



EQUITY WORKING GROUP MEETING MINUTES

Monday, August 7, 2023
Virtual Meeting: Zoom

Equity Working Group Members Present: Brooks Winner, Maggie Downey, Mary Wambui, Alexis Washburn, Stephanie Terach, Margie Lynch, Mary Wambui, Kyle Murray (for Amy Boyd), Sonakshi Saxena, Michelle Keller, Jo Ann Bodemer, Cindy Luppi, Doug Quattrochi, Lucy Fox (for James Collins), Jhenny Saint-Surin

Equity Working Group Members Absent: Charlie Harak

Other Attendees: Adrian Caesar, Alissa Whiteman, Ina Dasso, Fangxue Zheng, Aladdine Joroff, Alex Pratt, Alex Train, Alison Donovan, Andrea Salazar, Anxhela Mile, Bernetta Morton, Brian Beote, Chris Lavallee, Cody Piggot, Danilo Morales, Emily Lamb, Degen Larkin, Emma Zehner, Mamadou Balde, Erin Waddles, Gabe Prendergast, Sherdyl Fernandez-Aubert, Kim Dragoo, Leah Cohen, Lori Kenschaft, Martha Grover, Rouwenna Altemose, Sam Nigro, Seth Federspiel, Susan Cohen, Melanie Coen

1. Call to Order

Whiteman, acting as Chair, called the meeting to order at 11:03 AM.

2. Equity Working Group (EWG) Updates and Public Comment

There were no updates from the EWG or public comments.

3. Community First Partnerships and Language Access Plan

Background: Community First Partnership and Language Access Plan

Downey, on behalf of the program administrators (PAs) provided background information on the Community First Partnerships (CFPs), described the evolution and functions of the program, and listed all 52 partner communities. Lavallee reviewed efforts to improve language access including hiring of bilingual staff, Spanish and Portuguese home-energy assessments (HEAs), and outreach activities executed by CFPs. Lavallee also described the timeline for the Language Access Plan and preliminary findings from focus groups conducted to assess community needs.

Winner asked Lavallee to elaborate on the finding that the CFPs should be mindful of community-based organizations (CBOs) with which they collaborate. Lavallee replied that CBOs are generally trusted, but it is important to vet them, understand where customers receive information, and understand who customers trust. Wambui said that some rhetoric at city council meetings in Lawrence and Lowell suggests that some CBOs do not have good reputations or do not engage in practical work to drive positive change in communities.

Luppi noted that the Green Justice Coalition supports collaboration with CBOs in order to reach community members. Luppi described distrust of public programs in underserved communities, particularly among immigrant populations. Luppi said that this distrust has grown during Donald Trump's tenure as President and people are reluctant to share information in order to participate in public programs.

Equity Targets for Partnerships and Language Access

Lynch, on behalf of the EEAC Consultants, reviewed 2022-2024 equity targets specific to strategic partnerships and language access within the Mass Save programs.

4. Panel: Community First Partnership (CFP) and Language Access Plan

Whiteman introduced Larken, Fernandez-Aubert, Train, Pratt, and Zheng, participants in the CFP who would describe their experiences supporting the CFP initiative and strategic improvements.

Degen Larken (City of Boston)

Larken commented that the Boston CFP has helped guide language-isolated residents and business owners through Mass Save programs. Larken said that the CFP targets environmental-justice communities, but there are opportunities to further improve language access. Larken said that identifying language needs in priority neighborhoods has allowed the Boston CFP to both standardize and improve outreach and provide customer support. Partnerships with CBOs and city departments have been an essential tool for expanding reach and building trust. Larken said that the Boston CFP collaborated with the PAs by providing in-person, on-demand interpretation services during "Main Street" efforts. In addition, cultural liaisons accompanied contractors while canvassing communities. Larken suggested that these strategies require coordination with and resources from the PA. Larken made several recommendations for avoiding customer attrition and improving program implementation:

- Include language-specific phonelines for each area to tailor customer-support services
- Provide wraparound language support to provide comprehensive language access, which includes both on-call support and translation of all program materials
- Collaborate with community liaisons to facilitate trust with community members, especially given the prevalence of scams
- Simplify income-verification processes and allow verification through methods beyond enrollment on discounted-energy rates
- Conduct comprehensive audits
- Disburse rebate funds prior to project completion to mitigate financing barriers

- Create a central portal for customers to ask questions and get information
- Enable third parties to guide customers through programs, similar to the “quarterbacking” model used with income-eligible customers

Larken suggested that these improvements will support many customers, even those without barriers to language access.

Sherdyl Fernandez-Aubert (Berkshire Regional Planning Commission) BRPC serves six communities as part of its CFP

Fernandez-Aubert indicated that Larken’s comments regarding distrust of public programs hold true for Hispanic population served by the Berkshire Regional Planning Commission. Fernandez-Aubert emphasized the importance of building a network of trusted partners and recommended a cultural-training toolkit to better enable CFPs to build trust with underserved communities. Fernandez-Aubert said that pairing translation services with community action agency (CAA) services and Main Street efforts will greatly benefit rural communities that also face language-access challenges. Fernandez-Aubert noted that recent success serving Spanish-speaking and low- and moderate-income populations is attributable to an increase in translated materials and collaboration between CFPs and CBOs. Fernandez-Aubert said that customer awareness of Mass Save has grown over the past year, but customer attrition and upfront costs for projects have been especially problematic for moderate-income customers. Fernandez-Aubert also suggested that the PAs fund more than 10 hours of work by energy advocates as significant effort is required to organize events and support multiple communities.

Alex Train (Chelsea Department of Housing and Community Development)

Train echoed Fernandez-Aubert’s point that CFPs require additional resources for program outreach and funding. Train stated that canvassing with CBOs, working directly with residents, organizing events, and supporting other CFP efforts in Chelsea, Revere and Winthrop necessitate commitment comparable to that of full-time employment. Train said that expanding interpretation services does not supplant the need to hire a local, bilingual member of the community as an energy advocate. Train said that low- and moderate-income customers, particularly renters, face significant barriers such as project financing that wealthier customers do not. Train commented that customers need to verify income through eligibility for other government-aid programs, which precludes many residents from income verification due to apprehension of government programs. Train said that the PAs need to address these deficiencies in order to scale programs and decarbonize more homes and small businesses. Train noted that the establishment of CFPs has been an unprecedented step in the right direction, so further improvements will help bring benefits to marginalized communities.

Alex Pratt (Malden Department of Housing and Community Development)

Pratt indicated that eight different languages are spoken by 5% or more of Malden residents, making it the most language-diverse city in Massachusetts. Pratt said that about half of Malden residents speak a language other than English at home which creates communication challenges. Pratt said that the CFP has provided resource capacity through the energy advocate work, which has been combined with a position for housing rehabilitation. Pratt said that HomeWorks Energy, the primary home-performance contractor (HPC) for Malden, has helped expand outreach and build greater trust among the community. Pratt also said that cobranding of

materials has facilitated greater trust. Pratt suggested that Mass Save programs need to ensure comprehensive access to programs in order to meet goals. Pratt listed changes required to improve programs:

- Hire multilingual program staff to better engage with customers
- Apply an intersectional lens to serving language-isolated groups, since common issues like split incentives and customer attrition impact them
- Remove the requirement that customers participate in other government-assistance programs in order to participate in Income Eligible programs
- Use area-median income (AMI) instead of state-median income (SMI) to determine eligibility for enhanced incentives. This will account for variances in cost-of-living across different communities
- Scale up goals for Income Eligible programs in accordance with statewide-climate goals

Pratt said that many language-isolated customers are skeptical of heat-pumps due to lack of information, but PAs take weeks to approve translated materials; contrarily, the Malden CFP is able to produce translated materials within 1-2 days. Pratt acknowledged the need for PAs to oversee marketing, but this needs to be balanced with ensuring access for community members. Pratt urged the PAs to empower CFPs in order to meet the needs of their respective communities.

Fangxue Zheng (Quincy Asian Resources)

Zheng corroborated others' comments regarding barriers for multilingual communities. Zheng said that Quincy has many Chinese residents speaking Mandarin and Cantonese, so there is distrust of Mass Save programs due to communication and information barriers. Zheng said that All-In Energy is working with the CFP to improve language access. Zheng added that the cultural norm to share word-of-mouth among acquaintances can result in the spread of misinformation about Mass Save. Zheng said that Quincy Asian Resources hosts two of the largest cultural events in Quincy that have yielded up to 15,000 participants. Zheng said a recent survey indicates that Quincy residents have limited information about heat-pumps and Mass Save programs, even if they were considering HVAC (heating, ventilation, and air conditioning) upgrades. To promote customer awareness, Zheng noted that the Quincy CFP conducted two focus groups, one for residential customers and one for small-business customers, and plans to conduct more to increase customer awareness and trust. Zheng said that funding for workshops, focus groups, and organizing events are required to support CFP efforts.

Martha Grover (City of Melrose)

Grover commented that the CFP has provided comprehensive support and focus on weatherization, heat-pumps, low- and moderate-income customers, small businesses, and language access. Grover said that the PAs can improve the cost-effectiveness analysis of heat-pump costs for gas customers by considering more stable electricity rates provided by community aggregation. Grover recommended that the threshold for moderate-income eligibility be increased to 120% of SMI. Grover said that the ABCD pilot which allows HPCs to serve all customers has streamlined program delivery and the PAs should automate income verification in buildings occupied by income-eligible customers. Grover said that many residents of subsidized housing are unaware of discounted-energy rates, but some property managers use an automatic system to enroll residents on their behalf. Grover requested that the PAs share building-specific

data to understand which buildings have been served. Grover said that the CFP has been empowered to be creative with outreach and program implementation. With respect to Grover's statement regarding including community aggregation electricity rates, Coen responded that customers have access to a heating-cost calculator and the PAs are adding functionality that will enable customers to edit energy rates.

EWG Discussion

Lynch suggested that current means for income verification have been identified as a barrier and asked for viable alternatives since the PAs have cautioned against self-attestation of income. Pratt responded that Action for Community Development Boston (ABCD) performs income certifications which offer more flexibility. Pratt recommended that the PAs grant the CAAs and ABCD the ability to income-qualify residents. Pratt also said that self-attestation is easiest for customers and requiring that they sign an affidavit can protect against fraudulent practices. Wambui agreed that the PAs should explore these methods for income verification.

Wambui commented that completing the process for income verification is not an issue when customers believe they will receive benefits, but exceeding income limits by one dollar will bar people from enhanced incentives and services. Wambui suggested that the PAs provide additional funds to support more than 10 hours of work for energy advocates. Wambui highlighted the positive feedback offered by the panel of CFP participants and said that it reflects major improvements.

Murray echoed Wambui's comments and asked if information gaps cause skepticism about heat-pumps. Pratt replied that customers worry about electricity costs, do not understand heat-pumps, or do not think that heat-pumps will fulfill space-heating needs. Pratt said that heat-pumps are not intuitively viewed as cooling technology and language barriers add complexity to customer communications.

Quattrochi said that some landlords that speak languages other than English have been steered away from Mass Save programs and energy-efficiency projects, so the PAs should ensure that translated materials are accurate. Quattrochi noted that building upgrades are filed in the public record and landlords have a general understanding of tenant incomes, which could mitigate the need for upfront screening. Whiteman asked how the program would be protected from fraud. Quattrochi said that landlords could accept a lien being placed on their property as a mechanism to protect against fraud.

Washburn asked if educational materials on heat-pumps are left with customers and whether these materials are translated into language other than English. Altemose said that most leave-behind-marketing materials have focused on incentives and not specific technologies, but the CFPs could help the PAs create these materials. Lynch indicated that leave-behinds might not be effective in terms of accurately capturing the different delivery models for weatherization services and HVAC equipment.

Lynch asked if any panelists noticed that income-eligible customers have an easier time participating than market-rate customers due to the quarterbacking model. Fernandez-Aubert responded that the quarterbacking model should make participation easier for income-eligible

customers, but coordination between CAAs and PAs extend project timelines. In addition, more income-eligible customers face technical barriers due to older housing stock.

Quattrochi commented that the provisions for language access in the 2025-2027 Plan should be consistent with federal requirements for printing ballots in different languages. Quattrochi said that federal data will demonstrate which languages the PAs need to prioritize in different areas. Wambui said that National Grid is developing informational videos in different languages with the Lowell Cambodian Community Association. Wambui stressed the importance of communicating long-term energy costs and the clean-energy transition to customers. Wambui said that Mass Save programs cannot solve all of the state's climate issues and there are external programs to support decarbonization efforts. Wambui also said that the Residential Property Assessed Clean Energy program was disbanded since property liens were disadvantageous to low- and moderate-income customers.

Coen announced that the PAs have transitioned to a new vendor, Resource Innovations, in order to expedite rebate processing and develop a robust customer-service platform. Coen said that contractors in the Heat-Pump-Installer Network (HPIN) can offer direct-to-contractor rebates, which mitigates upfront costs for customers while rebates are processed. Whiteman asked if there is a list of all HPIN contractors that have opted to receive direct-to-contractor rebates. Coen said that there is not a full list online, but contractors can collect heat-pump rebates on a customer's behalf and remove upfront costs for the customer.

Morton suggested that poor installations will lead to negative testimony on heat-pumps. Morton said that heat-pumps must fulfill HVAC needs while improving energy burdens, which can be supported by other funding such as the \$400 million grant for which DOER is applying to support solar power in low- and moderate-income buildings with heat-pumps. Morton said that programs beyond Mass Save are essential to improve economic prospects for heating electrification in gas-heated homes.

Washburn recommended that the PAs develop a customer guide describing all incentive offerings when they are searching for contractors. Washburn said that the guide should differentiate direct-to-contractor rebates, contractor financing, and HEAT Loans. Coen replied that the Mass Save website includes guides for contractor selection in addition to free heating and cooling consultations that can be scheduled online.

Grover indicated that Abode supports customers by providing education on heat-pumps and comparing quotes across contractors. Grover said that a small list of qualified, experienced contractors install heat-pumps in Melrose which has simplified the process for customers. Coen said that Eversource and National Grid are piloting the quote-comparison tool and will roll it out more broadly after testing.

Lynch requested that the panelists share written feedback on how to improve program delivery with the EWG. Altemose encouraged all CFPs to share written feedback with the EWG and PAs.

5. Adjournment

Whiteman, acting as Chair, adjourned the meeting at 1:06 PM.

Meeting Materials:

- Official Meeting Notice
- Meeting Link
- CFP and Language Access Presentation