
- Maintenance and enhancements
- Monthly status reports
- Hosting



# **Agenda Item #6**

## **Healthy Housing (Update)**

## AMFH Round 1 Portfolio

**Status: Lease & EPC CONTRACTED**

Project Name	Town	System Size kWdc	Awarded EPC Contractor	Estimated Annual Savings per Tenant/Upgrade Amount	Number of Units
Foote Commons	Cheshire	90	PurePoint Energy	\$327	20
Beachport Senior Housing	Cheshire	279	PurePoint Energy	\$492	48
Juniper Hill Village	Storrs	405	PurePoint Energy	\$447,348	100
Federation Square	West Hartford	326	PurePoint Energy	\$391,526	88
Mount Carmel Village	Hamden	105	PurePoint Energy	\$201	40
Congregate Housing	Hamden	238	Earthlight Technologies	\$455,516	30
Tolland Parker Place	Tolland	251	Earthlight Technologies	\$565	37
Hamden Village	Hamden	483	Earthlight Technologies	\$359	110
<b>8 projects</b>		<b>2,178 kW dc</b>		<b>\$363</b>	<b>473</b>

**AMFH Round 2 Portfolio**

**Status: EPC RFP Closed 9/15/2025**

Project Name	City	System Size (kWdc)	# of Tenant Units	Estimated Annual Savings per Tenant/Upgrade Amount
Centerville Village	Hamden	283.60	40	\$449
Ferry Crossing	Old Saybrook	75.24	16	\$364
Herbert T. Clark	Glastonbury	165.00	45	\$261
Highwood Gardens	Hamden	62.60	16	\$79,297
Mark Twain Congregate	Enfield	301.20	82	\$360,108
New Horizon Village	Unionville	1,108.40	90	\$1,198,314
Quarry Heights	Portland	219.00	70	\$217
Rochambeau Apartments	Hartford	171.00	50	\$245
Sarum Village	Salisbury	48.84	34	\$89
St. Martins	New Haven	267.00	63	\$325
<b>10 Projects</b>		<b>2.7 MW dc</b>	<b>506 units</b>	<b>\$279</b>



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# Agenda Item #7

## Plans for the 2026 Legislative Session



# **Agenda Item #8a**

## **Other Business**

### **Brief Update: C&I – Government**

# Parties entered into Fourth Purchasing & Servicing Agreement between Amalgamated Bank, Green Bank, and Eversource in March 2025

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Small Business  
Energy  
Advantage Loans



Business Energy  
Advantage Loans



Municipal Loans

- March 2025: First loan sale, \$4.1M, 109 loans
- June 2025: Second loan sale, \$3.5M, 92 loans
- September 2025: Third loan sale, \$4.4M, 82 loans
- In process December 2025: Fourth loan sale, \$3.5M, 106 loans



## **Agenda Item #8b**

Other Business

Brief Update: C&I – Small and Medium/Large  
Business



## **Agenda Item #8c**

**Other Business**

**Brief Update: Residential – Single Family and  
Multifamily**



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# Agenda Item #9

## Public Comments



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# Agenda Item #10

## Adjourn



## Draft MINUTES

### Joint Committee of the CT Energy Efficiency Board and the Connecticut Green Bank Board of Directors

Wednesday, September 24, 2025  
1:30 – 3:30 pm

#### In Attendance

Voting Members: John Harrity, Melissa Kops, Brenda Watson

Non-Voting Members: Stephen Bruno, Bryan Garcia, Bert Hunter

Members Absent: Kathy Fay, Lonnie Reed, Becca Trietch, John Viglione

Others: Richard Del Soldato, Marriott Dowden, Mackey Dykes, Richard Faesy, Brian Farnen, George Lawrence, Patrick McKenna, Nicole Palermo, Bernard Pelletier, Laura Savidge, Ariel Schneider, Stacy Sherwood, Marissa Westbrook, James Williamson

1. Call to Order
  - Brenda Watson called the meeting to order at 1:31 pm.
2. Public Comments
  - None.
3. Review and approval of Meeting Minutes from the June 18, 2025 meeting.

#### Resolution #1

Motion to approve the meeting minutes of the Joint Committee for June 18, 2025.

**Upon a motion made by John Harrity and seconded by Bernard Pelletier, the Joint Committee voted to approve Resolution 1. None opposed or abstained. Motion approved unanimously.**

4. Healthy Housing
  - a. Connecticut Green Bank Board – Comprehensive Plan Status – Solar MAP+ Affordable Multifamily Housing
    - Mackey Dykes gave an update to the SolarMap+ progress for Affordable Housing, which includes over 2 MW of solar delivering an average amount of \$363 per year to the tenants, and then summarized progress for a few of the specific projects.

- Brenda Watson asked if he could include the number of jobs created or economic impact on the slides for the future. Mackey Dykes agreed that it can be added to future presentations.

- Bernard Pelletier asked for the projects paired with batteries, what the role of the batteries are. Mackey Dykes responded that in some cases the properties are on a residential rate class, where there are no demand charges and therefore no savings opportunities aside from the ESS program, but for resiliency the goal is to be able to provide some resiliency. With the size of the properties, they would not provide full resiliency for days, but a common space or some other compromise to balance the economics of it would be the goal.

- Melissa Kops asked for further clarification about the savings that each customer receives and Mackey Dykes responded by explaining that in the presented chart, it either shows the annual savings per tenant or it's the upgrade amount. If the property is tenant-metered then they will receive a credit from the system, and for master-metered properties the tenant portion of the solar revenue will be used to fund either an upfront upgrade to the building or fund ongoing services for the tenants.

b. Energy Efficiency Board – Conservation and Load Management Plan Status – HES-HESIE Copay and Smart-E Loan IRB

- Marissa Westbrook gave an update to the C&LM Plan timeline and milestones and she highlighted some key, upcoming milestones. She reviewed some of the changes to the Plan to be submitted on October 1, 2025, which includes an overall change in revenues. She explained the driver for the change was a Federal IRA grant that was received and updated estimates and CAM revenue for electric and gas.

- Melissa Kops asked if the budget spending is behind for this year or if it is back on track. Marissa Westbrook responded that the budget is still lagging a bit and explained some of the efforts planned to counteract that. Melissa Kops asked if there is a concern about spending the incoming revenue and Stephen Bruno responded that for Eversource, compared to previous years there is a decrease in participation for heat pumps and weatherization, so those mentioned efforts should help increase demand and that money through the HEAR program should help as well.

- Richard Faesy clarified that the funds have not yet been received but they are being budgeted for.

- Stephen Bruno explained that due to the slower uptake of heat pumps and weatherization, a 0% promotional offer for electric projects was created which was successful in stimulating demand.

- Brenda Watson asked what happens if Eversource doesn't receive the reimbursement from the DOE. Stephen Bruno responded that it isn't a large amount of additional funding and so the focus would be to manage the regular budget.

- Stephen Bruno reviewed the upcoming Smart-E Loan Interest Rate Buydown pilot which is a special offer for heat pumps. The rates will be 6.99% down to 4.99% and for low income customers 4.99% will go down to 2.99%.

- Melissa Kops asked what measures the Smart-E buydown can be used for. Bryan Garcia responded that this buydown is only for heat pumps but the Smart-E Loan covers many measures, including things that are related to health and safety, resilience, and environmental infrastructure. Stephen Bruno added that since the Energy Efficiency Fund is being used for the buydown, the hope is that it will help increase heat pump rebates and uptake from customers. He added that the Green Bank's loan loss reserve process allows for that initial 6.99% which is much lower than the current market rate.

- Richard Faesy commented that contractors are looking for more opportunities to enhance the Smart-E Loan further and suggested some of the Green Bank staff meet with other program staff to brainstorm ideas, such as instant approvals.

## 5. 2025-2027 Conservation & Load Management Plan Update

### a. Performance Management Incentive – Comprehensive Metric

- Stephen Bruno summarized the final DEEP Determination including the background, regulatory context, and working group for the 2025-2027 Plan. He then highlighted existing efforts in marketing, engineering,
  - Brenda Watson asked if there is an effort to market to municipalities so that town councils can begin to think about turning their communities into a Net 0 community. Marissa Westbrook responded that they can leverage a portion of their outreach for that and noted that there is an upcoming small scale pilot that could also be directed towards schools or town buildings.
- Marissa Westbrook reviewed the future planned and coordinated efforts. She explained the pilot proposal that was discussed in the process filing, noting that on the Residential side they would initially target 10-20 customers, and for C&I it would target 10 customers.
  - Brenda Watson asked for the C&I portion if it would include abandoned buildings or would it only include buildings that are operational. Stephen Bruno responded they didn't consider abandoned buildings but it could be brought up to the team.
  - Bernard Pelletier asked if there is a plan for a navigator for the pilot program. Marissa Westbrook responded that one of the ideas was an entity could do an enhanced audit that would act as go-between for all the different end uses. Stephen Bruno added that there would also be a lead for each area but the big concern is cost-recovery, so the goal would make sure the vendors are trained in all the disciplines so that they can make sure they cover all areas. Richard Faesy commented that there are other models for a comprehensive approach and agreed with Bernard Pelletier that is a navigator for the customer, and that it can make all the difference for success. The group discussed the inclusion of a navigator further.
  - Melissa Kops asked if this combined effort will also affect the directive for customers to think about their energy bills and increase savings. Stephen Bruno agreed with Melissa's suggestion to make it ready for future programs.

## 6. Other Business

### a. Brief Update: C&I – Government

- Mackey Dykes reviewed the partnership with Eversource for the SBEA program and summarized the recent progress, which includes the first 2 loans of the fiscal year and the third one is in process.
    - Melissa Kops asked if the program was available to customers who are in UI territory. Mackey Dykes responded that the program is available but the capital is not provided by the Green Bank and Amalgamated Bank. Marissa Westbrook added they do offer on-bill financing through a different funding mechanism and Marriott Dowden noted it is internally funded through Avangrid.
- Bernard Pelletier asked if there is no-cost financing available for commercial customers and why it is not available to Residential customers. Stephen Bruno responded that through an RFP process there were some attractive rates but that the markets have changed, and so for the Residential side it is commonly a 10-year loan which creates financing challenges.

- b. Brief Update: C&I – Small and Medium/Large Business
- c. Brief Update: Residential – Single Family and Multi-Family

- Stephen Bruno explained that all the updates were covered earlier in the presentation.

7. Public Comments

- None.

8. Adjourn

**Brenda Watson adjourned the Joint Committee at 2:32 pm.**

DRAFT





**Joint Committee of the CT Energy Efficiency Board and the  
Connecticut Green Bank Board of Directors**

**REGULAR QUARTERLY MEETING SCHEDULE FOR 2026**

The following is a list of dates and times for **regular meetings** of the Connecticut Green Bank and the Connecticut Energy Efficiency Board through 2026

- **March 19, 2026** – Thursday from 1:30-3:30 p.m.  
Location: TBD
- **June 18, 2026** – Thursday from 1:30-3:30 p.m.  
Location: TBD
- **September 17, 2026** – Thursday from 1:30-3:30 p.m.  
Location: TBD
- **December 17, 2026** – Thursday from 1:30-3:30 p.m.  
Location: TBD

Should a **special meeting** be needed to address other issues that arise, a meeting will be scheduled accordingly.



# Energize Connecticut<sup>SM</sup>

## Coordinated Initiative Plan for Clean Energy

Conservation & Load Management, Electric Vehicle Chargers, Solar Photovoltaic, and Battery Storage

Condition of Approval #3 and Performance Management Incentive Metric, 2025-2027  
Conservation & Load Management Plan

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# Executive Summary

This proposal is presented in fulfillment of the 2025-2027 Conservation and Load Management Plan's (2025-2027 Plan) secondary performance management incentive (PMI) metric requiring the Electric Companies to create a plan to offer residential and commercial and industrial (C&I) customers in Q1 2026 a coordinated initiative that includes four core programs: (1) solar photovoltaic (PV), (2) electric vehicle (EV) chargers, (3) battery storage, and (4) Conservation and Load Management (C&LM) measures.

In response to this, an internal working group, comprising representatives from the Electric and Natural Gas Companies, the Connecticut Green Bank (Green Bank), and Energy Efficiency Board (EEB) Technical Consultants, was formed to explore opportunities to develop a more comprehensive energy offering. The team began by surveying stakeholders to understand current offerings, opportunities, and barriers.

While this initiative aims to further optimize cross-channel coordination, existing marketing efforts and offerings such as Grid-Interactive Efficient Buildings (GEB) and the C&I New Construction/Major Renovation program already integrate C&LM, solar PV, battery storage, and EV charging by providing aggregated information and design support for integrated solutions such as solar, EV charging, active demand response (ADR), and battery storage.

To build on these efforts, the Companies propose a series of enhancements across education, marketing, and operations to increase awareness and engagement. Additionally, a proposed pilot will focus on two programs:

- **Home Energy Solutions (HES).** Enhanced residential audits for 10-20 customers. A more comprehensive audit expanding on HES to assess efficiency, demand response, solar PV, battery storage, and EV charging, along with a phased upgrade roadmap.
- **Commercial & Municipal Energy Assessments.** Deeper engineering studies for up to 10 large C&I customers. An enhanced Comprehensive Building Assessment (CBA) engineering analysis, including electrical capacity, conduit routing, and potential service upgrades. The CBA provides a more robust evaluation than traditional scoping studies.

The primary benefit of this pilot is generating insights to inform a scalable model for broader implementation across residential and C&I sectors, demonstrating a proactive approach to decarbonization, cross-program integration, and improved customer experience. Expected outcomes include:

- Increased customer adoption of comprehensive clean energy solutions.
- Improved coordination across programs and contractors.
- Enhanced customer satisfaction.



# 1. Background

On September 9, 2025, the Department of Energy and Environmental Protection (DEEP) issued its Final Determination with Conditions of Approval regarding the 2025-2027 Plan.<sup>1</sup> In its Condition of Approval #3, the agency instructed the Electric and Natural Gas Companies<sup>2</sup> to continuously track and propose updates to DEEP for review and approval, as needed, to align the C&LM programs with the Public Utilities Regulatory Authority (PURA) dockets regarding distribution system planning and grid modernization actions.

Additionally, DEEP's Final Determination approved the 2025-2027 Plan's new secondary PMI metric.<sup>3</sup> This metric requires the Electric Companies to create a plan (Coordinated Plan)<sup>4</sup> to offer residential and C&I customers in Q1 2026 a coordinated initiative that includes: (1) solar PV, (2) EV chargers,<sup>5</sup> battery storage, and C&LM measures.<sup>6</sup> Collectively, these measures are referred to as the "core four offerings" throughout this Plan document.

## 2. Working Group Creation

The Companies formed a Working Group that included representatives from the Companies, the Connecticut Green Bank (Green Bank), and the Energy Efficiency Board (EEB) Technical Consultants. The Working Group was formed to explore how different energy programs could better interact and support each other to provide more comprehensive offerings for residential and C&I customers. From the Companies' side, the Working Group includes team members from C&LM, EV, solar PV, and Energy Storage Solutions (e.g., battery storage) teams.

Each team presented their respective programs to the wider Working Group, focusing on how customers typically enter the program, whether they currently cross-promote other programs, and where there might be opportunities to do more cross-promotion or integration in the future. The Working Group looked at examples of multi-measure programs from other regions, including Cape Light Compact's [Cape and Vineyard Electrification Offering](#) (CVEO) in Massachusetts and Vermont's

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<sup>1</sup> See DEEP, [Final Determination re: 2025-2027 Plan](#), Sep. 9, 2025 and [2025 Plan Update to the 2025-2027 Plan](#), Feb. 28, 2025.

<sup>2</sup> The "Electric Companies" are The Connecticut Light and Power Company doing business as Eversource Energy (Eversource) and Avangrid subsidiary, The United Illuminating Company (UI). The "Natural Gas Companies" are Avangrid subsidiaries, The Connecticut Natural Gas Corporation (CNG) and The Southern Connecticut Gas Company (SCG), and Yankee Gas Services Company doing business as Eversource.

<sup>3</sup> The exact language of the requirement is as follows "Develop a plan by October 1, 2025 to offer to residential and C&I customers in Q1 2026 a coordinated initiative for solar PV, EV chargers, and battery storage in combination with the C&LM program offerings. The plan shall include details on the benefits, incentives, and financing opportunities along with how the Companies will coordinate with their respective internal teams, the Green Bank, and other state and federal initiatives to encourage the adoption of renewables, storage, and EVs along with energy efficiency upgrades."

<sup>4</sup> It is the Companies' intention to make programmatic updates as required by the appropriate regulatory authority. While the Companies are responsible for implementing the solar program, C&LM programs, battery program (with Green Bank), and the EV charger offerings through PURA's Equitable Modern Grid Framework, various programs are regulated by different entities.

<sup>5</sup> The Companies acknowledge that SB 4/Public Act 25-173 will impact the EV charger program and eligibility criteria.

<sup>6</sup> The C&LM programs offer incentives for a variety of energy efficiency upgrades across residential, multifamily, commercial, industrial, and municipal customers. Common measures include building envelope/weatherization upgrades, appliances, water heating, clean heating and cooling, windows, controls, retro-commissioning, demand response (including EV managed charging), and new construction.

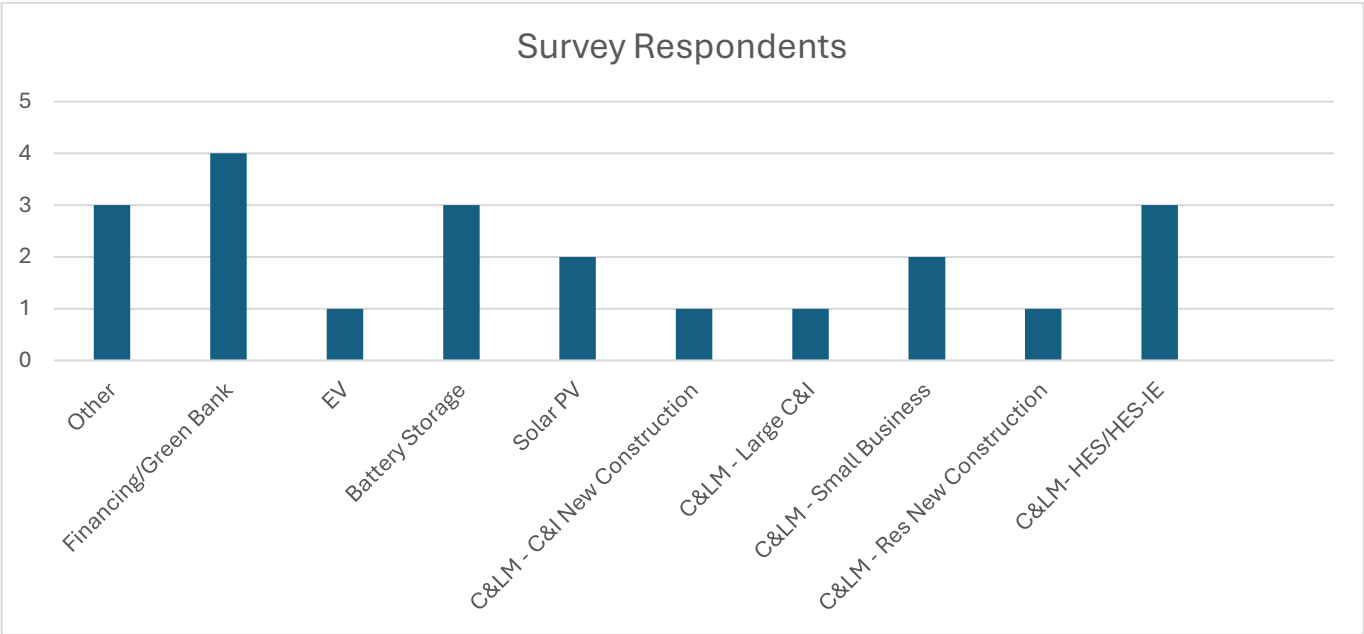
[Zero Energy Now](#) initiative. These examples helped provide useful context and information on how other organizations combine efforts across energy programs.

Starting July 7, 2025, the group began meeting every two weeks and then moved to weekly meetings beginning August 11, 2025, to keep up momentum and dive deeper into the work. Going forward, the Working Group can be reconvened as necessary and appropriate. It may be beneficial for the group to reconvene during the implementation phase of the proposed pilot (further description in subsequent sections) to discuss how the pilot is progressing and whether there are any lessons learned from other jurisdictions that might be helpful and informative to certain aspects of the pilot. The Working Group could also help assign responsibilities for certain aspects of the pilot and monitor progress.

### 3. Preliminary Activities

One of the Working Group’s first activities was to launch an internal survey across its members to better understand people’s opinions on current programs, offerings, opportunities, and barriers to greater integration of offerings and the ability to offer a more comprehensive initiative. Figure 1 shows the 21 total responses<sup>7</sup> to the survey with the distribution of respondents across the focus areas. The following section dives deeper into the survey responses, which were critical in the development of this Plan.

**Figure 1.** Working Group Survey Respondents



When asked if you currently do anything to cross-promote your offerings with other programs, 71% of respondents said “yes” while 29% said “no”. A follow-up question was asked about what

<sup>7</sup> The responses in “Other” indicated that people worked across multiple programs, including ConnectedSolutions. The category “C&LM-HES/HES-IE” includes the Home Energy Solutions<sup>SM</sup> (HES) and Home Energy Solutions—Income Eligible (HES-IE) programs.

cross-promotional activities are currently undertaken. A paraphrased summary of responses is highlighted in Table 1 below.

**Table 1.** Survey Responses on Current Cross-Promotional Activities

Energy Storage Solutions (ESS) and solar PV are frequently cross-promoted, ESS mentioned on Residential Renewable Energy Solutions (RRES) webpage and vice versa
C&LM's HES program is an eligibility requirement for RRES
Ask customers how else we can serve them with other programs
Connect homeowners with Energize Connecticut <sup>SM</sup> programs
Mention other programs in HES leave-behind materials
Direct customers to other contractors in the Connecticut Insulation Installers Network (CTIIN), Heat Pump Installer Network (HPIN), or Advanced Duct Sealing Network (ADSN)
Links on Retail Online Marketplace and Home Energy Reports
Attend events that C&LM representatives also attend
Green Bank promotes HES and HES-IE
C&LM cross-promotion – adding active demand response (ADR) functionality into building management systems, including ADR in Technical Assistance studies, support Account Executives/Energy Efficiency Consultants (AEs/EECs) on ADR opportunities (especially new construction)
Auto ADR enrollment in marketplace
C&LM's all-electric residential new construction and C&I zero-energy new construction program both promote holistic thinking through their design charrettes

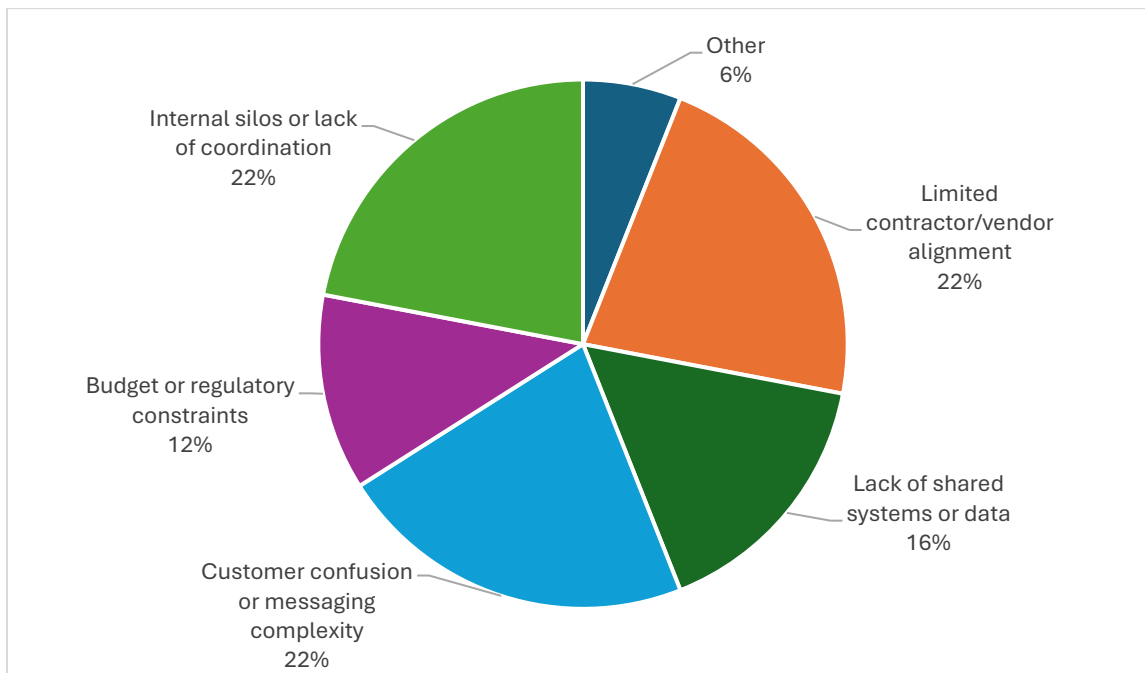
The survey asked the Companies' and Green Bank employees if customers often ask about and/or participate in multiple programs. Approximately 52% of respondents said that customers frequently ask about or participate in other programs, 38% saying customers occasionally ask, and 10% saying that customers rarely or never ask. When asked about how customers are currently referred to or directed between programs, respondents noted that customers are often referred between programs through a variety of informal and formal channels. Contractors who work across multiple programs frequently guide customers toward additional offerings. Company staff including program managers, sales engineers, and account managers, also play a key role in making referrals, often through direct conversations and follow-up emails. In some cases, customers are directed to other programs when they ask or are pointed to online resources for more information.

Some programs have built-in regulatory requirements to cross-promote. For example, both the RRES and ESS programs require an energy assessment. Additionally, C&LM programs are expected to collaborate with other PURA Grid Modernization initiatives as part of DEEP's condition of approval. These requirements help reinforce the need for coordination and are often highlighted in regulatory dockets.

Design charrettes (for new construction projects) and other planning sessions in the C&LM programs also lead to follow-ups where customers are introduced to other relevant programs. Overall, while there are existing pathways for referrals, the need to break down silos within the Companies and improve collaboration across programs remains a consistent theme.

Informal cross program coordination, limited contractor alignment, and customer confusion were all seen as potential barriers to greater coordination with some tension between desire for more coordination vs. availability of staff and resources. Figure 2 shows the barriers most frequently cited by survey respondents to offering a holistic package of multiple measures across different programs.

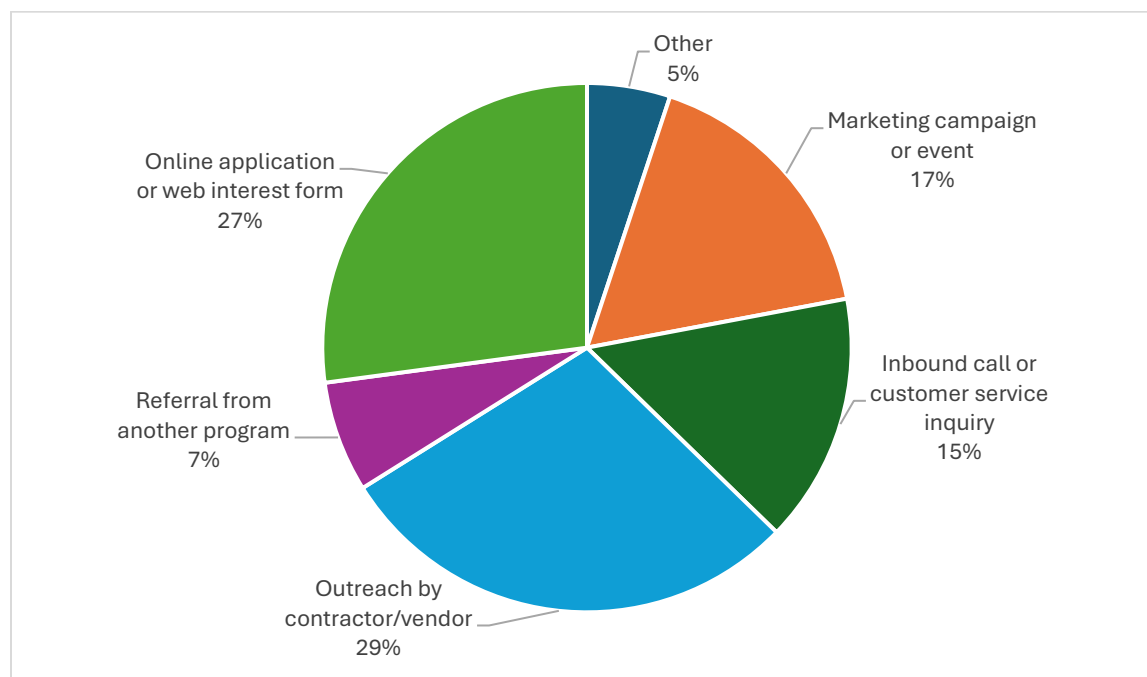
**Figure 2.** Perceived Barriers to Multi-Program Offerings



One area the Working Group aimed to focus on was the initial pathway through which customers enter programs. Gaining a clearer understanding of how customers initially enter programs allowed the Working Group to identify potential intervention points in the customer journey where participation in multiple programs could be encouraged. Figure 3 highlights the ways survey respondents classified how a customer typically enters their specific program.

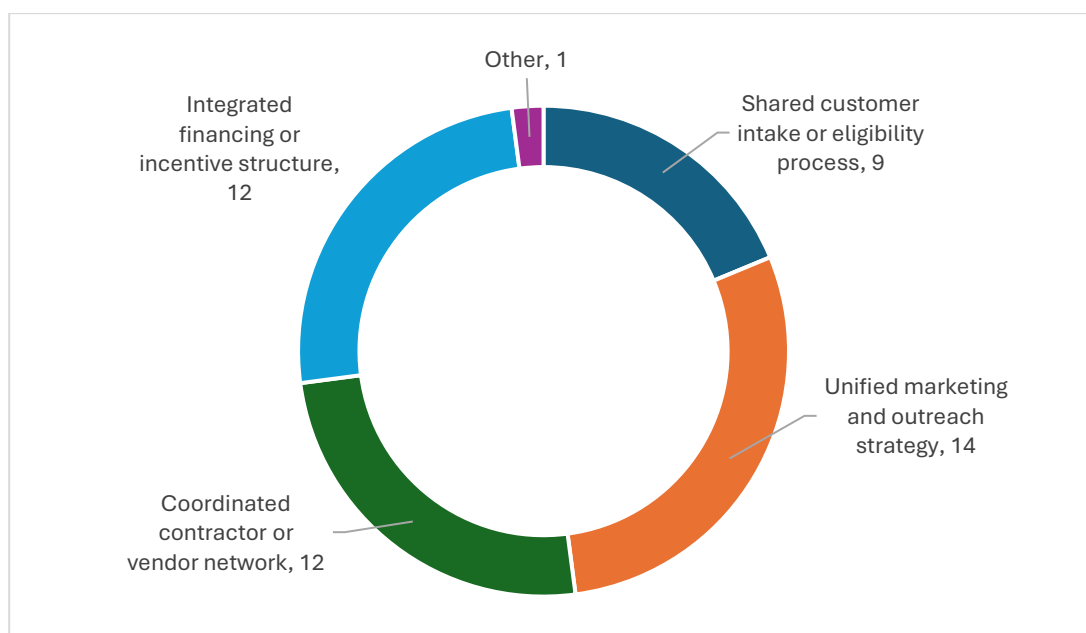


**Figure 3. Common Program Entry Points**



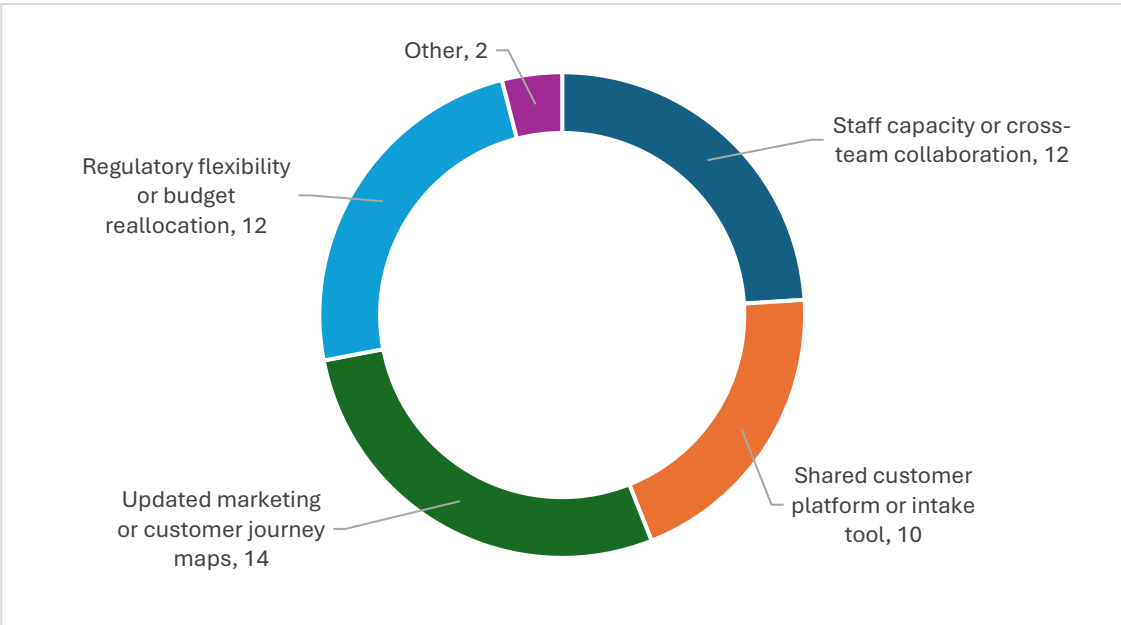
After establishing baseline data and initial impressions of how customers enter programs and the barriers to bundled offerings, the Working Group further explored potential opportunities for integrated offerings in the future. Survey respondents indicated that utilizing contractors, more marketing, and integrated financing solutions were all opportunities for a more comprehensive offering. Figure 4 illustrates the internal programmatic opportunities respondents recognized as possibilities to enable a more holistic, bundled customer offering.

**Figure 4. Opportunities for Integrated Offerings**



To enable a more holistic offering, the survey sought to identify the support and resources necessary for implementation. Respondents noted that additional marketing, more capacity, and regulatory flexibility would be essential to support a combined offering. Figure 5 provides further detail on specific responses, with the “Other” category including suggestions such as contractor training, training and/or incentives for customer service representatives, and cross-team participation in customer kickoff meetings.

**Figure 5.** Resources Needed for a More Coordinated Initiative




Respondents indicated that financing was one of several critical mechanisms that customers use in the various energy programs currently offered. A follow-up question asked if integrating across programs (e.g., a single customer loan for multiple programs/upgrades) would benefit customers. Among respondents, 65% thought that an integrated financial product across programs would be helpful, 30% said they did not know, and 5% said no. This topic was discussed in subsequent Working Group meetings, and it became clear that the group believed that the idea of a single financing offering would be very beneficial.

## 4. Existing Efforts

While the Companies believe there is more to be done to help develop a more coordinated initiative, there are several activities already being undertaken to cross-promote programs and encourage multi-program participation. From a marketing perspective, the Companies’ websites have been updated to cross-promote programs. Eversource has a dedicated webpage to *Decarbonizing Your Home in Connecticut*, which provides an overview of multiple programs that residential

customers can participate in across C&LM, solar PV, battery storage, and EV charging.<sup>8</sup> There are links on each slide in the carousel that provide additional information for each one of the programs.

**Figure 6.** Eversource *Decarbonizing Your Home in Connecticut* website



**What is Electrification?**

Some of the solutions shown here require “electrification” which is replacing oil, propane or natural gas systems and appliances with electric.

It’s important to remember that switching from a fossil fuel source to electric power might cause your electricity bill to increase, but you will see that fossil fuel bill decrease or disappear.

**Start with weatherization**


Air sealing and insulation will help to reduce the amount of energy needed to heat and cool your home by making sure air is not lost to drafts. Start with [Home Energy Solutions](#) and get services valued at \$950 for a \$75 copay.

**Electrifying Your Home**

**Heat Pumps**

Heat pumps are energy-efficient systems that heat in the winter and double as a cooling system in the summer—while lowering greenhouse gas emissions. We offer rebates and incentives up to \$15,000.

[Heat pump rebates and information](#) →



1 of 5

<sup>8</sup> See Eversource [webpage](#).

## Electrifying Your Home

< 2 of 5 >

### Efficient Electric Appliances

When it's time to replace appliances that use gas, look for ENERGY STAR®-certified models that use electricity, like electric clothes dryers, will allow you to use less energy without sacrificing comfort.

[Rebates and incentives on efficient products →](#)



• • • • •

## Electrifying Your Home

< 3 of 5 >

### Heat Pump Water Heaters

Energy-efficient heat pump water heaters use electricity to pull heat from the surrounding air, providing the added benefit of dehumidifying the air around it. See if you qualify for instant discounts from participating retailers.

[Rebates and instant discounts →](#)



• • • • •

## Electrifying Your Home

< 4 of 5 >

### Solar Energy

Generate your own clean energy with rooftop solar panels. This zero-emission energy source produces no pollutants and offers monthly credits and incentives to save on your energy bills.

[Information on solar energy →](#)



• • • • •

### Electric Vehicles

Electrifying by switching to an EV? You can install a home EV charger for convenient, consistent home charging. We offer rebate options to help with the purchase and setup.

[Electric vehicle rebates and information](#) →



The Companies would note that the initial direction in developing the PMI metric was to include EV chargers but as described in footnote 5 above, recent legislation has changed eligibility requirements for EV charger incentives. The new eligibility criteria require that customers must be at 300% of the federal poverty level or live in concentrated poverty census tracts. This leads the Companies to believe that there will be few customers who will be eligible for the EV charger incentives and interested in solar, storage, and C&LM upgrades. However, the Companies will continue to offer managed EV charging programs with associated incentives and will continue to encourage customers to participate in that program.


In addition to the websites, the Companies have also developed marketing collateral that advertises multiple programs such as all-electric New Construction, RRES, and EES. The collateral has links to each one of the programs so customers can easily access additional information or sign up for one of the other programs.



**Figure 7.** Eversource All-Electric Marketing with References to Multiple Programs


## Connecticut All-Electric Residential Opportunities

Whether you're a homeowner or a builder looking for all-electric new construction, solar, or battery storage incentives, Eversource has you covered. Take advantage of attractive rebates and program offerings that make it easier for you to electrify your home or your customer's home.




### ALL-ELECTRIC NEW HOME CONSTRUCTION

All-electric homes use high-performance air source, ground source, or air to water heat pump technologies for heating, cooling and domestic hot water. They feature a super-insulated building envelope to minimize heat loss, leaks and drafts, enhancing occupant comfort and lowering energy bills. By eliminating on-site fossil fuels, all-electric homes operate entirely on electricity, contributing to clean energy usage. Designed for increased comfort and better air quality, all-electric homes reduce energy and maintenance costs and help sustain home value over time. Eversource offers a bonus of up to \$10,000 for building an all-electric home. For more detailed information, visit [eversource.com/new-construction](https://eversource.com/new-construction).



### BATTERY STORAGE

Equipping your house with a battery storage system can help you be more prepared as storms become more frequent. By charging your battery during good weather, you can ensure that essential appliances continue running during power outages. Eversource provides incentives for helping us manage demand on the grid, as well as upfront rebates towards the cost of a home battery storage system, through Energy Storage Solutions. Visit [eversource.com/home-battery](https://eversource.com/home-battery) to learn more.



### RENEWABLE ENERGY SOLUTIONS


With Renewable Energy Solutions, you can sell the power generated by your residential solar installation and any renewable energy certificates (RECs) to Eversource. You can choose from two incentive compensation options on your application: Buy-All and Netting, both designed to provide a similar return on investment. You may also qualify for additional income-based incentives. Visit [eversource.com/solar](https://eversource.com/solar) for more information.

If you're interested in participating in multiple opportunities, please call **877-WISE-USE (877-947-3873)** to speak with an Eversource representative who can guide you through the process.

# EVERSOURCE

3-0423

Proud Sponsor of



Field for by a charge on customer energy bills

The Companies have also been developing a suite of Grid-Interactive Efficient Building (GEB) incentives for C&I customers. This initiative targets new construction and major renovation projects to promote early adoption of electrification and grid interactivity measures. It offers incentives to integrate ADR strategies, solar energy, managed charging, and battery storage from the outset, enabling buildings to optimize energy use, reduce carbon emissions, and generate demand-related revenue while lowering energy costs. The marketing collateral pictured in Figure 8 succinctly describes the existing GEB offering.

**Figure 8.** Joint Marketing Collateral for Grid-Interactive Efficient Building

## Commercial & Industrial New Construction and Major Renovations

### GRID-INTERACTIVE EFFICIENT BUILDINGS INCENTIVES



The Department of Energy created the Grid-Interactive Efficient Buildings (GEBs) initiative to promote decarbonization and facilitate building electrification by increasing demand flexibility without sacrificing comfort or performance. Grid interactivity is the integration of load reduction, shifting, and curtailment strategies that might also work alongside on-site generation.

New construction and major renovation projects are prime candidates for both electrification and grid interactivity measures, especially in early engagement when these measures are least costly, so we have created an offer to help determine where grid interactivity can fit in to your building project. These incentives are meant to inspire the buildings of the future that are ready to integrate a combination of demand response strategies, solar deployment, managed charging capabilities, and energy storage at opening. The most advanced buildings will optimize energy, carbon and cost savings to earn more demand-related revenue streams from your project and achieve cost savings on the demand portion of your energy bills.

#### Technical Assistance

Projects in Paths 1-3 can work with our grid interactivity specialist to learn about measures you can implement to shift or reduce your energy demand. Receive a cost/benefit analysis of measures and implementation assistance.

Eversource will pay 75% of the cost of this technical assistance upfront. Projects can recover their 25% cost share upon enrolling in a demand-related program.

#### Multi-Program Incentive

We are working together with our electrification and demand related teams to ensure your grid interactivity success.

Receive flat incentives for successful enrollment in our other demand-related programs including demand response and battery storage.

Incentive Amounts	
Participation in demand response programs	\$3,000
Participation in battery storage programs	\$3,000
Participation in electric vehicle (EV) programs	\$3,000
<b>Total maximum incentive</b>	<b>\$9,000</b>



Contact us at [CTecb@eversource.com](mailto:CTecb@eversource.com) to learn more.

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Energize Connecticut – programs funded by a charge on customer energy bills. 1-0000 Rev. 07/24

In addition to the GEB offering described above, the C&I New Construction/Major Renovation program offers a design charrette. The charettes are an opportunity to engage with the customer, developer, architect, engineers, and other project team members to go over the core C&LM program offering and to bring other programmatic elements to the table such as solar or EV. For the 11 projects that have chosen the Zero Energy Pathway element of the C&I New Construction program, eight have moved forward with solar and seven are moving forward with EV chargers. These customers have predominantly been municipal customers and have benefitted from early engagement and deep technical assistance from the Companies.



Additionally, Eversource has designed a marketing piece to support its National Accounts strategy by showcasing a state-by-state breakdown of clean energy opportunities across Connecticut, Massachusetts, and New Hampshire. It targets C&I customers with a clear, actionable overview of programs that help reduce energy use and greenhouse gas emissions. The collateral piece highlights multiple pathways for decarbonization, including energy efficiency, EVs, solar, and storage. A key feature of the collateral is a back-page incentive matrix, shown in Figure 9, which allows customers to quickly compare and identify relevant opportunities by state. This format is designed to streamline decision-making and help projects get off the ground faster.

**Figure 9. State by State Incentive Matrix**

Incentives by Statewide Program	Energize Connecticut <sup>SM</sup>	Mass Save <sup>®</sup>	NHSaves <sup>®</sup>
Energy Efficiency Highlights	Let's discuss your opportunities to reduce energy use or decarbonize existing buildings. Optimize or replace equipment with high-efficiency options.		
Enhanced incentives - multiple measures*	✓	✓	✓
Enhanced small business incentives (<200 kW demand)	✓	Most national account locations in MA qualify under Large C&I	✓
HVAC electrification	✓	✓	✓
Supermarkets/food service & EC motors	✓	✓	✓
New construction & major renovations	Get Eversource involved early so we can help review the design to optimize your project's efficiency, lower energy expenses, and help you meet sustainability goals. Incentives available to help cover incremental construction and design service costs.		
Energy efficiency engineering studies	Building assessments are available in all states served.		
Controls			
Building controls - BMS	✓	✓	✓
Active demand response	Through the ConnectedSolutions program, you can leverage your control systems and operational strategies to reduce energy use during periods of peak electricity demand and earn incentives.		
Variable speed drives and motors	✓	✓	✓
Other			
Chillers, cooling plants, HVAC**	✓	✓	✓
Refrigeration	✓	✓	✓
Electric forklifts, chargers	✓	✓	High frequency charging station retrofit support available
Custom/specialized equipment	✓	✓	✓
Other Incentive Programs			
EV Charging and Batteries			
Battery Storage	Energy Storage Solutions – installation and performance incentives available	ConnectedSolutions – performance incentives available	No programs currently available
EV charging infrastructure – public and fleet	Level 2 and DC Fast incentives available	Multifamily program available	No programs currently available
Interconnects and Renewables			
Renewable Credits	✓	✓	No programs currently available

\*Additional incentives may be available for comprehensive projects that incorporate more than one measure or system.

\*\* Connecticut and Massachusetts can no longer incentivize most new fossil fuel equipment. Some exceptions apply.



In addition to the existing marketing efforts described above, the engineering teams have developed new technical study options that are available to C&I customers and frequently span across multiple programs. Figure 10 below shows Eversource’s marketing materials used to promote the Decarbonization Roadmap study.

The Decarbonization Roadmap is a comprehensive engineering analysis designed to support C&I customers in achieving their sustainability goals across multi-building portfolios. This study evaluates a wide range of decarbonization strategies, including energy efficiency improvements, electrification of systems, and integration of renewable energy sources. It also accounts for fleet emissions and the embodied carbon of building materials to provide a holistic view of carbon reduction opportunities. The outcome is a strategic report that outlines actionable pathways for decarbonization, supported by high-level cost estimates, projected energy savings, and a detailed greenhouse gas emissions model. Customers benefit from a long-term carbon reduction strategy and informed investment decisions through cost-benefit analysis. Upon completion of the roadmap, customers are encouraged to meet with program staff to review findings, explore incentive options, and begin project implementation. Up to 50% of the study cost is covered by the Companies when conducted by qualified contractors.

Figure 10. Example of Enhanced Engineering Study



# Strategic Pathway to Net Zero

**The Decarbonization Roadmap** offers a comprehensive, portfolio-wide approach to help you achieve your sustainability goals. Designed for multi-building portfolios, this in-depth analysis identifies energy efficiency, electrification and renewable energy strategies, considering everything from fleet emissions to the embodied carbon of building materials.

**EVERSOURCE**

**Outcome:**  
A strategic report outlining actionable decarbonization pathways, leveraging Energize Connecticut<sup>SM</sup> program incentives and other funding sources as may be available. You'll also receive high-level cost estimates, energy savings projections and a detailed greenhouse gas emissions model.

**Benefits:**

- Long-Term Carbon Reduction Plan:** Get a comprehensive strategy for reducing emissions across your entire building portfolio.
- Informed Decision-Making:** Prioritize investments with clear cost-benefit analyses and future-proof your assets against evolving regulations and ordinances.
- Maximize Incentives:** Take full advantage of Energize Connecticut programs and federal funding to lower the cost of decarbonization.

**Next Steps:**  
Once your roadmap is complete, we suggest meeting with our staff to advise next steps and available incentive programs, and begin project implementation. Reach out to **Commercial@eversource.com** to schedule a meeting.  
eversource.com | energizeCT.com

**Financial Support:**  
Typical costs can vary. The Sponsors of Energize Connecticut, including Eversource, will cover **up to 50%**, subject to applicable funding caps and only when you work with one of our qualified vendors.

Typical investment level  
\$ ————— \$\$\$\$

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Partnering to achieve our common energy goals

While the Companies collaborate with stakeholders to redesign the HES program's Home Energy Reports and leave-behind workbooks (currently called the Print on Demand, or "POD") that accompany HES and HES-IE assessments, the existing leave-behind materials continue to cross-promote other energy programs. The current customer POD provides additional information on financing options available through the Green Bank's Smart-E loan, energy storage options through ESS, smart thermostats through ConnectedSolutions, and renewable energy tariffs for solar PV offered through the RRES program. While previous versions also included details on EV charging offers, the current version does not. As the new HES Home Energy Reports are designed, the Companies will remain committed to the inclusion of information about other complementary energy programs.

## 5. Coordinated Initiative Plan

To advance a coordinated clean energy initiative, the Companies propose a series of enhancements that span existing programs. These include targeted efforts in education, marketing, and operational improvements, each designed to foster greater awareness and engagement. The following sections detail these strategies, which are expected to generate immediate impact and drive increased participation across C&LM offerings, solar, battery storage, and EV charging.

As a foundational step, the Companies are also exploring a pilot program that would be implemented within select existing programs. This pilot would introduce discrete actions aimed at facilitating customer adoption of the four core offerings.

Internal stakeholders have emphasized the importance of integrated financing in supporting these installations. In response, the Companies have been collaborating with the Green Bank to develop a financing product that can cover the higher upfront costs associated with comprehensive decarbonization upgrades.

Lastly, it is important to acknowledge that there is uncertainty at the federal level for funding and support for certain types of projects. This has impacted contractors that operate within these program areas, with several contractors already going out of business or significantly reducing their operations. The Companies will continue to monitor developments in this space and potential impacts to cross-program coordination and the contractor pool available to implement multi-program projects.

### 5a. Education Strategy

To support the success of the comprehensive program strategy, a multi-tiered education initiative will be implemented targeting customers, contractors, and internal staff. The goal is to ensure all stakeholders understand the interactive benefits of the four core offerings and are equipped to promote and implement them effectively.

#### Customer Education

The Companies will continue to develop materials that explain how the four core offerings work together to deliver incremental value and savings. Figures 5 through 9 above represent existing

customer education efforts to date and the Companies can continue to build off these marketing pieces.

In its Massachusetts service territory, Eversource has developed an interactive infographic,<sup>9</sup> shown in Figure 11 below, of a residential home that allows customers to click on different parts of a house to better understand energy-saving opportunities related to that part of the house. The opportunities called out in the infographic include C&LM, solar PV, storage/demand response, and EV charging. The Companies will explore the possibility of replicating this infographic on EnergizeCT.com, providing residential customers with education about opportunities across various programs. The Companies' C&I teams are developing a similar piece of collateral. While currently formatted as a printed piece, this marketing piece could be used for similar purposes.

**Figure 11.** Interactive Infographic Displaying Multi-Program Opportunities



## Contractor Education

The Companies will provide additional training to contractors on all program offerings, enabling them to cross-sell. The Companies hold an annual contractor meeting that includes contractors from across the C&LM programs, with a focus on C&I. As part of the next annual Energize CT business partner event, the Companies intend to invite program representatives and contractors from the solar PV, storage, and EV programs to present. In this manner, it will be possible to educate C&LM contractors about the other programs concurrently, enabling them to cross-promote programs.

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<sup>9</sup> Eversource webpage: [Decarbonizing Your Home](#).

HES and HES-IE contractors meet frequently throughout the year, which presents an opportunity for the Companies to provide additional information on the other core offerings. CET and Abode provide training to contractors that provide HVAC, heat pump, and insulation services. These training courses are an additional opportunity to provide cross-program awareness to residential contractors and vendors.

For the past nine consecutive years, Eversource has hosted an annual Net Zero Conference, establishing it as a tri-state event that convenes a diverse group of stakeholders including customers, developers, architects, engineers, sustainability consultants, municipal and state representatives, and professionals involved in new building design and construction. The conference, which is free to attend and offers recorded sessions at no cost, focuses on commercial and multifamily new construction projects. The 2025 conference achieved record participation with 514 unique attendees. Each year, the conference includes a dedicated programming update segment that highlights available support across multiple cross-cutting initiatives. In addition to the C&I New Construction and Residential New Construction programs, recent conferences have addressed EV offerings, ADR programs, battery storage, and solar PV.

Additional program information will be provided via the Companies' and Green Bank's websites, EnergizeCT.com, webinars, and leave-behind materials such as brochures. Contractors may also be able to access a recorded presentation that the EEB Technical Consultants have developed for new Board members that goes through each program in detail. Existing contractor newsletters can also be utilized to disseminate information on other program offerings.

Previously, the Companies have had success with incentive adders and comprehensive project bonuses, with the caveat that net benefits still need to be positive. Depending on the program, these additional incentives can either flow to the customer or the contractor, but in any case, the incentives encourage comprehensive projects. To build off that success, the Companies are determining if it is feasible to have incremental incentives funded from various programs if customers participate in more than one program. Aside from direct adders, this gives contractors a built-in motivation to cross-promote programs as it will lead to larger overall projects.

## Internal Company Education

The Companies regularly provide formal and informal training sessions for sales engineers, account executives, customer service representatives, and the people responsible for answering calls on the Wise Use hotline. Going forward, the Companies will include information on other programs so that employees are able to understand and communicate the full suite of offerings. The goal will be to present at team meetings across the core four offerings in order to provide additional information about which each group is offering and the best way to refer customers between the different programs.

## Additional Accreditation

The Building Performance Institute (BPI) has recently developed the Total Building Performance (TBP) Certificate of Knowledge. BPI designed this credential to certify professionals who can manage complex residential decarbonization projects. The coursework and subsequent test are designed to help contractors identify and manage projects that aim to reduce household energy consumption by

at least 50% by addressing all major energy loads, including space conditioning, hot water, lighting, solar energy installation, appliances and plug loads, on-site power generation, electrical and thermal storage, and EV readiness.

According to BPI, the goal of the course is to develop TBP professionals who can serve as project managers and coordinate multiple contractors and ensure best practices are followed. TBP professionals can also guide customers through the retrofit process, helping them avoid delays and confusion, assisting customers in identifying and securing rebates, incentives, and financing. Lastly, a TBP professional should be able to oversee a complicated multi-measure project from scope development and design to installation, verification, and close-out reporting.

As part of the Companies' efforts to promote a coordinated initiative, they propose covering the costs associated with a limited number of contractors to become TBP certified. The Companies designed this education strategy to build confidence and competence across all touchpoints, ensuring that every stakeholder can contribute to the coordinated initiative's success.

## 5b. Marketing Strategy

To enhance visibility and engagement across all program offerings, a coordinated marketing strategy will be deployed. This strategy aims to promote cross-program awareness, improve customer conversion, and support contractors and internal teams in delivering a unified message. The Companies understand that there is a risk of oversaturating customers with marketing material and having a counter-productive effect by overwhelming customers. The Companies will be very mindful of this while developing the final marketing strategy.

The term "decarbonization" is used throughout this Plan document to describe the result of a customer participating in some permutation of the core four offerings. However, from a marketing perspective, the Companies may choose to approach customers and lead with a message focused on reduced costs, resiliency, or something else entirely depending on the situation. The idea is to meet the customer where they are and encourage cross-program participation regardless of the customers' motivations.

### Cross-Promotion and Joint Marketing

The Companies will continue to integrate links to related programs on various C&LM webpages. This will also include cross-program references on the Energize CT and Green Bank social media accounts, and in printed materials such as leave-behinds and the new HES report. The Companies and Green Bank will also look for opportunities for community-based marketing campaigns. The Companies also intend to further explore and enhance procedures for sharing customer lists, both of current participants and interested prospects, across different programs to support greater coordination and integration.

### Targeted Marketing

The Companies intend to engage customers at both the beginning and end of their C&LM project lifecycle to reinforce program value and encourage participation in complementary offerings. The solar PV program offers another good opportunity for targeted marketing and outreach. As a normal



course of action, the Companies normally market to customers who participate in the solar programs. However, it may be possible to engage in even more targeted marketing. As part of the solar PV application process, customers indicate whether they intend to add EVs or heat pumps to their homes, which in turn impacts the size of the solar system they are allowed to interconnect. The C&LM teams will consider requesting completed solar applications from the solar PV team to go back to customers who had previously indicated that they intended to install an EV or heat pump so that they can market directly to those customers.

Another consideration is to determine to what extent it may be possible to include multi-program recommendations as part of the updated HES customer reports. While that process is being handled in a different workstream, the team responsible for this coordinated initiative is actively following and participating in that workstream to ensure alignment and coordination.

## Promotional Materials

The Companies intend to use the marketing materials discussed in this section for customer education, including at customer events, trade shows, and community outreach efforts.

## Contractor Recommendations

For those customers interested in participating in multiple programs but do not know which contractors to work with, the Companies can link to or point customers to existing resources that maintain lists of contractors that work in different aspects of the core four program offerings. The Companies already provide a database of C&LM contractors through the Find a Participating Contractor database.<sup>10</sup> The ESS program maintains a list of participating contractors with descriptions of the services they provide.<sup>11</sup> The Green Bank has a database of contractors eligible to offer its financing products.<sup>12</sup> In many instances, these contractors have been vetted for licensure, have gone through program trainings, and have positive Better Business Bureau profiles.

One idea under consideration is to update the 'Find a Participating Contractor' database with a field that denotes whether a contractor can provide comprehensive decarbonization services. The Working Group undertook an exercise to review the most active contractors in each of the core four offerings with the goal of cross-referencing contractors active in multiple programs. The end result was a short list of contractors who actively operate across the core four offerings. This could form the basis for denoting which contractors provide comprehensive decarbonization services. Contractors on this initial list are all potentially good candidates to help implement the proposed pilot initiative that is described in more detail in subsequent sections of this Plan.

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<sup>10</sup> EnergizeCT.com "[Find a Professional](#)" webpage.

<sup>11</sup> Energy Storage Solutions "[Eligible Contractors and Third-Party Owners](#)" webpage.

<sup>12</sup> Green Bank "[Find a Contractor](#)" webpage.

## 5c. Operational Changes Strategy

To support the integration and scalability of the comprehensive core offerings, the Companies propose several operational enhancements. These changes aim to streamline service delivery, improve the customer experience, and incentivize deeper participation across the core four offerings.

### Expanded Technical Assistance and Scoping Studies

As part of the initial pilot effort described in greater detail in the subsequent section, the Companies will explore opportunities to broaden the scope of TA and scoping studies to encompass all four core offerings. This will provide more holistic assessments that identify opportunities across technologies.

### Assignment of Jobs

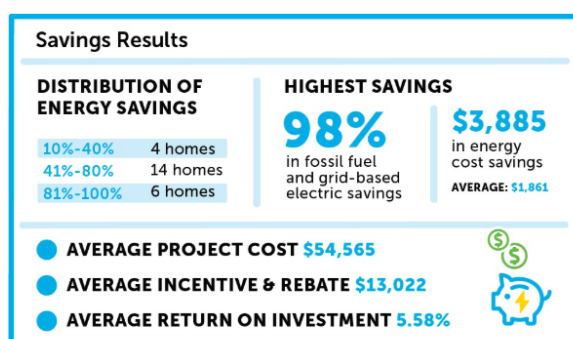
Another operational change being considered is ensuring that the Companies are aware of contractors who can complete complex multi-program jobs. If a customer expresses interest in more than one program, the Companies may directly assign work to those contractors willing and capable of multi-measure implementation, presenting contractors with an opportunity to further build out their business and diversify their operations. This is an incentive to encourage contractors to proactively identify and promote additional opportunities at a customer's home or business.

One goal of this initiative would be to train the vendor market to be proactive and to be on the lookout for customers that would potentially be good candidates and would benefit from a multi-program project. In this way, the contractor network could identify opportunities and bring those to the Companies, instead of the Companies simply assigning out jobs.

## 5d. Financing Strategy

After reviewing costs associated with multi-measure implementation in neighboring jurisdictions, many projects are likely to have total costs more than \$50,000 per project. Figure 12 shows that in Vermont's Zero Energy Now program, the average project cost for a house that installed C&LM measures, electrification, and solar PV was almost \$55,000. That did not include storage or EV charging measures.

**Figure 12.** Average Project Costs from Zero Energy Now



2016-2017 Zero Energy Now project results

The Green Bank's existing residential Smart-E loan<sup>13</sup> has a cap of \$50,000 with some limited exceptions. The Working Group noted the need to develop financing products with higher maximum loan amounts to support comprehensive upgrades. A collaborative approach is essential to develop a new financing product that supports comprehensive clean energy upgrades that exceed \$50,000. The Green Bank has indicated that the process should begin by clearly articulating the size and scope of the opportunity to potential lending partners. This includes demonstrating how current financing options fall short when customers pursue bundled measures such as the core four offerings. The goal is not to create a competing product, but rather to enhance existing offerings in partnership with lenders. It is likely that only a limited number of customers will be interested in the larger than average loans, so it is not imperative that every lending partner offers a product over \$50,000 but that there are at least few lending institutions that are interested in offering such a product.

The Working Group believes it will also be important to engage a group of lenders in a coordinated discussion to explore the feasibility of higher loan caps. The conversation should address concerns around unsecured lending, including risk rating protocols and underwriting standards. Understanding lender limitations and risk tolerance will be key to designing a product that is both attractive and sustainable. Ultimately, the objective is to work to make loans above \$50,000 a regular feature for at least a few of the lenders rather than an exception, enabling broader access to deep decarbonization solutions. The Green Bank has indicated that they are in the process of onboarding new lenders and that this may be the optimal time to discuss opportunities associated with these lenders for higher loan amounts for multi-measure projects.

For C&I customers, it may be possible to take advantage of the Green Bank's C-PACE program or on-bill financing through the Small Business Energy Advantage (SBEA) program. C-PACE is a financing program administered by the Green Bank that enables commercial property owners to fund energy efficiency and renewable energy projects while repaying the cost through a benefit assessment. The repayment is secured by a senior, non-accelerating lien on the property and transfers to future owners if sold. The SBEA program allows small business customers to potentially qualify for zero-interest and low-cost financing for C&LM and other energy upgrades that can be repaid on their utility bill.

There is also consideration of a lower interest rate option if a customer installs measures from across multiple programs. The Companies currently offer C&I customers a lower interest rate if they pursue comprehensive projects. This allows a customer to spread out projects over time, knowing that if they participate in one program, it opens up lower cost financing for future projects. This could be a potentially attractive option for a customer that wants to install measures from multiple programs but does not have the upfront capital necessary to do so.

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<sup>13</sup> The Smart-E loan currently can be used to finance costs associated with the core four offerings referenced throughout this Plan document in support of state energy and environment public policy objectives.



## 6. Pilot Proposal

### 6a. Overview and Objectives

The Companies designed the proposed pilot initiative to streamline and enhance customer access to decarbonization solutions by integrating multiple clean energy offerings into a single, coordinated experience. The pilot will focus on two existing programs, HES and Commercial and Municipal Energy Assessments for large C&I customers, which already include audit components and serve as strong foundations for expansion.

The main objective of the proposed pilot initiative is for the Companies to deliver a more unified and comprehensive decarbonization audit, or technical assistance/scoping study that actively identifies opportunities across the four core offerings. To streamline the customer experience, the Companies will search for ways to consolidate assessments, recommendations, and financing into a single process. By leveraging the existing contractor networks and program infrastructure, the pilot should lead to a blueprint for a scalable model designed for future expansion and help establish the future PMI metric.

### 6b. Key Features

#### Residential

For residential customers, the Companies will offer a more comprehensive audit that builds upon the existing HES audit and evaluates the property for all four core offerings. Where needed, multiple contractors may collaborate to complete the assessment. The Companies will seek to utilize auditors/contractors from previously identified firms that work across multiple program areas. Additionally, there may be firms that operate in neighboring jurisdictions that are equipped to provide cross-program services that could potentially be utilized in Connecticut for this pilot effort.

The pilot project will deliver comprehensive home energy assessments designed to identify practical opportunities for homeowners to reduce their energy consumption, lower utility bills, and transition toward cleaner energy solutions. The Companies are considering using research on customers' propensity to participate in order to identify customers that may be interested in multiple measures across programs. The Companies also would like to target pilot participants that represent a cross section of the service territories, including customers that may be eligible for the EV charger rebates under the new eligibility criteria. Each participating household will receive a customized Decarbonization Plan, presented as a detailed report.

This Decarbonization Plan will outline actionable recommendations aligned with relevant utility and state incentive programs, prioritized by impact, cost effectiveness, and ease of implementation. It will include identified upgrade opportunities across efficiency and demand response, solar PV, battery storage, and EV charging and a proposed roadmap and timeline for phased implementation of upgrades. To support successful execution of the Decarbonization Plan, a designated contractor will be available to assist homeowners throughout the decision-making process. This includes helping to interpret the report, understand available program pathways, and connect with qualified contractors or installers. As previously noted, the Companies have identified contractors operating across multiple

program categories and will ensure that customers are informed about which contractors are equipped to implement recommendations resulting from the enhanced audit.

The pilot will be led internally, with company lead personnel supporting customers directly rather than an external resource. The Companies will assemble a small working group of 5–6 subject matter experts (SMEs) representing each of the core four offerings, along with one principal coordinator. This will allow customers to enter the pilot through any program. Each customer in the pilot will be supported by a Company principal coordinator. Every month, the working group, including the SMEs, principal coordinators, and lead EE representatives, will meet to review incoming leads and projects to ensure alignment across efforts.

## Commercial & Industrial

For C&I customers, the Companies will be offering an enhanced Comprehensive Building Assessment (CBA) engineering study as part of the pilot initiative. To better support customers in achieving their clean energy goals, the Companies are enhancing the existing CBA to incorporate opportunities for elements from the core four offerings. While scoping studies have included opportunities associated with energy efficiency and ADR, the CBA normally provides a more in-depth analysis. Currently CBAs are particularly focused on electrification but within the pilot that scope will expand. The enhanced CBA will evaluate critical infrastructure elements such as electrical capacity, conduit routing, and the potential need for service upgrades, thereby offering a more robust assessment than a traditional scoping study.

The enhanced CBA for the pilot will include:

- Feasibility determinations for solar PV, battery storage, and EV charging, which may range from a simple Yes/No assessment to more detailed deliverables such as PV layout designs, demand charge analysis, and electrical capacity reviews.
- Basic electrical inspections, including panel evaluations and parking lot proximity assessments (for EV charging), to identify any major issues that could affect implementation.
- Utilization of existing contractor/vendor relationships to support expanded scopes with minimal additional effort.
- The Companies will also determine to what extent it is possible to make recommendations regarding the sequencing of upgrades as part of the CBA. This may be crucial as the size of the electrical load will influence issues like the size of the PV system.

Customer selection will be critical to the success of this pilot. The Companies will prioritize engagement with C&I customers who demonstrate interest and have access to funding or financing necessary to proceed beyond the assessment phase. While the preparation of technical reports is straightforward, the ultimate objective is to facilitate project implementation, ensuring that customers are equipped and motivated to take the next step.

Through this pilot, the Companies want to determine if an enhanced CBA can be a tool that not only identifies opportunities but also enables customers to invest in more measures across multiple programs. As noted above, residential participants will be pre-screened to ensure they are interested

in more than just weatherization, helping to target those most likely to benefit from a full decarbonization approach. Customers will receive a single, integrated report outlining actionable steps and bundled upgrade options across the core four offerings.

The program will seek to offer a consolidated financing solution. This is envisioned to be a variant of the Green Bank's Smart-E Loan or existing financing options through CPACE or Eversource's SBEA Loan program (which currently allows EV charging and battery storage as long as C&LM measures are installed). The goal is to cover all eligible upgrades under one financing application.

The pilot will prioritize contractors already active in multiple programs, as identified in the programmatic overlap analysis. This ensures a knowledgeable and experienced delivery network capable of supporting cross-technology installations.

## 6c. Expected Benefits

The Companies anticipate numerous benefits associated with this pilot. The main benefit will be the opportunity to generate insights that will be used to inform a scalable model for broader implementation across residential and C&I sectors. The overarching benefits that the Companies expect from a broader deployment of a coordinated initiative include:

- Increased customer adoption of comprehensive clean energy solutions.
- Improved coordination across programs and contractors.
- Enhanced operational efficiency and customer satisfaction.

## 6d. Budget, Timing, and Metrics

### Budget

The Companies anticipate allocating \$100,000 each to the Residential and C&I segments for a total budget of \$200,000. On the C&I side, the budget is expected to pay for enhanced CBAs for 6-10 customers with an estimated cost up to \$10,000 per study.<sup>14</sup> On the Residential side, the budget is expected to pay for a limited number of enhanced decarbonization audits, currently estimated to be between 10-20 customers. The Companies are working with potential contractors to better understand the per customer costs associated with this type of pilot. As the offering is not being rolled out at scale, the Companies expect a manual audit and recommendation process at first, which would result in costs that would not necessarily be reflective of a coordinated offering at scale. An additional budget will be used to develop marketing materials, cover any needed website updates, and cover contractor costs associated with the BPI TBP certification.

The funding for this pilot will come from existing budgets already approved in the 2025-2027 Plan. No additional funding is being requested for this pilot.

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<sup>14</sup> Abandon buildings will be considered on a case-by-case basis for inclusion in this pilot.

## Timing

The Companies anticipate launching this pilot in 2026, as the effort will be funded through the reallocation of pre-approved resources rather than requiring new funding. The pilot will be in place until 2028. The duration of the pilot is important because it is anticipated that it may take customers several years to install multiple measures across the different program areas. To ensure meaningful evaluation, the pilot must run for long enough so that the Companies can assess: (1) the overall effectiveness of the pilot, (2) the impact of marketing and training efforts, and (3) whether the enhanced audits and scoping/Technical Assistance studies led to more multi-program installations.

## Metrics

The Companies are proposing a series of metrics to help determine if the pilot is having its intended effects. As noted above, it is essential that the pilot runs for a sufficient duration to allow for robust data collection and analysis. This will enable the Companies to determine the approaches that are most effective in encouraging customers to install multiple measures across various programs.

The initial pilot metrics proposed by the Companies are:

- **Number of projects that have one or more combined measures.** Companies will track how many customers install measures from one program, two programs, three programs, or four programs for the duration of the pilot (2026-2028).
- **Ratio of number of measures recommended to number of measures that are adopted.**
- **Timing to adoption of measures, with the goal of reducing time to implement all measures.** If it becomes clear that it would be challenging to establish an initial baseline, the pilot could be used to set a baseline.
- **Percentage of participants who adopted each one of the different measure types.**
- **Qualitative feedback from customers about how the pilot influenced their investment decision.**
- **Number of contractors that receive the BPI TBP training and certification.**

The Companies plan to collect additional data that will inform the refinement and future design of similar offerings but will not directly tie back to the efficacy of the proposed pilot. The proposed metrics include:

- Average cost of multi-program projects.
- Average amount covered by incentives.
- Amount of financing needed (size of loan).
- Payback period of total project.

The coordinated Plan outlined in this document demonstrates the Companies' commitment to breaking down internal silos and offering customers a more seamless experience across multiple energy programs. By focusing on solar PV, EV chargers, battery storage, and C&LM measures, the Companies aim to provide a comprehensive and cohesive offering that maximizes customer benefits and promotes decarbonization. The collaborative efforts of the Working Group have been instrumental in identifying opportunities for cross-promotion and integration across these programs.

Moving forward, the Companies will continue to build on the preliminary activities and insights gained from the Working Group's internal surveys and external examples reviewed. The Companies will roll out targeted marketing and additional education opportunities. As part of the pilot, the Companies will offer enhanced CBAs and decarbonization audits. Working with the Green Bank, the Companies will seek to expand on existing financing options to support comprehensive upgrades. This Plan represents a proactive approach to addressing the evolving energy landscape and reinforces the Companies' dedication to decarbonization, cross-promotion of programs, and an improved customer experience.

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