

ENERGIZE CONNECTICUTSM

COMMUNITY PARTNERSHIP INITIATIVE

ROUND 2 APPLICATION FOR INTERESTED PARTIES

ISSUED DECEMBER 15, 2022

Application Deadline: Friday, March 17, 2023, by 5:00 p.m. EST

Summary: The Energize Connecticut Community Partnership Initiative offers funding towards community engagement projects focused on driving participation in select residential and small business energy efficiency programs and offerings. Eligible entities include community-based organizations, nonprofit organizations and municipalities that are either doing work in or are:

- **Connecticut Distressed Municipalities as defined by the Connecticut Department of Economic and Community Development**
- **Connecticut Municipalities containing Environmental Justice Census Block Groups within their boundaries as determined by the Connecticut Department of Energy and Environmental Protection**

Please contact Devan.Willemsen@eversource.com or Sheri.Borrelli@uinet.com with any questions before noon on Wednesday, March 15, 2023.

The Connecticut electric and natural gas utilities (The Connecticut Light and Power Company and Yankee Gas Services Company, each dba Eversource Energy (Eversource), United Illuminating, Southern Connecticut Gas and Connecticut Natural Gas, subsidiaries of AVANGRID, Inc., collectively, "the Companies"), as administrators of the Energize Connecticut energy efficiency programs, are committed to work with community outreach groups both affiliated with a municipality, such as Energy Task Forces, Energy Commissions, and community outreach groups unaffiliated with a municipality. The Companies' goal in working together is to better familiarize residents and businesses about energy efficiency programs and offers in support of efforts by the Companies for a broader reach of energy efficiency engagement and program participation across the state through the Community Partnership Initiative ("Partnership"). The goals of the Partnership work in concert with joint 2022-2024 Conservation & Load Management Plan goals. Funding support for the Energize Connecticut programs derives from a charge on customer energy bills.

The Partnership seeks to leverage the local knowledge, trusted relationships, and experience of Connecticut's communities, nonprofit organizations, and community-based organizations located in or serve the State of Connecticut Department of Community and Economic Development ("DECD") defined Distressed Municipalities or municipalities that contain environmental justice census block tracts, defined by the State of Connecticut Department of Energy and Environmental Protection ("DEEP"), established as of the publication of this call for applications, who are committed to raising awareness and measurable participation in the Companies energy efficiency offerings within these communities. Furthermore, participants in the Partnership will receive training on energy efficiency programs, learn how to encourage their communities to participate in opportunities that will save energy, work toward state and local climate goals, and network with other communities, among other benefits. The Partnership desires to emphasize outreach to the following select groups within a distressed community or census block: residents with limited English proficiency, customers who qualify for Home Energy Solutions¹ — Income Eligible, renters in single family homes or multifamily buildings, and small businesses ("Preferred Targeted Groups"). The Partnership does not replace current and future residential and small business marketing in Connecticut by the Companies, though aims to provide another layer of marketing and outreach to customers in the select groups mentioned above.

¹DECD defined Distressed Municipalities and DEEP determined environmental justice census tracts can both be found at this link: <https://portal.ct.gov/DEEP/Environmental-Justice/Environmental-Justice-Communities>

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To aid in the Partnership's goal of increasing awareness and measurable participation in energy efficiency incentives and programs² offered by the Companies, the Companies are soliciting applications from the above defined community groups, nonprofit organizations, and municipalities willing to team up with the Companies to join the Partnership and receive funding for energy efficiency outreach efforts. While community groups and nonprofit organizations can submit applications alone, the Companies require municipalities and organizations to partner together on their application and subsequent grassroots organizing, public education, and engagement activities during the program period. Round 2 is expected to run from the award date through December 31, 2023. The Companies also plan to coordinate a kickoff meeting, orientations, periodic calls, and best practice trainings for participants in the Partnership. Accepted applicants will receive funding upon signature of the participation memorandum of understanding ("MOU") please see sample posted with this application on [EnergizeCT.com](https://www.energizect.com) and the commencement of the program period, with further funding contingent upon project success.

Submission of this completed application indicates agreement in the terms subsequently outlined in the next several pages. Incomplete applications will not be considered. Please contact Devan.Willemsen@eversource.com or Sheri.Borrelli@uinet.com with any questions before noon on Wednesday, March 15, 2023. Questions received after that date will not receive a response to ensure fairness and remove partiality amongst applicants. An informational webinar regarding the Partnership's goals and application will be held on Tuesday, January 24, 2023, at noon and again at 7:00 p.m. A virtual open question forum will also be held on Tuesday, February 7, 2023, at noon and again at 7:00 p.m. Prospective applicants are welcome to attend and pose questions regarding this application to the Companies in an open forum format. Applications are encouraged to be submitted before the deadline of Friday, March 17, 2023, at 5:00 p.m.

Round 2 Community Partnership Initiative Participation Requirements and Details

What is the purpose of the Community Partnership Initiative?

The Community Partnership Initiative is an opportunity for communities to create outreach campaigns to educate their peers and increase participation in one or more of the following Project Focuses that align with the Companies energy efficiency offerings:

Project Focus 1: Demonstrating actions that will lead to an increase in homes participating in Home Energy Solutions - Income Eligible (through the municipality's Energize CT utility sponsor).

Project Focus 2: Demonstrating actions that will lead to an increase in the adoption of heat pumps among income-eligible customers. Note: Qualifying customers must also enroll in Home Energy Solutions - Income Eligible.

Project Focus 3: Demonstrating actions that will specifically target and increase the participation of small and microbusinesses in low-income and environmental justice areas in Small Business Energy Advantage.

Project Focus 4: Demonstrating actions that aim to increase deployment of energy efficiency programs to rental properties and multi-unit dwellings through coordinated outreach to multifamily property owners and managers.

Project Focus 5: Demonstrating actions that aim to increase uptake of demand response and deep energy-saving measures.

²Please see Appendix A for a list of energy efficiency incentives and programs that the Companies encourage participants to champion in their community.

Applicants are asked to select between a short-term campaign (three to six months) or a long-term campaign (eight to twelve months) to direct during the program term. Applicants will meet with staff from the Companies to discuss their application and create campaign goals that consider the length of their campaign, resources, and available past participation data in relevant Company offerings. It is preferred for one Project Focus to be selected for the program term; compelling campaigns that have multiple Project Focuses will be considered.

Who Can Apply and Participate in the Partnership?

Community groups and nonprofit organizations, which broadly includes, houses of worship, civic organizations, environmental groups, business organizations, block and neighborhood organizations, social service organizations, merchant organizations among others, located within the State of Connecticut and the Companies' service areas are welcome to apply for this funding opportunity. These entities are encouraged to apply to facilitate outreach campaigns, aimed at increasing participation on a Project Focus, within municipalities identified as either DECD Distressed Municipalities or municipalities containing DEEP defined environmental justice census block groups currently identified at the time of the publishing of this call for applications. The DECD list of distressed municipalities is revised each year, and, for the purposes of the Partnership, the Companies will accept distressed municipalities identified from calendar year 2017 onward. The Companies strongly encourage organizations to partner on applications. DECD Distressed Municipalities or municipalities containing DEEP defined environmental justice census block groups identified at the time of the publishing of this call for applications are also welcomed to apply if they are partnered with a community group or nonprofit organization. For example, an application that is jointly submitted by the town of Smithville³ and its citizen-run Energy Task Force would be welcomed. Another example would be an application submitted together by a local community action agency and the town of Smithville. Community-based organizations and non-profit organizations are also welcomed to submit applications without a partner; however, joint applications are encouraged. Regardless of the entity applying, it is encouraged, but not required, to submit with the application a letter of support on municipal letterhead from the municipality where the planned outreach will take place. If the outreach will encompass more than one town, letters of support from each municipality are encouraged.

Additional Application Guidelines

Applicants will designate a project lead for each entity involved with each application. For example, the application that is jointly submitted by the town of Smithville and its citizen-run Energy Task Force would include a project lead for the town of Smithville and a project lead for the Energy Task Force or Committee. The alternate example of the local community action agency and the town of Smithville would also include a project lead for the community action agency and a project lead for the town of Smithville.

- ◇ Municipal project leads should be a member of staff. This could include the Town Manager, Mayor, First Selectman, Town Administrator, or Energy Manager.
- ◇ Nonprofit organization project leads should be a full-time staff member.
- ◇ Community groups, such as energy task forces or congregations, must appoint a dedicated leader to serve as the project lead.

The application must indicate a single fiduciary agent. Funding can only be awarded to a municipality or designated organization with a Federal Tax ID. Individuals are not eligible to solely qualify as a Partnership participant or as a recipient of funding without affiliation with a qualified organization. If an Energy Task Force partners with its municipality, then the municipality would act as the fiduciary agent. If an organization partners with a municipality, then it is at the discretion of the parties to decide where fiduciary agency lies.

³Fictitious municipality created for the purposes of example.

Note: If an organization does not have the capability or incorporation to serve as its own fiduciary but remains interested in applying to the Community Partnership Initiative, representatives for this entity should reach out to the Companies prior to application submission for support on this item.

What Are the Benefits of Participating in the Partnership?

Funding awards will be based on the project submitted on the application, the selected Project Focus, and population served by the proposed outreach activities. Base funding awards for both short-term and long-term campaigns range between \$5,000 and \$50,000 depending on the scope of the campaign plan.

Once an application is reviewed, the Companies' staff will reach out to the applicants and collaborate on a scope of work for their project that drives increased participation in the Energize CT programs in their community through their chosen Project Focus. An agreement, or Memorandum of Understanding ("MOU"), between the Companies and the project team will be drafted and provided to the team for their signature. If an organization is acting as a fiduciary agent, the fiduciary agent organization will need to invoice for the funding amount. Monies shall be deposited into an applicable account with receipts and disbursements reconciled and reported monthly. The funding amount will correlate to the goal the participants chose to pursue and will be used for costs associated with their energy efficiency outreach plans, set up, and initial efforts. High achieving projects may be eligible for further funding, based on results and demonstrated need within the project period of Round 2.

Additional Resources Offered to Partnership Participants

Partnership participants will receive additional support from the Companies, including but not limited to:

- A designated Company staff person.
- An orientation session, including introductory training on energy efficiency programs.
- Energize CT and utility company-specific marketing materials (e.g., brochures, talking points, presentations, newsletters, and digital communications, etc.) promoting the Companies' energy efficiency programs, directing customers to 877-WISE-USE or online lead forms.
 - ◇ The Companies can provide participants with talking points, brochures, and presentation slides related to the goals of the Partnership. The Companies will advise on and/or contribute to any items the participants might create and distribute. These items may include newsletters, brochures, flyers, and other communications.
 - ◇ Collateral may be co-branded with Energize CT, sponsoring Company, municipal seal, and/or logo of the community group.
- Periodic information and strategic consultations regarding individual progress toward their specific goals.
- Periodic conference calls to discuss outreach, celebrate successes, share challenges, and best practices to address barriers to achieve greater energy efficiency program participation.

How Can the Participants Attain Partnership Goals?

In the "Evaluation Process" section in the application, applicants should outline specific outreach methods and efforts that they plan to implement as part of their outreach in the Partnership. Municipal applicants should describe the role of any local community-based organizations in their efforts, including any organizations they are partnering with on this application. The Companies are looking for innovative and creative ways to encourage participation in energy efficiency programs. Partnership goals will be uniquely developed for each applicant with the Companies and formally agreed upon through their MOU scope of work. Examples of potential outreach methods include:

- Creating videos and interviews with municipal officials and other local leaders promoting energy efficiency programs.
- Partnering with large employers to reach employees who live in the target municipality.
- Hosting virtual or in person coffee hours for small portfolio rental property owners, property managers, and condominium associations or communities.
- Co-sponsoring events or webinars/workshops with local small business associations.
- Engaging with municipal community development, public works, etc. (e.g., packaging energy efficiency materials with department of water bill inserts for mailings, use of local assessor's data)
- Collaborating with local community-based organizations and faith-based groups in the community to build trust and awareness about Energize CT energy efficiency programs among residents and ensure effective outreach to multilingual residents.
- Holding open houses hosted by local community members and small businesses to highlight energy efficiency upgrades and technologies (when safe to do so).
- Partnering with schools and student/parent groups and collaborating with the Companies' K-12 Energy Education curriculum, professional development, and outreach programming.
- Develop collaborative relationships with Energize CT business partners to follow through on developed customer leads.

What Will Be the General Responsibilities of Partnership Participants?

- Ensure fiscal transparency by providing the Companies with a budget that breaks down how funding will be received, and disbursements will be spent. Budgets must be signed off by participating organizations and fiduciary agents, and the Companies will provide feedback on each budget proposal before disbursement of funds.
- Provide monthly reporting that includes grant fund reporting, outreach progress summaries, including data collection on number of residents and/or businesses in each target group being reached, and any barriers to program participation and successes that your outreach efforts have revealed. Monthly reports for year-long campaigns will be due on the 15th of each month for the previous month's activities and plans for upcoming activities. Short-term campaigns will be responsible for monthly reports during their campaign.
- Attend mandatory introductory training on targeted energy efficiency program offerings and best practices in marketing and community outreach. Any outreach materials developed for the Partnership must be reviewed, approved, and finalized by the Companies before public distribution.
- Participate in periodic calls with the Companies and the other participants in the Partnership.
- A final report (1-3 pages) on progress at the end of the year due within ten (10) business days after the close of their grant award period. In addition to the final report for Round 2 activities, Partnership participants must fill out a brief survey on how the award funding worked with their project and how they would like to stay engaged with the Companies regarding energy efficiency programs after their Partnership participation year concludes.
- If the Partnership has not developed specific collaborative relationships with Energize CT authorized contractors, any marketing materials developed by the participant must direct customers to an authorized contractor to implement those programs, an Energize CT online lead form or application, or 1-877-WISE-USE. Additionally, customers who reside in, or property managers/building owners of, a multifamily building with five or more units should contact 1-877-WISE-USE.

What is the Application Process?

Interested applicants should complete the application form included in this document. Responses to open-ended questions should be formatted in bulleted lists rather than narratives, wherever possible. If you have questions about the application process, please attend the applicant webinar which will be held on Tuesday, January 24, 2023, at noon and again at 7:00 p.m. or attend the open question forum which will be held Tuesday, February 7, 2023, at noon and again at 7:00 p.m. You may also reach out to Devan Willemsen at Devan.Willemsen@eversource.com or Sheri Borrelli at Sheri.Borrelli@uinet.com with questions before noon on Wednesday, March 15, 2023.

Applications must include the following:

- A completed and signed application form. Please answer all questions in the application. Incomplete applications will not be considered.
- ◊ The application requires supplemental documentation including a copy of a W-9, project budget, identified fiduciary agent, among other project strategy details. Applicants should review the entire form before completing responses.

Applications are also encouraged, but not required, to include the following:

- An official letter of support from the Mayor, Town Manager, First Selectman, Town Administrator, or Energy Manager representing the municipality where the project work will take place.
- Memorandum of understanding (“MOU”) agreements between cooperating parties, especially those submitting joint applications.
- Other supporting documentation that supports their project. Please limit this to no more than five (5) items for a total of ten (10) pages for the entirety of the application.

How Will Applications Be Evaluated?

Community groups, nonprofit organizations, and municipalities located within the state of Connecticut and the Companies’ electric service area are encouraged to apply. Selection of the proposals will be made by the Companies based upon the following criteria: Application completeness and quality; ability to achieve the selected Project Focus; relevant experience and strength of ties in the target community; target community energy efficiency savings potential, and preliminary project budget. Applications focused on engaging preferred Targeted Groups will be given preferential consideration. Geographic, economic, and demographic diversity of the target municipality will also be given higher consideration, including:

- Target municipality has a below-average historic participation in the Energize CT energy efficiency programs.
- Target municipality has high concentrations of renters and income eligible customers, based on U.S. Census data.
- Target municipality/census tracts that have high concentrations of renters who are responsible for their own heating and cooling.

It is important to note that while applications must be complete to be considered, submitting a complete application does not guarantee funding.

Tentative Project Schedule*

| Key Activity | Date |
|--|--|
| Informational Webinar With The Companies For Interested Applicants | Tuesday, January 24 at noon and at 7:00 p.m. |
| Virtual Open Questions Forum With The Companies | Tuesday, February 7 at noon and at 7:00 p.m. |
| Questions Closed | Wednesday, March 15 by noon |
| Applications Due | Friday, March 17 by 5:00 p.m. |
| Applicant Meetings & Discussions | Upon return of application |
| Round 2 Projects Begin | Determined by individual project scope |

*This is not a final schedule and for planning purposes only.

** MOU must be signed prior to submitting an invoice for awarded funding.

APPLICATIONS MUST BE COMPLETE TO BE CONSIDERED.

DISCLAIMER: The Companies may terminate a municipality’s or community group’s participation in the Community Partnership Initiative if the Companies determine the municipality or community group is not demonstrating a good faith effort to reach the Minimum Participation Requirements. The Companies may, in their sole discretion, at any time and without notice, terminate the municipality’s or community group’s participation in the Community Partnership Initiative or modify the Community Partnership Initiative and the terms outlined herein. Community Partnership Initiative expenditures, requirements and eligibility may be terminated, canceled, or modified by the Companies at any time without notice. Applicant understands that all funding for rebates under this program derives from the Energy Efficiency Fund, which is managed, in part, by Eversource and The United Illuminating Company, and funded, in part, by their customers. Neither Eversource nor The United Illuminating Company guarantee the availability of funding for the program, and neither is responsible for any costs or damages incurred by applicant if funding for this program or the Energy Efficiency Fund is reduced or eliminated by the State of Connecticut, the Public Utilities Regulatory Authority, Department of Energy and Environmental Protection or other State of Connecticut action. Funding is subject to change at any time without notice.

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ROUND 2 APPLICATION FOR INTERESTED PARTIES
 ISSUED DECEMBER 15, 2022

APPLICATION FORM

Application for the Energize ConnecticutSM Community Partnership Initiative – Round 2

Please use this form to complete your application. A bulleted list format is encouraged where possible. A memorandum of understanding (“MOU”) between cooperating parties and letters of endorsement may be included as attachments. **Applications due Friday, March 17 by 5:00 p.m. by emailing this form and any supporting materials to either devan.willemsen@eversource.com or sheri.borrelli@uinet.com.**

Note: This is a fillable form document. If you have problems with this document or would like to receive the application in a Word document format, please reach out to the Company staff noted above for support.

Check this box if you are a returning participant from Round 1 of the Community Partnership Initiative:

Select one:

This project will be a short-term project (between three to six months).

This project will be a yearlong project (between eight to twelve months).

Groups/Organizations/Municipalities Applying:

Target Municipality or Municipalities for Outreach:

Point of Contact Name, Title & Affiliation:

Email & Phone:

Secondary Point of Contact Name, Title & Affiliation:

Email & Phone:

Fiduciary Agent Organization:

Fiduciary Agent Point of Contact Name and Title:

Fiduciary Agent Email:

Fiduciary Agent Phone:

Please briefly describe how the above organizations will work together:

Do you know if the municipality you are planning to conduct outreach in is a current and/or planned participant in a state and/or federal energy efficiency program(s)? If so, please share the program(s) here:

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Select which Project Focus(es) your project will pursue.

| | |
|--------------------------|---|
| <input type="checkbox"/> | Project Focus 1: Demonstrating actions that will lead to an increase in homes participating in Home Energy Solutions - Income Eligible (through the municipality's Energize CT utility Sponsor). |
| <input type="checkbox"/> | Project Focus 2: Demonstrating actions that will lead to an increase in the adoption of heat pumps among income-eligible customers. Note: Qualifying customers must also enroll in Home Energy Solutions - Income Eligible. |
| <input type="checkbox"/> | Project Focus 3: Demonstrating actions that will specifically target and increase the participation of small and microbusinesses in low-income and environmental justice areas in Small Business Energy Advantage. |
| <input type="checkbox"/> | Project Focus 4: Demonstrating actions that aim to increase deployment of energy efficiency programs to rental properties and multi-unit dwellings through coordinated outreach to multifamily property owners and managers. |
| <input type="checkbox"/> | Project Focus 5: Demonstrating actions that aim to increase uptake of demand response and deep energy saving measures. |

Share your strategy or strategies for achieving an increase in Energize CT programs that are relevant to your chosen goal. Please include a description of your strategy (3-10 bullet points or a ½ a page) that includes details on the outreach to your target community.

Share how you would use your funding to increase participation in the Companies' offering(s) noted in your chosen Project Focus area.

Share a timeline of your project that aligns to your selections above.

Share how you will organize your project to meet project reporting, invoicing, and general administration requirements.

Share a description of current and pre-existing relationships with organizations within your community and to what extent the Partnership's efforts will build on them.

Share a description of the personnel/volunteers/interns assigned to your project and their specific project responsibilities, including a brief statement of qualifications for each key team member. Include specific staff/volunteers and hours allocated to this effort.

Share a description and budget breakdown that illustrates how your project funding would be used to further participation in energy efficiency programs in your target municipality. Note that it is preferable to present the budget in spreadsheet format with brief descriptions for each line item.

Share how your outreach will include focused initiatives to reach distressed U.S. Census blocks, areas with a high concentration of renters, residents with limited English proficiency, and/or income-eligible residents.

Application Signatures:

I certify that I am an authorized signatory for the Applicant Community Group, Organization or Municipality.

By checking this box and typing my name below, I am electronically signing my application.

Name and Title (Please Print):

Community Group, Organization or Municipality:

Date:

I certify that I am an authorized signatory for the Applicant Community Group, Organization or Municipality.

By checking this box and typing my name below, I am electronically signing my application.

Name and Title (Please Print):

Community Group, Organization or Municipality:

Date:

I certify that I assume fiduciary agency for this application.

By checking this box and typing my name below, I am electronically signing this application and my entity assumes fiduciary responsibilities for disbursement of funds.

Name and Title (Please Print):

Organization or Municipality:

Federal Tax ID:

Date:

***** Applications Due Friday, March 17, 2023 by 5:00pm. *****

Appendix A: Targeted Energy Efficiency Measures for Partnership Outreach

Home Energy Solutions - Income Eligible

The Home Energy Solutions - Income Eligible program is designed to help income-qualified residents receive home efficiency upgrades and comprehensive weatherization services at little or no cost. To qualify, a family's combined gross annual income must be 60 percent below the state median income. If a home qualifies for additional services (such as insulation, windows, a water heater, a heating system, including heat pumps, or a more energy-efficient refrigerator) that work may be performed at reduced cost during a future visit.

Small Business Energy Advantage ("SBEA")

A SBEA Eversource or The United Illuminating Company authorized contractor will perform an energy assessment (audit) of a small business facility at no cost. The customer's respective Sponsor reviews the assessment, and if approved, the SBEA contractor will present a comprehensive proposal to the customer that includes energy-saving improvements that make sense for the business, complete installation costs and estimated energy savings, along with any incentives and financing options. Measures include high-performance lighting, occupancy sensors, HVAC (heating, ventilation, and air conditioning) equipment, programmable thermostats, energy management systems, high-efficiency commercial kitchen and refrigeration equipment, air compressors, premium-efficiency motors, envelope and water-saving measures, and custom measures.

Multifamily Initiative

Through the Multifamily Initiative, a multifamily property, of five or more units, can be assessed and receive customized energy efficiency solutions. This process includes:

- Assistance with energy efficiency upgrade projects already planned
- An assessment of the building's energy-saving opportunities
- Resources to support in-depth assessment of a full range of strategies for further improvements including solar and other renewable energy, as well as health and safety measures
- Incentives and financing for energy efficiency upgrades

Demand Response

Demand response helps relieve strain on the electrical grid and reduce carbon emissions. Customers can contribute by reducing their energy use when there is high demand or stress on the grid. This helps defer some energy use to times when energy is generated by cleaner, less carbon-intensive energy sources. By participating in a demand response program, customers can earn incentives for their home or business for reducing carbon emissions and keeping energy costs low for everyone.

Residential electric customers can enroll eligible Wi-Fi-connected devices like smart thermostats and home battery storage systems in a demand response program. Residential customers can also enroll an eligible Level 2 EV smart charger.

Other, non-small business commercial or industrial electric customers can earn demand response incentives directly by enrolling a battery or thermal storage system.

There are also curtailment service providers (CSPs), which are trusted utility partners who can provide commercial and industrial customers with demand response services that facilitate easier participation, such as metering installation and data management. In return for their services, customers split their incentive payment with them. A CSP is not needed to participate or earn incentives, but their services often reduce operational impacts and can provide additional valuable information about energy use.