



## EQUITY WORKING GROUP MEETING MINUTES

Tuesday, March 21, 2023  
Virtual Meeting: Zoom

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**Equity Working Group Members Present:** Charlie Harak, Brooks Winner (representing Cammy Peterson), Brian Beote (representing Elliott Jacobson), JoAnn Bodemer, Maggie McCarey, Stephanie Terach, Mary Wambui, Cindy Luppi, Katelyn Mazuera, Amy Boyd, Sonakshi Saxena, Maggie Downey

**Equity Working Group Members Absent:** None

**Other Attendees:** Adrian Caesar, Michelle Keller, Margie Lynch, Alissa Whiteman, Leah Cohen, Lucy Fox, Christopher Lavelle, Steve Menges, Molly Fairchild, Bernetta Morton, Chris McClellan, Melanie Coen, Gabriel Shapiro, Danilo Morales, Kai Palmer-Dunning, Anxhela Mile, Brandy Chambers, Zack Lippert, Rouwenna Altemose

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### 1. Call to Order

McCarey, acting as Chair, called the meeting to order at 11:34 AM.

#### *Equity Working Group Membership*

McCarey stated that the Equity Working Group Charter allots three openings for non-EEAC or program administrator representation within the Group. McCarey said that Cindy Luppi and Anxhela Mile are currently Equity Working Group participants and that Eugenia Gibbons was a participant in the past. McCarey also said that other members of the public expressed significant interest in the three seats. Whiteman shared the list of candidates for the three open seats and McCarey requested input on which stakeholder interests should be represented by the three open seats. McCarey clarified that all candidates would be valued participants in Equity Working Group meetings regardless of whether the candidate is chosen for one of the three seats, and that others are also welcome to participate in meetings.

Bodemer asked how the Equity Working Group would determine membership since the list of potential members is comprehensive and selecting three members from the list will be difficult. Bodemer commented that Cindy Luppi and the Conservation Law Foundation have been

productive Equity Working Group participants and the synergy should continue. Bodemer suggested that a Community First Partner be represented within the Equity Working Group and asked if the Group is limited to three external participants. McCarey replied that the Charter calls for three external participants, but the Equity Working Group can still engage with others since its meetings are public. McCarey said the Equity Working Group should come to consensus on the constituents or areas that require consistent representation, such as Community First Partners, renters, or small businesses.

Luppi agreed with Bodemer that the list of potential candidates is comprehensive. Luppi said that workforce development, municipal leadership, and property owners should be priorities for representation, especially since renters seemed to lack representation on the candidate list. Luppi added that the Sustainability Outreach Coordinator in Salem has valuable experience that could support the Equity Working Group.

Wambui said that all candidates are doing equity-related work, so priority areas for representation are key. Wambui commented that the programs have been unable to reach renters, especially in environmental justice communities, because landlords decide whether to decarbonize buildings. Wambui said that the Massachusetts Landlord Association's interest in the Equity Working Group is a great sign. Wambui also said that workforce development is a key area since it impacts the entire clean energy industry.

Winner asked if interested members could deliver short statements during the next Equity Working Group meeting. McCarey replied that each interested member provided written statements of interest. Winner said that the Equity Working Group Charter did not define term lengths. McCarey said that the EEAC Bylaws specify that the term length for EEAC subcommittee members is two years. Winner emphasized the importance to represent both renters and landlords on the Equity Working Group and said that Doug Quattrochi, a member of the Massachusetts Landlord Association, is very familiar with energy efficiency programs. Winner said that workforce development and Community First Partnerships are also priorities, so the Emerald Cities Collaborative would be a good member. Winner said that Nat Romano at Ener-G-Save works with the Community First Partnership lead in Springfield, Susan Olshuff, who implements an intersectional approach to housing justice and public health. Winner said that choosing someone engaged in the Springfield Community First Partnership would provide diversity in terms of geographic representation.

Boyd agreed that the list of candidates is impressive and distinguished holding a seat on the Equity Working Group from being an active participant. Boyd recommended that the selected candidates should represent interests and constituents not represented by current Equity Working Group members, like landlords, program implementers, Community First Partners, and residents of Western Massachusetts. Boyd also said that workforce development is a priority.

Harak suggested that the Equity Working Group encourage all candidates to actively participate in meetings. Harak said that participation barriers and difficulty engaging tenant groups make the Massachusetts Landlord Association a good candidate. Harak said that workforce development is an important topic given goals for heat-pump installations. Harak added that participation by the Community First Partner in Springfield could facilitate diversity in geographic representation.

Beote agreed that engaging property-ownership entities will help reach renters, which is why the Low-income Energy Affordability Network presented to the Massachusetts Landlord Association to increase renter participation. Beote said that the Emerald Cities Collaborative would effectively support workforce development.

McCarey identified a gap in the representation of small-business customers on the Equity Working Group due to Cindy Arcate's departure from the EEAC.

Lynch suggested that Equity Working Group members should actively contribute to Equity Working Group discussion, but recommended that the PAs can effectively communicate perspectives of their vendors to avoid redundancy in representation.

Luppi supported Harak's comments about encouraging active participation to understand different perspectives and build relationships. McCarey said that the Equity Working Group's status as an EEAC subcommittee will foster public participation.

Saxena suggested that language-isolated customers require representation on the Equity Working Group. Saxena also suggested that customer perspectives and real-time feedback on programs would be valuable to the Equity Working Group. McCarey agreed that language-isolated customers should be represented.

Morton supported Harak's comments that members of the public can engage with the Equity Working Group whether they are appointed to the Equity Working Group or not. Morton stated that she received an Innovation and Capacity Building Grant from the Massachusetts Clean Energy Center (Mass-CEC) through its Empower program to develop streamlined pathways for low- and moderate-income customers and environmental justice communities to participate in all clean energy programs. Morton said that the pilots for streamlined pathways will inform solutions to overcome participation barriers and offered to provide updates to the Equity Working Group.

### ***Equity Working Group Cochairs***

McCarey announced that two Equity Working Group members, Wambui and Winner, indicated that they want to serve as co-chairs for the Equity Working Group. Wambui encouraged others interested in serving as co-chairs to express their interest.

Harak commented that Wambui and Winner would be great co-chairs and supported their appointments. McCarey agreed and Wambui and Winner were appointed as co-chairs of the Equity Working Group by consensus.

## **2. Equity Targets**

McCarey stated that detailed review of 2022 Equity Targets results, progress toward increasing participation for underserved customer groups, and programmatic changes to target underserved customers would follow discussion of data issues identified by the PAs.

### ***Discussion of 2022 Equity Targets Results – Renters***

Lynch shared renter performance data for 2022 compared to baseline participation levels and clarified that renter data are tracked in a renter-specific Equity Target in addition to the Community First Partnership participation targets.

Wambui asked if the number of completed home energy assessments (HEAs) and reasons why customers do not implement measures identified during HEAs are tracked. Wambui highlighted the importance of understanding barriers to improve program design and encourage participation by low- and moderate-income customers. Chambers replied that baselines are important to determine success, and though the Equity Targets were set during the 2022-2024 Three-Year Plan development process, data points beyond participation would provide meaningful context. Chambers said that the PAs track HEAs by zip code and town, but lead vendors only track health and safety barriers to completing projects. Customer costs, lack of interest, and time constraints are other potential reasons why customers do not complete projects. Chambers said that the PAs can examine methods to make participation data more beneficial if it does not require a large, incremental effort, such as reporting on language preferences selected by customers. Wambui asked if Community First Partners could request HEA and participation data from the PAs. Chambers responded that the PAs provide participation data to the Community First Partners. Menges noted that the PAs are subject to standards for data aggregation, which limits the granularity of data that is shared. Wambui suggested that the PAs engage with the city of Lawrence to provide participation data, which the city has been unable to access. Winner seconded Wambui and said that other municipalities participating in the Community First Partnerships have been unable to access participation data.

Winner asked if the PAs establish participation baselines for each Community First Partner. Chambers confirmed that the PAs help each municipality that participates in the Community First Partnership set goals, but baselines are based on total participation within each town.

Boyd asked the PAs to define what constitutes serving a customer. Chambers responded that the metric did not clarify whether this meant customers received weatherization or light-touch measures like LED bulbs, so the specific definition varies. Participation by renters and language-isolated customers attributed to the installation of retail measures is not counted, but energy-saving kits for renters should be included in tracking. Chambers said that the PAs need to better define “served” in order to compare participation effectively.

Lynch commented that the Community First Partnerships were basically established in 2019, but metrics of success did not align with the goal of reaching underserved customers. Lynch said the Partnerships were developed to provide community-based solutions to serve renter, language-isolated, low- and moderate-income, and small-business customers, but no data was previously collected to determine progress in serving underserved customers. Lynch said the Equity Targets were created to achieve such data tracking. Lynch said that participation by moderate-income customers has not increased and no language-isolated customers have been served, but the latter issue is due to a data-tracking issue.

Shapiro said that self-identification of renter status is captured through some program channels and hypothesized that programs are serving more renters. Shapiro said that the PAs are working

through a process to validate whether served units are renter-occupied using data provided by energy specialists. Shapiro noted that various participation pathways, including web forms and phone intake, capture preferred language for customers. Shapiro said that 58% of Lawrence leads indicated Spanish as their preferred language, so there are disparities in data reporting.

Shapiro explained that the PAs will need to incorporate vendor data, energy specialist data, and community-generated data to ensure accurate reporting and baselines. Chambers added that evaluation vendors may discover more renter participation through analyzing participation by accounts with frequent turnover, which indicates renter occupation. McCarey said that the Equity Working Group will be interested in these results.

Winner asked the degree to which equity goals are communicated to vendors, because contractors aware of broader goals would likely ask appropriate questions and track information correctly. Winner also asked if assessment of recent program data suggests that bonus payments for serving underserved customers would improve performance. Chambers confirmed that program goals are communicated to vendors and the PAs stress the importance of accurate tracking, but there is ongoing training to ensure that customer intake and data tracking are performed correctly. Chambers stated that home performance contractors receive bonuses for each weatherization project completed in renter-occupied buildings and Mazuera said that similar bonuses apply for moderate-income projects. Lynch commented that HVAC upgrades are important for customers in environmental justice communities.

Wambui mentioned that the Equity Working Group, EEAC, and PAs need to be thoughtful about how to devise better Equity Targets and metrics for the 2025-2027 Three-Year Plan. Wambui said that it was hard to determine the first set of metrics, but it represented meaningful progress toward tracking and increasing participation among underserved groups. McCarey encouraged the PAs to explore methods for validating baselines and improving data tracking.

#### ***Discussion of 2022 Equity Targets Results – Language Access***

Lynch explained that the reported Equity Targets indicate zero language-isolated customers were served within Community First Partnership municipalities. Lynch said that development of the Language Access Plan and offering HEAs in non-English languages was meant to increase participation by language-isolated customers.

Chambers said that the previous versions of data-tracking systems did not track language, but improvements will be implemented in 2023. McCarey asked if the PAs anticipated issues with tracking preferred language. Chambers confirmed that the PAs anticipated these issues, but software limitations prevented them from rectifying the issues mid-year.

Lavallee summarized the five-phase process for developing the Language Access Plan. Lavallee said that the initial phases focus on educating vendors about program offerings and conducting market research to remove language-access barriers. The following phases involve implementing strategies, policies, and marketing plans, and collaborating with Community-First Partners and other customer-facing organizations. Lavallee added that training is a crucial aspect to ensure that lead vendors understand resources and best practices for serving language-isolated customers.

Mazuera noted that the PAs offer customer translation services and HEAs in Spanish, with Portuguese translation being added by the end of March. Mazuera also noted that Eversource is launching a multimedia-marketing campaign in Spanish and Portuguese.

Altemose, the Co-Founder of All-In Energy, stated that program vendors have successfully collaborated with Community First Partners on efforts to translate program materials and provide interpretation. Altemose said that one vendor visited over thirty Spanish-speaking businesses in Salem which resulted in three completed projects, and fifty Spanish-speaking businesses were visited in Lawrence resulting in five completed projects. Altemose said that the Community First Partner in Malden is developing a pocket translation tool in Spanish, Portuguese, Arabic, and other languages. Altemose indicated that outreach in Mandarin and Vietnamese was conducted in Quincy and Randolph, which motivated two businesses to complete projects. Altemose highlighted the importance of collaboration with Community First Partners to encourage participation. Altemose commented that outreach to Spanish-speaking residents of Lawrence has been a priority and 58% of customer leads in Lawrence indicated Spanish as their preferred language. Altemose said that there is high interest in translation and interpretation services within municipalities participating in the Community First Partnerships, as nine languages beyond Spanish have been requested for translation. Altemose characterized the challenges of providing translation beyond English and Spanish since only 1.3% of customer leads did not indicate English or Spanish as preferred languages and some PA data systems do not support other languages. Altemose said that comprehensive services can be provided once system improvements are implemented.

Lynch suggested that the Limited English Proficiency Customer Journey Study will identify barriers and inform strategies. Lavalley said that the study results will be shared with the Language Access Plan vendors. Lynch recommended that the PAs share underlying study data with the vendors. Lynch said that the PAs should describe efforts to diversify the workforce to provide language support throughout the entire customer journey. Lavalley confirmed that workforce diversification is included in the Language Access Plan, but the near-term focus is the customer journey and current program offerings. Mazuera said that the PAs conducted two supplier diversity summits in 2022 and plan to do the same in 2023. Mazuera added that the PAs delivered a presentation on workforce development efforts and hiring of diverse customer service representatives. McCarey said that MassCEC can provide additional workforce development updates.

Morton commented that language-isolated customers face difficult barriers since even English-speaking customers experience difficulties in participation. McCarey said that the Customer Journey Study should provide valuable recommendations for improving participation.

Wambui said that Lowell has communities that speak Khmer and Swahili, so the Language Access Plan must target specific communities instead of broadly applying outreach strategies in Spanish and Portuguese. Lavalley agreed and said that Spanish and Portuguese are a focus due to state demographics, but the Language Access Plan will seek to provide comprehensive services for less common languages as well.

Winner commented that the supplier diversity summits covered language diversity among program vendors in addition to best practices for hiring and retention. Winner said that the PAs should coordinate initiatives such as the Clean Energy Pathways internships and Community First Partners to support workforce development and language access. Mazuera responded that the Language Access Plan will direct the PAs to assess languages spoken by both PA staff and program implementers.

Shapiro said that customer intake was customized for each Community First Partner to provide translated program materials and additional language options when calling into Mass Save call centers. Shapiro said the customization aims to prevent upfront participation barriers in the event that program staff do not have translated materials. Shapiro said that some language-isolated customers have performed weatherization upgrades, so the PAs will assess the data and improve data reporting.

### ***Discussion of 2022 Equity Targets Results – Small Business Weatherization***

Lippert stated that the PAs were disappointed by underperformance in small-business weatherization and said that the program is transitioning from lighting-driven savings to comprehensive projects. Lippert said that prescriptive weatherization offerings for air sealing and insulation, which have streamlined review and engineering processes, will ease participation for customers. Lippert noted that weather stripping and basement insulation may be included in prescriptive offerings, in addition to a Custom Express tool which can simplify savings calculations in unique buildings. Despite underperformance, Lippert said that most reported small-business weatherization projects came through the prescriptive weatherization offerings which can also cover up to 100% of project costs. Lippert said that contractors working in the Small Business program are not accustomed to identifying new weatherization opportunities, but some lead vendors are partnering with weatherization firms or hiring experts in building envelope technologies. Lippert said that the PAs are developing online training materials that cover the basics on marketing and identifying weatherization opportunities and barriers, while more advanced trainings will be offered in person. Lippert said that costs, long wait times, and renter status for small business customers are challenges. However, Lippert expressed optimism that the new weatherization pathways, training, lead vendor efforts, and increased marketing will result in improved performance.

McCarey asked if independent insulation contractors (IICs) that serve the Residential sector also serve small-business customers. Lippert replied that these contractors have not participated in the Small Business program since the weatherization offerings are new, but that the PAs want to connect lead vendors that serve small businesses with IICs who provide residential weatherization. Lippert added that many small businesses have residential-style construction and would benefit from weatherization upgrades.

Wambui commented that her work has focused on achieving equity in the energy space for many years, but the level of stakeholder engagement in programs indicates an unprecedented level of interest in equity. Wambui said that significant effort has been put into delivering services to small-business customers and encouraged Equity Working Group members to engage other interested parties to drive further progress.

### **3. Moderate-Income Program**

Mazuera stated that the PAs conducted a meeting to discuss improvements to the Moderate-Income program, which yielded many helpful recommendations, Mazuera said the PAs will regroup next week to discuss outcomes and next steps. McCarey suggested that the PAs share a summary of findings and provide a more robust update during the Equity Working Group meeting on May 8<sup>th</sup>.

### **4. Adjournment**

McCarey announced that she is leaving the Department of Energy Resources (DOER), so this would be her last Equity Working Group meeting. McCarey thanked everyone and encouraged the Group to continue its amazing work.

Wambui expressed gratitude for McCarey's contributions to the Equity Working Group. Wambui said that she and others have always advocated for equity and it was during McCarey's time at DOER that much equity work began to take shape.

McCarey, acting as Chair, adjourned the meeting at 1:31 PM.

#### **Meeting Materials:**

- Meeting Notice
- 2022 Equity Targets Results Presentation