



CADMUS

**DEMAND-SIDE MANAGEMENT LONG-TERM PLAN
PROJECT MANAGEMENT REPORT**

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1. Introduction

To assist Virginia Electric and Power Company (“Dominion Energy Virginia” or the “Company”) with planning to meet legislative requirements outlined in the Grid Transformation and Security Act (“GTSA”), effective July 1, 2018, and the Virginia Clean Economy Act (“VCEA”), effective July 1, 2020, the Company hired Cadmus, a third-party vendor, to develop the Company’s Long-Term Plan (“LTP” or “LTP21”). This LTP was the culmination of extensive research, stakeholder input, and quantitative analysis, which Cadmus used to outline proposed short-term, medium-term, and long-term recommendations in the Company’s LTP, filed as part of the 2021 DSM proceeding in Case No. PUR-2021-00247.

Among the recommendations in the LTP, Cadmus outlined a more streamlined framework for its customer-facing demand-side management (“DSM”) programs and a path to transition its existing operating environment to achieve its goals.¹ The recommended structure consolidates the Company’s existing portfolio of programs into a more cohesive set of offerings to help its customers install energy efficiency upgrades in their homes and businesses. Cadmus analyzed the potential energy savings impacts and presented recommendations towards achieving Dominion Energy Virginia’s targets, which include transitioning to a more consolidated program structure where appropriate and, combined with implementing a broad customer awareness campaign, seeking approval for an administrative process to enable increased programmatic and budget flexibility, as well as other suggestions aimed at improving the Company’s current portfolio performance. Notably, the LTP reflects a snapshot in time, is directional document in nature, and thus is an evolving Plan that needs to be appropriately adjusted to address changing conditions in the utility sector and economy. The Company—while actively working to plan for and implement, where practicable and feasible, the LTP21’s short-, medium-, and long-term recommendations and action items identified by Cadmus, and continuing to be actively engaged in the DSM stakeholder process—has updated its Long-Term Plan (now LTP25), filed concurrently with this LTP Project Management Report.

In its Final Order in Case No. PUR-2022-00210 (“2022 DSM Order”), the Virginia State Corporation Commission (“SCC”) directed Dominion Energy Virginia to provide a Project Management Report regarding implementation of its LTP as part of its annual DSM filing. The SCC, in PUR-2023-00217, subsequently confirmed its directive to continue filing a Long-Term Plan Project Management Report in future DSM filings, adding that such reports should incorporate quantifiable data sets where feasible.² As with the initial LTP Project Management Report, this Report provides a status update on each short-, medium-, and long-term recommendation provided in the LTP, including a summary of progress made during calendar year (CY) 2024, and more detailed information on tasks that were completed in the first 11 months of 2025 (CY2025), what tasks will be completed in the next twelve months, and what

¹ Consistent with the Commission’s directive in the 2020 DSM proceeding, the Company filed a long-term plan in the 2021 DSM proceeding that detailed the Company’s strategy to comply with the total energy savings targets required by the VCEA. *Petition of Virginia Electric and Power Company, For approval of its 2020 DSM Update pursuant to § 56-585.1 A 5 of the Code of Virginia*, Case No. PUR-2020-00274, Final Order at 11-12 (Sept. 7, 2021).

² Case No. PUR-2023-00217, Final Order adopting at page 18 the Hearing Examiner’s recommendations, including #21 set forth at page 8 (July 26, 2024).

recommendations remain to be completed from the LTP.³ It also includes quantifiable data to inform the Commission and interested stakeholders, where available and applicable.

Future LTP Project Management Reports will report on progress made toward recommendations in LTP25—the Company’s updated Long Term Plan).

1.1. Short-Term Recommendations (2021 to 2023)

Continue as planned to develop an overarching portfolio marketing strategy that complements program-specific targeted marketing.

In its 2022 DSM Order, the Commission approved the Company’s request to direct funding toward improving customer awareness and marketing to increase program enrollment. To help achieve this goal, the Company used a competitive bidding process to select an experienced marketing and advertising firm to integrate and work with Dominion Energy’s Corporate Communications strategies and opportunities to assist customers with saving energy and affordability. The customer awareness firm works with the Company’s Energy Conservation team, Corporate Communications group, and implementation vendors to develop and implement the overarching marketing strategy. Working diligently with the customer awareness vendor, the Company made considerable progress on the implementation of a portfolio marketing strategy aimed at increasing overall awareness of its DSM programs and the benefits of adopting energy saving technologies and conservation-related behaviors.

The Company has successfully completed the short-term recommendation to initiate a broad awareness campaign. While working with the general awareness firm during CY2023, the Company completed an evaluation of opportunities to improve Search Engine Marketing (SEM) and Optimization (SEO) and conducted research on utility program marketing best practices before launching a general awareness campaign in July 2023. In its first year, the awareness campaign initiated several tactical elements, including developing branding and messaging strategies and marketing materials, reviewing program websites to align content, and launching a search engine-focused general marketing campaign. The Company also conducted vendor and customer meetings in 2023 and worked with the SCC-appointed Independent Monitor to meet with the Virginia Energy Efficiency Stakeholder Process subgroup on customer awareness.

Status: Completed; a portfolio marketing strategy has been developed, and continues to evolve

Tasks Completed (CY2025):

- Not applicable. The Company developed an overarching marketing strategy in 2023. and continues to execute the campaign’s tactical elements, including integrated user experience, digital and traditional media, creative elements, and analytics. Detailed information on the Company’s awareness campaign strategy and progress metrics can be found in Attachment A.

³ In a few instances, this Report identifies LTP21 tasks to be completed in the next twelve months that have been superseded by LTP25

Quantitative Data:

- Not applicable. See related progress metrics in Section 1.4.

Tasks to be Completed (Next 12 Months):

- Not applicable. Short-term task completed.

Prepare to launch the streamlined DSM portfolio structure in customer-facing communications as soon as possible. Seek to simplify the customer experience by consolidating program offerings into the seven programs outlined in this Plan.

The Company worked with its implementation vendors to bundle program offerings and with its customer awareness firm to develop customer-facing program materials that present the consolidated offerings, streamline the customer experience, and increase ease of participation. While a more streamlined portfolio with fewer, more comprehensive programs is consistent with best practices used in other jurisdictions, the Company’s phased approach features managed changes to the portfolio structure that consider customer preferences and ease of enrolment, while systematically working with vendor contracts and relationships that were the basis of SCC-approved cost-effective programs.

In CY2023, the Company built on these early actions, implementing tactical marketing measures to give energy conservation programs a streamlined appearance on its energy conservation program website. The Company also coordinated with vendors to align the new marketing strategy with their program-specific promotional tactics. The Company created conservation branding and templates such as bill inserts, email templates, postcards, digital templates, PowerPoint presentations, and print ads to help implementers develop specific assets quickly.

The Company’s consolidated program portfolio naturally varies from the exact structure outlined in the LTP while maintaining the core best practice of a more streamlined experience for customers and more manageable portfolio delivery and operations for Dominion Energy Virginia. In customer-facing communications, the Company organized the consolidated portfolio into five streamlined and appropriate program bundles for residential customers and three program bundles for business customers, as shown in Table 1 below.

It is worth noting that customer-facing messaging, which aims to communicate comprehensive offerings and meet customers’ evolving needs, varies from the presentation of Dominion Energy Virginia’s portfolio structure to regulators. Specifically, while the regulatory presentation of programs is more rigid and based on regulatory guidance (e.g., reporting on budgets, costs, and cost-effectiveness of program elements that may have been bundled into other programs), customer presentation is more streamlined and flexible and is continuously evaluated to ensure it aligns with customer needs, changing market trends, and new information. A primary example of this is how a program might be listed on the Company’s website.

Table 1. Streamlined DSM Portfolio Program Bundles as of December 1, 2025

Customer-Facing Program Bundles	Program Offerings
Save Energy At Home: Residential Program Bundles⁴	
<i>Rebates & Discounts on Energy-Efficient Equipment & Appliance</i>	<ul style="list-style-type: none"> • Smart Home Kits • Smart Thermostat Rebates • Energy STAR Products Marketplace • Water Energy Rebates
<i>Home Energy Audit</i>	<ul style="list-style-type: none"> • Virtual Energy Audit • Home Energy Evaluation • Manufactured Housing Program • Multifamily Program
<i>Rewards for Saving Energy (Demand Response)</i>	<ul style="list-style-type: none"> • Smart Thermostat Rewards (DR) • Electric Vehicle Charging Rewards (DR) • Electric Vehicle Telematics (DR) Pilot • Peak Time Rebates (DR) • Water Savings (DR)
<i>Income and Age Qualifying (IAQ) Programs</i>	<ul style="list-style-type: none"> • Residential Income and Age Qualifying Program • Home Energy Report for IAQ customers • EnergyShare Weatherization
<i>Other Approved Programs</i>	<ul style="list-style-type: none"> • New Customer Welcome Kits (EE) • Residential New Construction (EE) • My Energy Target (Behavioral Program) • Home Energy Reports (Behavioral Program)
Save Energy for Your Business: Commercial Program Bundles⁵	
<i>Programs for Every Industry</i>	<ul style="list-style-type: none"> • Data Centers • Hotel & Lodging Energy Solutions • Healthcare Energy Solutions • Agriculture
<i>Customized Energy Solutions for Your Business</i>	<ul style="list-style-type: none"> • Prescriptive Enhanced Program (bundling several equipment and system options) • Lighting Systems & Controls • Custom Energy Solutions • Building Automation • Building Optimization • Midstream Products • New Construction • Distributed Generation (Peak-shaving) • Small Business Improvement • Commercial Multifamily Building Engagement
<i>Other Approved Programs</i>	<ul style="list-style-type: none"> • Small Business Energy Reports • Non-residential Curtailment (DR) (approved in 2024 DSM Proceeding)

⁴ At <https://www.dominionenergy.com/virginia/save-energy/my-home>

Status: Completed; customer-facing marketing and communications reflect a streamlined portfolio structure (see Table 1).

Tasks Completed (CY2025):

- The Company has continued to present and maintain the streamlined portfolio of customer-facing home and business programs on the Company’s *Save Energy & Save Money* site (<https://www.dominionenergy.com/virginia/save-energy>) and in other customer-facing materials throughout 2025.

Quantitative Data as of December 1, 2025:

- A total of 19 programs for residential customers, including IAQ customers, have been streamlined into five customer-facing bundles.
- A total of 16 programs for business customers have been streamlined into three customer-facing bundles.

Tasks to be Completed (Next 12 Months):

- Not applicable. Short-term task completed.

In 2022, begin planning for the development of a custom program offering for large nonresidential customers.

Dominion Energy Virginia selected a program implementation vendor and submitted the Nonresidential Custom program as part of its DSM Phase 11 filing, which was approved in the 2022 DSM Final Order on August 4, 2023, in Case No. PUR-2022-00210.

Status: Completed; the Company launched the Program in Q1 of 2024.

Tasks Completed (CY2025):

- The Company signed a purchase order to engage the selected implementation vendor in 2023 and launched the Program in Q1 of 2024.

Quantitative Data:

- Not available. The program launched in Q1 2024.

Tasks to be Completed (Next 12 Months):

- Not applicable. Short-term task completed.

⁵ At <https://www.dominionenergy.com/virginia/save-energy/my-business>

With the 2021 DSM filing, pursue options to increase programmatic, budgetary, and filing flexibility and prepare for a 2022 (Phase 11) filing that facilitates the transition to a streamlined portfolio and adheres to SCC guidance.

The Company proposed an administrative process for increased programmatic and budget flexibility between filings, which was denied by the SCC in Case No. PUR-2021-00247 (“2021 DSM Order”). The Company also requested and received approval to increase each program's cost cap buffer from 5% to 15%.

Status: Company completed task; Commission denied request.

Tasks Completed:

- In the 2021 DSM filing, the Company requested approval for a proposed framework that would allow flexibility for funds to be shifted between components and pathways in the consolidated programs, while remaining within budget caps. The Commission’s 2021 DSM Order denied the request.

Quantitative Data:

- Not applicable.

Tasks to be Completed (Next 12 Months):

- Not applicable. Future tasks are superseded by processes in LTP25.

Begin to outline a plan and schedule to bring implementation vendor contracts with different periods of performance into alignment as they expire.

The Company initiated a process to align its implementation vendor contracts, beginning with programs that offer commonalities across current vendors, program design elements, and periods of performance.

Status: Completed; the Company developed a plan to align vendor contracts with streamlined programs.

Tasks Completed (CY2024):

- Short-term task was completed. See progress metrics in Section 1.4.

Quantitative Data:

- Not applicable. See quantitative metrics associated with medium-term recommendations in Section 1.2.

Tasks to be Completed (Next 12 Months):

- Not applicable. Future tasks are superseded by processes in LTP25.

Review the trade ally networks managed by program implementers and explore opportunities to expand trade ally representation through increased marketing, outreach, education, and training.

Through its process evaluations, Cadmus assesses the sufficiency of trade ally coverage across the relevant programs’ key equipment offerings and identified some gaps in trade ally capacity for refrigeration and air conditioning measures in the small business program. The Company is also

proceeding with an overall review of its trade ally networks and has initiated marketing to increase trade ally support. Additional analysis of trade ally coverage will be conducted through targeted program process evaluations as they occur. Not all programs rely on a trade ally network for delivery.

In CY2023, the Company worked with implementation vendors to bolster trade ally representation and skills across key service and technology areas, through Building Performance Institute (BPI) training classes. In 2024, the Company continued and expanded these efforts, building on the short-term recommendation to assess the trade ally network and initiate activities to increase trade ally representation and engagement through improved communications and training.

Status: Completed; the Company has initiated actions to expand trade ally representation.

Tasks Completed (CY2025):

- Worked with implementation vendors to recruit trade allies for program participation based on the services they offer, their technical capabilities, and the programs’ alignment with their business goals.
- Implementation vendor continued to host BPI training classes at discounted rates in strategic areas to increase program participation.
- Offered recognition and incentives to full status participating trade allies who achieved specific production goals for major measure installations while maintaining program standards for quality workmanship and documentation of work performed.

Quantitative Data:

The Company’s trade ally network has grown each year since 2021. Over 700 trade allies presently participate in the Company’s contractor network, as shown in Table 2.

Table 2. Growth in Dominion Energy Trade Ally Network (2021-2025)

	2021	2022	2023	2024	2025 (to date)
Trade allies in contractor network	245	321	403	508	722

Tasks to be Completed (Next 12 Months):

- Not applicable. Future tasks are superseded by processes in LTP25.

Initiate targeted process evaluations to assess the market performance of priority programs and provide insights and actionable recommendations for improvement.

In 2022, the Company engaged with a third-party vendor to conduct independent program process evaluations for two priority programs. Subsequently, the Company has worked with the vendor to implement a review process to identify additional priority programs for process evaluations. Priorities for selection of programs for future process evaluations include significance of program impacts, program maturity (because recently introduced programs may benefit more from objective design observations), and potential instances of perceived under-performance of ongoing programs.

In 2023, Dominion Energy Virginia initiated process evaluations of the Small Business Improvement and the bundled Home Energy Assessment (HEA) and Home Retrofit programs; the evaluations were completed in early 2024. In 2024, the Company initiated process evaluations of two additional programs, the Nonresidential Custom and the Residential New Construction programs, which were finalized in 2025. The Company is committed to continual review and selection of priority programs to undergo process evaluations. These activities are currently ongoing (see Section 1.2).

Status: Completed; initial process evaluations have been conducted.

Tasks Completed (CY2024):

- See CY2024 detail in Section 1.2

Quantitative Data:

- Not applicable. See details in Section 1.2

Tasks to be Completed (Next 12 Months):

- Not applicable. Future tasks are superseded by processes in LTP25.

Continue to coordinate with stakeholders to optimize the effectiveness and reach of the energy efficiency programs.

The Company has engaged with its DSM Stakeholder Group and subgroups throughout the implementation of the LTP, on topics including the DSM planning process, opportunities to bundle programs, development of marketing and implementation plans, the use of geotargeting to reach customers in areas with low participation rates, and the Virginia cost/benefit tests. Stakeholder recommendations contributed significantly to the Company’s 2024 DSM RFP, an open solicitation for program proposals in ten categories that reflected stakeholder concepts.⁶

Additionally, the Company meets with groups outside of the stakeholder process to further enhance programs, such as the statewide network of nonprofit weatherization providers. These meetings and partnerships have resulted in continued program enhancements and improvements. The Company has also met frequently with the Department of Energy to coordinate on emerging details of initiatives to be federally funded through the Inflation Reduction Act.

Status: Completed and ongoing; the Company continues to coordinate with stakeholders on an ongoing basis

Tasks Completed (CY2025):

- Provided updates on the Company’s progress toward its program goals and invited feedback from stakeholders in meetings held on the following dates:

⁶ See Report of the 2025 Independent Monitor on the Status of the Energy Efficiency Stakeholder Process; June 30,2025; IMPACT Paradigm Associates, LLC. Virginia General Assembly website at: <https://rga.lis.virginia.gov/Published/2025/RD336/PDF>

- March 17, 2025: DSM Stakeholder Process
- March 21, 2025: Weatherization Service Providers Annual SRP Meeting
- September 15, 2025: Virtual Power Plant Stakeholder Process kick-off
- October 21, 2025: DSM Stakeholder Process

The Company has also continued to be actively engaged in numerous DSM subgroup meetings led by the independent monitor.

Quantitative Data:

- Not applicable.

Tasks to be Completed (Next 12 Months):

- Continue to coordinate with stakeholders on an ongoing basis.

1.2. Medium-Term Recommendations (2024 and 2025)

Contingent on approval by the SCC of a framework that allows flexibility to restructure the program portfolio (for the purposes of more effective customer engagement and delivery) and shift funds within the consolidated programs using an abbreviated administrative approval process, address the need to modify programs as needed to optimize performance within the regulatory and contractual framework and with appropriate stakeholder and regulatory oversight.

The Company proposed an administrative process for increased programmatic and budget flexibility between filings, which was denied by the SCC in Case No. PUR-2021-00247 (“2021 DSM Order”).

The Company made program design adjustments within the regulatory framework to address changing markets. For example, the Company requested approval in its 2022 proceeding for simple program design modifications, including a request to expand eligibility parameters of its Nonresidential Agricultural Program and add qualifying measures based on feedback from the program vendor. These were approved following the regulatory review process (approximately nine months) and introduced to customers in 2024. In the 2023 DSM Proceeding, the Company requested enhancements to the existing DSM Phase VIII Non-residential Midstream Program to diversify its program measure portfolio and align with that the program implementation vendor was operationally observing in the field. Additionally, the Company also requested in the 2023 DSM proceeding, modification to the eligibility criteria for the Phase VIII Small Business Improvement Program to remove the requirement that all participants must be privately-owned businesses with five or fewer qualifying locations within the Company’s service territory. The Company requested to remove the locations cap to ensure smaller businesses can partake in the incentives geared towards them in the Company’s DSM Phase VIII Small Business Improvement Enhanced Program.

The Company requested for new measures to be added to its Residential Income and Age Qualifying Home Improvement Program bundle in its December 2024 DSM proceeding based on stakeholder

feedback received during the 2024 Weatherization Service Provider IAQ stakeholder meeting from February 13, 2024

Status: Company completed task; Commission denied request.

Tasks Completed:

- Not applicable. Since the SCC did not grant approval of a framework to increase programmatic flexibility, the Company has not submitted any additional requests for an administrative approval process to add new measures to existing programs.
- Requested and implemented limited program design adjustments within the regulatory framework (and lengthy associated timeline therein) to address changing market needs.

Quantitative Data:

- Not applicable.

Tasks to be Completed (Next 12 Months):

- Not applicable. Future tasks are superseded by processes in LTP25.

Begin to bridge expiring implementation vendor contracts as they naturally expire. Given current program phase timelines, it is anticipated that many current vendor contracts will require interim contractual remedies to ensure continuity through the end of Phase 10.

As described above, Dominion Energy Virginia has begun a process of assessing opportunities to consolidate implementation vendor contractors and implementing those opportunities as practicable. In 2023, the Company assessed its implementation vendor contracts for each existing program through Phase 10 and consolidated some contracts where the period of performance, program designs, and program maturity aligned. These included Residential IAQ, Nonresidential IAQ, Nonresidential Prescriptive, and Residential Home Retrofit Bundles.

Status: Completed. The recommendation is incorporated into LTP25.

Tasks Completed (CY2025):

- DSM Phase 7 Nonresidential Office has been integrated into the DSM Phase 9 Nonresidential Building Optimization Program (2022 DSM Filing, with an August 4, 2023 DSM Final Order issued approving the Company’s request). Vendor contracts for both programs have been streamlined into one, overarching contract.
- The Nonresidential Window Film, Heating and Cooling Efficiency and Small Manufacturing (Phase 7) have been closed as standalone programs and integrated into the Nonresidential Enhanced Prescriptive Program Bundle. Vendor contracts for all three standalone programs have been consolidated into one overarching contract under the DSM Phase 9 Nonresidential Enhanced Prescriptive Program Bundle.
- The Residential Home Energy Assessment Program (Phase 7) has been consolidated with the Residential Home Retrofit Program. (Phase 8) The vendor contract for the Residential Home

Energy Assessment Program was closed and replaced with a new contract for the DSM Phase 8 Residential Home Retrofit Program Bundle.

- In DSM Phase 11 the Company created one overarching Residential Income and Age Qualifying Program Bundle and associated contract, integrating the Company’s Residential Income and Age Qualifying (Phase 9), Residential Income and Age Qualifying Enhanced (Phase 10), and House Bill 2789 (Heating and Cooling/Health and Safety Component; Phase 8) Programs. Without this bundle, valued and impactful HVAC measures might have been lost as the three-year HB2789 program was expiring at the time.
- The DSM Phase 11 Nonresidential IAQ Program bundle combines the Nonresidential HVAC Program (Phase 8) and Nonresidential Income and Age Qualifying Program (Phase 10). One contract is in place instead of two stand-alone contracts prior to the streamlining.

Quantitative Data:

- Total programs closed: Ten (five from DSM Phase 7, two from DSM Phase 8, one from DSM Phase 9, and two from DSM Phase 10).

Total Contracts Consolidated: Twelve stand-alone contracts have been consolidated into five overarching contracts.

Tasks to be Completed (Next 12 Months):

Continue conducting targeted process evaluations, as outlined in the short-term recommendations, to identify and implement opportunities for program improvement through the life of the DSM portfolio.

As noted above, the Company has initiated process evaluations of priority programs and anticipates selecting additional programs for process evaluation research each coming year.

In 2023, the Company completed process evaluations of the Small Business Improvement and the bundled HEA and Home Retrofit programs. In 2024, the Company initiated process evaluations of two additional programs, the Nonresidential Custom and the Residential New Construction programs, finalizing those assessments in 2025.

Status: Completed. The recommendation is incorporated into LTP25.

Tasks Completed (CY2025):

- Finalized process evaluations of the Non-residential Custom and Residential New Construction Programs.

Quantitative Data:

None. The Company received the process evaluations in Q4 2025 and is reviewing the recommendations to plan for follow-up actions.

Tasks to be Completed (Next 12 Months):

- Not applicable. Future tasks are superseded by processes in LTP25.

Continue to evaluate and pursue opportunities to offer integrated clean energy programs.

Dominion Energy Virginia solicited ideas for program innovations and new pilots through the Virginia Energy Efficiency Stakeholder Process. During the March 2025 DSM SRP Update meeting, stakeholders provided numerous concepts and ideas for new programs and measures or ideas that the Company could further explore in its 2025 DSM RFP. The Independent Monitor, who facilitated the meeting, reported eight programs or measures to be added to the Company's 2025 DSM solicitation.⁷

- Based on the latest specific Virginia legislative framework such as House Bill 2346 Virtual Power Plant, stakeholder feedback and latest industry specific market trends, the Company issued its 2025 DSM RFP, soliciting program and pilot design ideas for the following categories: Residential Battery with potential focus on HVAC load reduction (DR)
- Non-residential HVAC for small to medium sized customers (DR) (VPP)
- Residential Managed Charging (DR) (VPP)
- Residential Battery Storage Pilot (DR) (VPP)
- Residential Battery Storage Pilot for IAQ customers
- Bring Your Own Device Partner Pilot

The Company's 2025 DSM RFP was issued in July 2025 to more than 40 industry vendors. The proposals were due in August with ongoing evaluation and cost-benefit modeling analysis for the months of August, September, October and November before the Company files its 2025 DSM filing with the State Corporation Commission in December of 2025.

- 1) Proposals that may be best leveraged as enhancements to current programs,
- 2) Proposals that may require additional analysis or research prior to moving forward, and
- 3) Proposals for programs or technologies that are beyond the scope of the regulated DSM setting.

Status: Complete. The recommendation is incorporated into LTP25.

Tasks Completed (CY2025):

- Solicited ideas for new program concepts, ideas and program modifications, in the categories listed above.
- Reviewed ideas and concepts submitted by stakeholders based on their potential ability to enhance program participation, savings, customer satisfaction or other core program goals cost-effectively and within the context of the Company's current program portfolio and regulatory requirements.
- Initiated analysis of 6 potential programs and pilots for filing in the 2025DSM update, as presented to the Virginia stakeholder group on October 21, 2025.

⁷ Ibid., p, 19.

Quantitative Data:

The Company received a total of 34 proposals under the concept/idea/suggestion/recommendation segment and anticipates approximately six customer-facing new programs, including pilot programs, through the 2025 DSM regulatory process.

Tasks to be Completed (Next 12 Months):

- Not applicable. Future tasks are superseded by processes in LTP25.

Begin preparing for a new DSM plan filing that will extend the comprehensive, streamlined program structure.

Efforts to bundle and consolidate several of the Company’s programs are ongoing. In its 2023 and 2024 DSM filings, the Company proposed closing several DSM programs at the end of 2023 and adding measures from the expiring programs to current programs. Dominion Energy Virginia is planning to continue reviewing its program structure and will work closely with vendors and Cadmus to identify further opportunities for bundling. The Company employs a hybrid approach to bundling programs that allows Dominion Energy Virginia to 1) work within existing regulatory parameters, and 2) maintain program and vendor continuity during this transition process.

The Dominion Energy Virginia team (including the Corporate Communications and Customer Experience departments) continue to work closely with its external marketing and awareness firm and implementation vendors to create a more streamlined customer-facing experience that groups its DSM programs into more readily accessible program groupings. The intent of these efforts is to provide easier access to information and increase customer awareness, and to simplify customer participation and entice deeper engagement with the Company’s extensive DSM program portfolio, which offers over 1,000 program measures to its residential and nonresidential customers.

The Company hired an external vendor to complete a study of energy efficiency potential to inform stakeholders and the SCC about energy savings opportunities for Dominion Energy Virginia’s customers. The study will help inform stakeholders and future solicitations by providing estimations of potential savings by customer type and end-use.⁸ The study also provided foundational information to participants in the SCC’s energy efficiency target-setting case, PUR-2023-00227. A final order on February 27, 2025 in that proceeding established portfolio savings targets the years 2026-2028, and savings targets for the IAQ Program the years 2025-2027. The Company has updated its DSM Long-Term Plan (now LTP25) accordingly.

Status: Completed

⁸ The potential study was included as Attachment 1 to the Company’s Proposed Energy Efficiency Savings Targets Report in its June 12, 2024 filing in PUR-2023-00227.

Tasks Completed (CY2025):

- Continued to engage with stakeholders through the facilitated process and through direct communications with several key stakeholders on opportunities and challenges to achieve targets.
- Prepared an updated DSM Long-Term Plan (“LTP25”), to be filed concurrently with this Long-Term Plan Project Management Report in the Company’s 2025 DSM Update.

Quantitative Data:

- Not applicable.

Tasks to be Completed (Next 12 Months):

- Not applicable. Future tasks are superseded by recommendations in LTP25.

1.3. Long-Term Recommendations (2026 and beyond)

When planning for Phase 12 programs, issue requests for proposals that align with the more comprehensive programs outlined in the LTP.

In this recommendation, the LTP had envisioned a three- to four-year cadence of Phase filings, contingent upon the SCC approving an administrative mechanism that would have allowed more flexibility in seeking the Commission’s informed consent for mid-phase adjustments. If that mechanism had been approved, a Phase 12 filing was envisioned not to be necessary until 2027. Due to the denial of the proposed administrative mechanism, Phase 12 was filed in 2023. In the absence of the mechanism, the annual DSM proceeding has become the only available forum to request the Commission’s consideration and approval of otherwise routine program modifications. As noted previously, the Company is working with its vendors to identify program bundles that will best meet its customers’ needs and is currently presenting those bundles to customers in its marketing and outreach materials, while it continues to assess opportunities to align its vendor contracts over time. The lack of an administrative mechanism, however, prevents the Company from adding cost-effective measures to existing programs and requires the Company to comply with a more cumbersome filing requirement of adding new program filings/phases nearly every year. The associated potential inefficiencies and associated costs can impact Staff, the Company, and ultimately customers.

Status: Complete. The recommendation is incorporated into LTP25.

Tasks Completed (CY2024):

- As noted, the Company is engaging in an ongoing process to adjust its vendor contracts to facilitate a gradual shift to a more comprehensive portfolio structure through its existing regulatory framework as practicable.
- See additional details in Section 1.1.

Quantitative Data:

- As noted in Section 1.1, the Company has successfully consolidated 19 residential programs (including IAQ programs) into five customer-facing bundles and 16 business programs into three

customer-facing bundles. Table 3 shows the programs bundles by sector and the number of programs that were integrated into each.

Table 3. Bundled Programs Summary

Bundle Type	Bundle Name	Number of Programs
Home Customers	Rebates & Discounts on Energy-Efficient Equipment & Appliances	4
	Home Energy Audit Bundle	4
	Rewards for Saving Energy Bundle	4
	Income and Age Qualifying (IAQ) Programs Bundle	3
	Other Approved Programs Bundle	4
	Total	19
Business Customers	Programs for Every Industry Bundle	4
	Customized Energy Solutions for Your Business Bundle	11
	Other Approved Programs Bundle (Business)	1
	Total	16

Tasks to be Completed (Next 12 to 24 Months):

- Not applicable. Future tasks are superseded by processes in LTP25.

File a future DSM portfolio in 2027 that aligns with the comprehensive program structure outlined in this Plan to the extent practical.

As described above, the Company has begun a process of assessing opportunities to consolidate its programs under a more streamlined portfolio and implementing those opportunities as practicable. The Company continues to review new measures that are being considered for filing and evaluate how best to include these into program bundles. This will sometimes require the Company to refile existing programs to incorporate new measures and wait for SCC approval before they can be deployed to customers. This results in a lagging regulatory approval process that delays incorporation of new measures and programs into its portfolio by anywhere from 12 to 18 months.

The Company will also reevaluate bundles and programs as new measures and technologies become available on the market to ensure comprehensive programs continue to be offered to customers.

Status: Complete. The recommendation is incorporated into LTP25.

Tasks Completed:

- As noted, the Company and its customer awareness vendor are engaging in an ongoing process to adjust its current portfolio structure via presentment through its existing regulatory framework as practicable.

Quantitative Data:

- Not applicable.

Tasks to be Completed (Next 12 to 24 Months):

- Not applicable. Future tasks are superseded by processes in LTP25.

Capture the full value of energy efficiency by deploying it as a capacity resource.

The Company is continually looking for opportunities to improve the stability and flexibility of its grid and systems. Through RFPs and pilot outreach, the Company is exploring new opportunities and measures in both energy efficiency and demand response to help reduce energy usage and assist reliability during peak demand hours. As part of the stakeholder process, the Company is evaluating additional opportunities to use AMI data and geotargeting to reduce energy consumption and increase stability across the grid, and recently received approval for new programs that launched in 2024, such as the Peak Time Rebate program. This can also reduce the need for additional generation capacity during peak demand periods.

In Phase 13, the Company extended its Distributed Generation Program and also received approval for a Non-residential Curtailment program.

Status: Complete. The recommendation is incorporated into LTP25.

Tasks Completed (CY2024):

- Reviewed pilot program suggestions for measures or program ideas that can advance this objective. See Section 1.2 above for details.

Quantitative Data:

- Not applicable

Tasks to be Completed (Next 12 to 24 Months):

- Not applicable. Future tasks are superseded by processes in LTP25.

1.4. Overarching Progress Metrics: Medium Term (2024 and 2025)

This section describes the Company’s progress on the metrics outlined in Section 7.2 of the Long-Term Plan—with quantitative data where feasible—associated with each of the three overarching strategies of the LTP, which has now completed the medium term (2024 to 2025) of its implementation.

Optimize Program Delivery and Customer Satisfaction:

- Streamlined program portfolio is in place and operational:
 - **Status:** nearing completion as described above.
- Mid-phase program updates submitted as necessary through Advice Letter filings:
 - **Status:** not applicable. The Company’s request for an administrative process was denied.
- Increased customer participation throughout the service territory and across the portfolio:
 - **Status:** Ongoing and trending positively. Table 4 provides preliminary reported program participation by sector between 2022 (the first year of VCEA programming) and 2025 (as reported June 30, 2025). As shown, participation in the Company’s DSM programs has increased year-over-year in each year 2022 and 2023. Full year results for 2025 are not yet available.

Table 4. Program Participation Trend by Sector (2022-2024)*

	2022	2023	2024	2025**
Residential	333,301	357,260	658,687	481,527
Nonresidential	1,407	2,218	37,587	42,151

* Evaluation, Measurement, and Verification Report for Virginia Electric and Power Company (Dominion Energy), June 15, 2023, June 12, 2024, and June 16, 2025, "DEV DSM Dashboard," Prepared by DNV Energy Insights USA Inc. (DNV)

** 2025 Year-to-date figures represent *reported* participation. Source: DEV DSM Mid-Year Results, 06/30/2025

- Energy savings achieve annual goals outlined in this Plan and cumulative VCEA savings targets:
 - **Status:** In progress. At the end of 2024, the Company had achieved 1.62% energy savings relative to 2019 jurisdictional sales (43.2% of its 2024 VCEA energy savings target), with one year remaining in the initial compliance period. Table 5 shows Dominion Energy’s evaluated energy savings to date. Savings results for 2025 are not yet available.

Table 5. Achieved Energy Savings Compared to Goals

	2022	2023	2024	2025
VCEA Cumulative Savings Requirement (%)	1.25%	2.5%	3.75%	5%
VCEA Energy Savings Targets (MWh-yr)	852,892	1,705,783	2,558,675	3,411,567
Cumulative Net Energy Savings Results to Date (MWh)	837,387	969,372	1,106,256	NA
Cumulative Net Energy Savings (%)	1.23%	1.42%	1.62%	NA
Cumulative Net Energy Savings (% of target)	98.4%	56.8%	43.2%	NA

Source: Evaluation, Measurement, and Verification Report for Virginia Electric and Power Company (Dominion Energy), June 16, 2025, page 2, Prepared by DNV Energy Insights USA Inc. (DNV)

- Progressive alignment of implementation vendor contracts with program phases in place:
 - **Status:** In progress. The Company has consolidated 12 standalone contracts into five overarching contracts.
- Ongoing research and development process in place to test innovative pilots:
 - **Status:** In progress and ongoing. The Company conducts an annual process to solicit and review new program concepts, pilots, and other program modifications based on their value to customers, the Company and the overall DSM portfolio. This process is described in greater detail in Section 1.2.
- Potential study update initiated and executed to inform future filings:
 - **Status:** completed. The company is currently reviewing and analyzing the results of the potential study to inform future portfolio and program planning.
- Programs modified through administrative approval process as needed:
 - **Status:** not applicable. The Company’s request for an administrative process was denied.

Expand efforts to Improve General Awareness of the Company’s Energy Efficiency Programs and the Benefits of Energy Efficiency:

- Marketing strategy aligned with comprehensive program portfolio:
 - **Status:** Successful and ongoing.
- Documentation of increased program awareness, engagement, and satisfaction:
 - **Status:** In progress and ongoing. The Company’s initial efforts have increased program awareness. Cadmus conducted general population surveys in 2021 and again in 2024 to assess the degree to which the Company’s general awareness campaign has influenced customer awareness of Dominion Energy Virginia’s DSM programs. As shown in Table 6, awareness among residential customers has increased by 33%, while nonresidential customer awareness has increased by 22% from 2021 to 2025.

Table 6. Dominion Energy Customer Awareness of DSM Programs

	2021	2024	% Increase
Residential Awareness ¹	39%	52%	33%
Residential Familiarity ²	19%	34%	79%
Nonresidential Awareness ¹	15%	18.3%	22%
Nonresidential Familiarity ²	9%	11.4%	27%

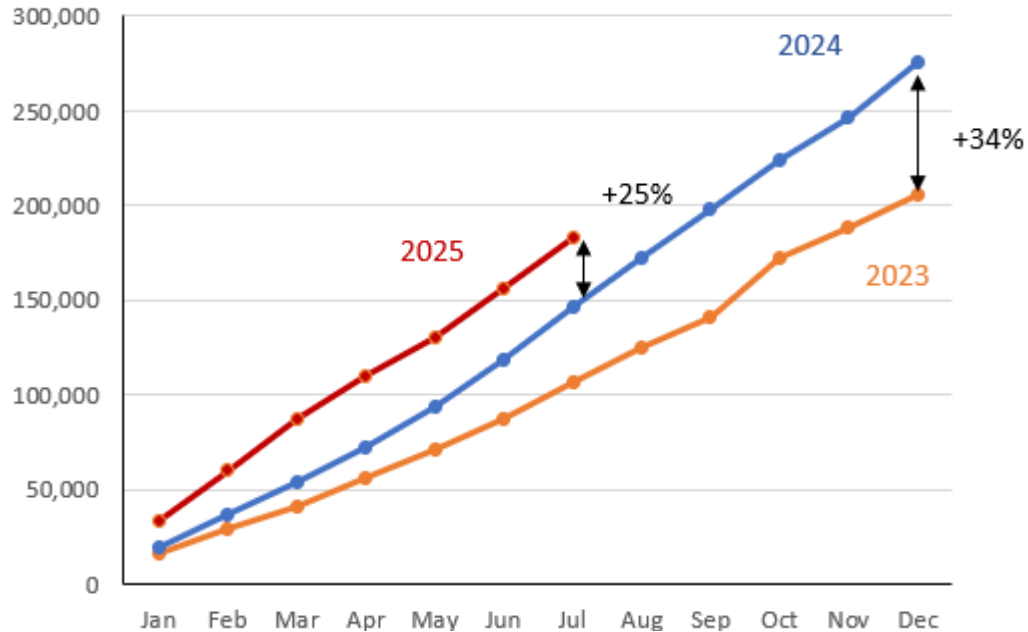
1 Percentage of respondents answering “yes” to survey question: Over the past year, have you heard anything about Dominion Energy programs or rebates that help customers reduce their energy use and save money on their energy bills?

2 Combined total percentage of respondents answering “very familiar” and “somewhat familiar” to survey question: How familiar are you with Dominion Energy programs or rebates that help customers reduce their energy use and save money on their energy bills?

- Dominion Energy Virginia fielded a Voice of the Customer Survey in June 2025, asking substantially identical questions about customer awareness, revealing 59% awareness (among all customer groups) of Company programs through awareness campaigns

- Additionally, customer engagement with Dominion Energy Virginia’s programs has increased over time. Figure 1 displays a 25% year-over-year increase in 2025 YTD website traffic compared to 2024, as well as monthly trend increases since 2023.

Figure 1: DSM Site Pages: Monthly Users (Cumulative)



Source: DSM Campaign Performance and Site Metrics: July 2025 Data – Digital Analytics, West Cary Group, August 21, 2025

- The Company’s customer marketing efforts demonstrate this increase in engagement:
 - Site traffic on Save Energy related site pages has increased from 17,173 site pages/month in March 2024 to 26,785 pages/month in July 2025, a 56% increase in 16 months.
 - Summer 2025 digital campaigns delivered roughly 26 million impressions and generated 318,000 clicks.
 - Year-to-year performance continues to trend positively. From June 2024 through June 2025, performance has yielded the following:
 - An increase in impressions from 9,508 to 19,989 per month, a 110% year-over-year increase.
 - An increase in clicks from 2,293 to 3,223 per month, a 41% year-over-year increase.

Enhance and Maintain a Framework for Assessing, Improving, and Tracking Program Operations:

- Process evaluation recommendations tracked and implemented as appropriate and feasible:
 - **Status:** Successful and ongoing. The Company has developed and maintains a tracking system to document the status of its actions to implement process evaluation recommendations. Dominion Energy Virginia has implemented the recommendations

provided in its initial process evaluations conducted for the HEA/Home Retrofit and Small Business Improvement programs.

- Increased trade ally participation and local organizational partnerships documented:
 - **Status:** In progress and ongoing. The Company has grown its trade ally network by 263 members since 2022, as shown in Table 2. The Company has not yet documented its local organizational partnerships. The Company continues to work with key state departments and other industry stakeholders.

1.5. Remaining tasks to fully implement the Long-Term Plan

The Company has made considerable progress reviewing, analyzing, and implementing the recommendations in the Long-Term Plan. The Company has acted where it believes it is feasible, practicable, and in the best interests of its customers to implement the LTP’s recommendations within the context of its existing program operations, based on existing contractual obligations with its numerous program implementation vendors and, more importantly, the regulatory framework in the state of Virginia. It is worth reiterating that the LTP reflected a snapshot in time and will continue to evolve based on the latest industry, regulatory and market trends, and as Dominion Energy Virginia’s DSM programs progress and mature. The Company expects to continue pursuing a shift toward a more streamlined portfolio structure and to continue its efforts to increase customer awareness of its programs. However, absent the Commission’s approval to establish an administrative process allowing it to adjust programs as needed to respond to market changes, the Company will continue to navigate this process via the existing regulatory framework and associated time schedule under the annual DSM rider update.

Over the next two years, the Company expects to continue to execute the recommendations outlined within the Long-Term Plan, adjusting to the market and other influences, while continuing to work with stakeholders to keep them informed and to solicit their feedback wherever appropriate.

