



## **EQUITY WORKING GROUP MEETING MINUTES**

**Monday, August 21, 2023**  
Virtual Meeting: Zoom

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**Equity Working Group Members Present:** Brooks Winner, Maggie Downey, Mary Wambui, Charlie Harak, Alexis Washburn, Stephanie Terach, Margie Lynch, Mary Wambui, Kyle Murray (for Amy Boyd), Sonakshi Saxena, William Rose (for Jo Ann Bodemer), Cindy Luppi, Doug Quattrochi, James Collins, Jhenny Saint-Surin, Ben Cartwright, Alissa Whiteman

**Equity Working Group Members Absent:** (None)

**Other Attendees:** Adrian Caesar, Ina Dasso, Aladdine Joroff, Anxhela Mile, Benjamin Silverman, Bernetta Morton, Chris McClellan, Corey Starzman, Danilo Morales, David Lyons, Degen Larkin, Emma Zehner, Katelyn Mazuera, Leah Cohen, Lissette Matos, Mary Knittle Nina Mascarenhas, Russell Sabadosa, Sam Nigro, Steve Cowell, Brian Beote

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### **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 EWG updates or public comments.

### **3. Renter Strategic Plan and Renter Offers**

#### ***Background: Renter Strategic Plan and Renter Offers***

Terach and Saxena, on behalf of the program administrators (PAs) provided background information on offerings for renters and the Renter Strategic Plan. Terach described PA-led research on renter barriers, mechanisms for barrier mitigation, and efforts to increase participation by renters and landlords. Saxena reviewed strategies for partnerships and program delivery included in the Renter Strategic Plan.

#### ***EWG Discussion***

Sabadosa asked how many renters and small businesses were served compared to goal. Lynch indicated that 160 small-business customers received weatherization services in 2022, but the PAs are not able report renter participation. Downey said that Cape Light Compact is optimistic about small-business weatherization since the offering has produced promising results following its launch in late 2022.

Lynch asked if the Low-income Energy Affordability Network (LEAN) offers enhanced incentives to and serves all customers in a building if income-eligible customers comprise the majority of building occupants. Collins replied that 100% incentives and funding for pre-weatherization barriers are offered to all tenants if income-eligible occupancy is greater than 50%. If income-eligible occupancy is less than 50%, then LEAN coordinates delivery with market rate vendors and provides full cost coverage for the income-eligible residents.

Whiteman asked if LEAN wants to serve mixed-income buildings with one contractor despite varying incentives and program treatment. Collins confirmed that serving mixed-income buildings with one contractor will ease the customer experience, but program reporting would still disaggregate participation by income eligibility.

Wambui contended that Mass Save programs need to recognize buildings with affordability restrictions in a consistent fashion with the City of Boston, which defines affordable housing as units with affordability restrictions. Wambui said a 70-unit building in Rollins Square with residents at or below 70% area-median income is not recognized as income-eligible due to Mass Save protocol, thus the program is missing an opportunity to reduce greenhouse-gas emissions and energy burdens for many low- and moderate-income customers.

Cowell asked if there is an agreement in which landlords pay for energy costs and pass on energy-efficiency benefits to renters without increasing rent. Wambui said that the tenants at Rollins Square only pay for electricity, but reductions in energy consumption do lead to rent reductions as rent is controlled through other subsidies. Collins noted that the income-eligible programs requires rent-control agreements and other requirements to maintain housing affordability.

Nigro commented that the Mass Save website should clarify whether tenants need to conduct income verification in order for landlords to receive incentives for pre-weatherization barriers or weatherization services. Nigro said that the \$7,000 incentive is lucrative and will motivate more landlords to complete weatherization projects.

Luppi expressed strong support for landlord agreements that include protections against rent increases due to energy-efficiency upgrades. Luppi said that the Green Justice Coalition does not want public programs to cause unintended consequences like gentrification.

Washburn asked if any landlords are reluctant to sign affordability agreements, how the PAs enforce agreements, and any issues have arisen in the past. Collins said that landlords are generally willing to sign affordability agreements, which vary depending on building size, and that he has not experienced issues enforcing the agreements. Harak said that compliance with

affordability agreements is generally strong and phone calls are often the only mechanism needed to ensure compliance.

Winner asked if building residents are informed when landlords sign affordability agreements. Collins indicated that both tenants and landlords sign the agreements.

#### **4. Panel: Landlords and Renters**

Whiteman introduced the panel of speakers on landlords and renters, which included Hessann Farooqi, Russell Sabadosa, Lissette Matos, Mary Knittle, and Doug Quattrochi

##### ***Hessann Farooqi (Boston Climate Action Network)***

Farooqi summarized feedback provided by tenants provided in a Mass Save workshop hosted by the Boston Climate Action Network, which has organized many Community First Partners (CFPs) and served low- and moderate-income communities. Farooqi highlighted several takeaways from tenant feedback:

- Instant rebates and improved financing strategies are required to address the lack of upfront capital which prevents low- and moderate-income customers from participating.
- Program-eligibility requirements and the process for income verification can be unclear depending on who serves customers.
- Customers have expressed concerns about rent increases due to improved building insulation and appliances.
- The Weatherization Assistance Program should provide services to all discount-rate customers.

Farooqi recommended increased funding for CFPs since they have conducted effective outreach and established trust with customers, particularly given the prevalence of scammers. Farooqi suggested that the PAs provide CFPs with free measures, energy-saving kits, and materials explaining how they can receive more comprehensive upgrades after home-energy assessments. Farooqi said that utility bills should describe Mass Save programs and the PAs should refine customer service in order to build more trust in Mass Save.

##### ***Russell Sabadosa (Massachusetts Landlord)***

Sabadosa, a landlord of thirty years, commented that he has participated in Mass Save since its inception and called it “the best-kept secret” and that the PAs can greatly expand marketing efforts. Sabadosa said that three of his properties have received comprehensive upgrades and each would have benefitted from improved energy efficiency even sooner. Sabadosa suggested that the PAs prioritize the promotion of Mass Save resources, then advocate for energy-score reporting in the building sector.

##### ***Lissette Matos (Massachusetts Landlord)***

Matos, a landlord of six years, recounted a negative experience trying to replace gas appliances in four housing units in 2019. Matos indicated that her properties had knob-and-tube wiring and did not qualify for many incentives, but she had to wait two more years to get the properties assessed again. Matos said that the knob-and-tube wiring is a difficult barrier to replacing an oil

boiler with heat-pumps. Matos clarified that the properties did not qualify for HEAT loans even though energy specialists collected all information from tenants and assessed each unit. In addition, the properties could not receive insulation services, so incentives and installed equipment were limited to LED bulbs, thermostats, and low-flow showerheads. Matos estimated a total cost of \$60,000 to install heat pumps at each property with \$20,000 in rebates, which would still leave a substantial copay. Matos said that National Grid advertised free upgrades for income-eligible tenants in multifamily properties, but program requirements are unclear, wait times are challenging, and customers cannot cover large copays. Matos suggested that insufficient incentives may push customers to install cheaper, less efficient equipment. Quattrochi said that the vendors may have presented Matos with outdated information on Mass Save offerings.

***Mary Knittle (Worcester Community Action Council)***

Knittle commented that a combination of Mass Save rebates and Low-Income Home Energy Assistance Program (LIHEAP) incentives fund the majority of services provided by the Worcester Community Action Council (WCAC). Knittle indicated a 50% increase in first-time applications at the start of 2023 year and a 20% increase in overall applications due to growth in Mass Save programs and supplemental LIHEAP funding. Knittle noted that the WCAC hired a heat-pump consultant to educate customers on benefits and empower them to make informed decisions. Knittle said that engagement strategies for mixed-income properties include tenant outreach since tenant-landlord relationships can be challenging as it relates to facility improvements. Knittle said that LEAN has helped streamline, coordinate, and track services while serving landlords and tenants effectively. Knittle indicated that many landlords have expressed interest in Mass Save and have proactively engaged with the WCAC.

***Doug Quattrochi (Massachusetts Landlords Association)***

Quattrochi listed themes from the commentary offered by the panel and other landlords in the Mass Save Landlord's Association.

- Mass Save vendors provide different project-cost estimates, so quotes should be submitted to a central system for fairness. This is particularly problematic if vendors fabricate project scopes, regardless of building size or labor requirements, to exploit rich incentives and HEAT loans.
- The programs should capture savings opportunities from measures like induction stoves.
- The PAs should present the multifamily program to property owners as a comprehensive, multistep plan. There are technical barriers that may only impact certain units in a building, so the program should implement a holistic approach to serving buildings.
- Tenants generally oppose major renovations that result in shifting utility bills once paid by the landlord to the tenant during occupancy, so the PAs should develop language for renter agreements where landlords can directly receive renter-utility bills.
- The PAs should engage landlords when they are in court for claims regarding housing conditions. These are opportunities to intercept emergency replacements for heating systems.
- Coordinate with municipal utilities on program delivery to accommodate landlords with buildings in different utility-service areas.

- Deliver comprehensive training to ensure that all contractors, independent of experience, employ practices that guarantee quality and safety.

### ***EWG Discussion***

Lynch asked Knittle to describe how Mass Save can improve services to renters and landlords. Knittle replied that consistency and standardization of incentives and project scoping is key. WCAC Contractors serving market-rate and income-eligible customers received different guidelines and missed a recent opportunity because an income-eligible project was initially identified as market rate. Knittle also said that some contractors dislike working with Community Action Agencies so this coordination requires improvement. Knittle added that many changes have been made to incentives and income-verification procedures in an attempt to remove barriers for low- and moderate-income customers, so others like Matos may have better experiences if they participate in current programs. Lynch asked if project-cost estimates for income-eligible projects have a higher standard deviation than market-rate projects. Quattrochi responded that variance in cost estimates impacts all residential customers, particularly those that do not speak the same language as program vendors, so the PAs need to supervise cost estimates. Matos noted that another property owner installed heat-pumps with \$10,000 in rebates, but the original \$16,000 scope was increased to \$26,000. Matos agreed that the PAs should monitor and vet how vendors determine project costs.

Harak said that contractors are prevented from gaming prices in the income-eligible program due to standardized pricing and asked if similar oversight is applied to pricing for market-rate projects. Collins replied that LEAN has centralized approval for income-eligible jobs across the state. Downey said that the PAs are aware of potential gaming due to rich incentives. Lynch said that market transformation is subject to cost challenges due to potential gaming, but the PAs have the opportunity to review all invoice submissions and project scopes from contractors. Lynch noted that the weatherization market has fixed pricing, so the PAs will need to determine how to oversee pricing in the open market for HVAC.

Morton recalled positive experiences supporting Mass Save programs, while others in her community have provided mixed reviews and faced challenges similar to Matos. Morton said that LEAN served income-eligible customers through a seamless process and proposed that the PAs combine programs to focus on building-level efficiency and avoid confusion. Morton also highlighted the need to support landlords with naturally-occurring-affordable housing such that they can implement upgrades and continue to offer affordable housing.

Washburn asked if the PAs track heat-pump pricing in a central database to address concerns around prices and quality assurance. Washburn said that the Massachusetts Clean Energy Center reported the cost of solar energy in dollars per watt across the entire state to ensure transparency. Washburn also said that heating-and-cooling consultations offered by the PAs do not consider heat-pump prices that customers may research online. Lynch said that the PAs collect invoices and should be able to determine average heat-pump prices in dollars per ton across the state.

Morton commented that Mass Save has emphasized digital marketing and outreach, but many customers are not digitally literate. Morton asked when the PAs launched the renter offerings for 100% weatherization coverage and \$7,000 in pre-weatherization-barrier incentives. Nigro replied

that these offerings, specific to market-rate renters, were launched in November 2022. Nigro said that landlords do not have to income-verify residents and significant incentives are available. Income-eligible renters receive full-cost coverage for all measures. Collins said that different types and sizes of heat-pump projects have different costs.

Wambui stated that Mass Save exists in an ecosystem of many programs and it will not solve the Commonwealth's climate ambitions alone. Wambui said that the CFP was launched to provide community-appropriate marketing strategies and create a path to better serve non-English-speaking and elderly customers. Wambui said that the emphasis on decarbonization in Mass Save programs is a recent change, but the 2025-2027 Three-Year Plan should address the many years that environmental justice communities were underserved.

Nigro suggested that area-median income would be more appropriate to determine income eligibility than state-median income due to stark differences in the cost of living across the Commonwealth.

Quattrochi asked if dedicated PA staff could support landlords as they seek to participate in programs to benefit their tenants. Lynch responded that Eversource is piloting a role for such services for in 1-4-unit buildings, and Saint-Surin said the other PAs intend to follow suit. Quattrochi said this role may address many concerns like pricing transparency and guided participation, so the EWG should support this in its recommendations for the 2025-2027 Plan. Federspiel said that the Massachusetts Clean Heat Commission is working on a clearing house for decarbonization programs which would centralize and describe all resources for customers. Whiteman said that a similar effort is underway to support customers in Merrimack Valley who were impacted by the 2018 gas explosions.

Winner suggested that the PAs advertise the ability for landlords to receive rich incentives without performing income verification for their tenants. Winner said that the programs impose significant work on income-eligible customers such that they can receive rich incentives, so creating barriers for specific customer segments is unfair.

Farooqi agreed that using a combination of PA support staff and CFPs to work with customers would benefit landlords and tenants seeking to participate in programs. Farooqi said that contractors understand building needs, CFPs understand community needs, and Mass Save staff understand program requirements.

Matos recommended that vendors describe the process for participation in greater detail since the programs offer many different services that customers can leverage. Matos said that CFPs should market Mass Save at gathering places for underserved customers, such as the Tewksbury Library which has a large network for elderly residents.

Wambui thanked the panelists and encouraged them to propagate their enthusiasm for Mass Save in their respective municipalities. Murray agreed and highlighted the need to address barriers when actually implementing high-level concepts.

Whiteman announced that the EWG would host its next meeting on September 11.

## **5. Adjournment**

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

### **Meeting Materials:**

- Official Meeting Notice
- Meeting Link
- Renter's Presentation