

2025-2027 DRAFT PLAN – CONSULTANT TEAM DEEPER DIVE REVIEW

► **May 15, 2024**

OVERVIEW

- ▶ **New plan represents a continued shift to focusing on GHG emissions reductions**
- ▶ **C-Team working to ensure Plan addresses Council priorities with associated budget allocations**
 - **Reviewing Plan against Council recommendations**
 - **Assessing costs and spending allocations**
- ▶ **Consultant Team working with PAs to understand assumptions arounds specific topics and priorities**
 - **Slides present an update on the “deep dive topics” identified by the Consultants**

PRESENTATION OVERVIEW

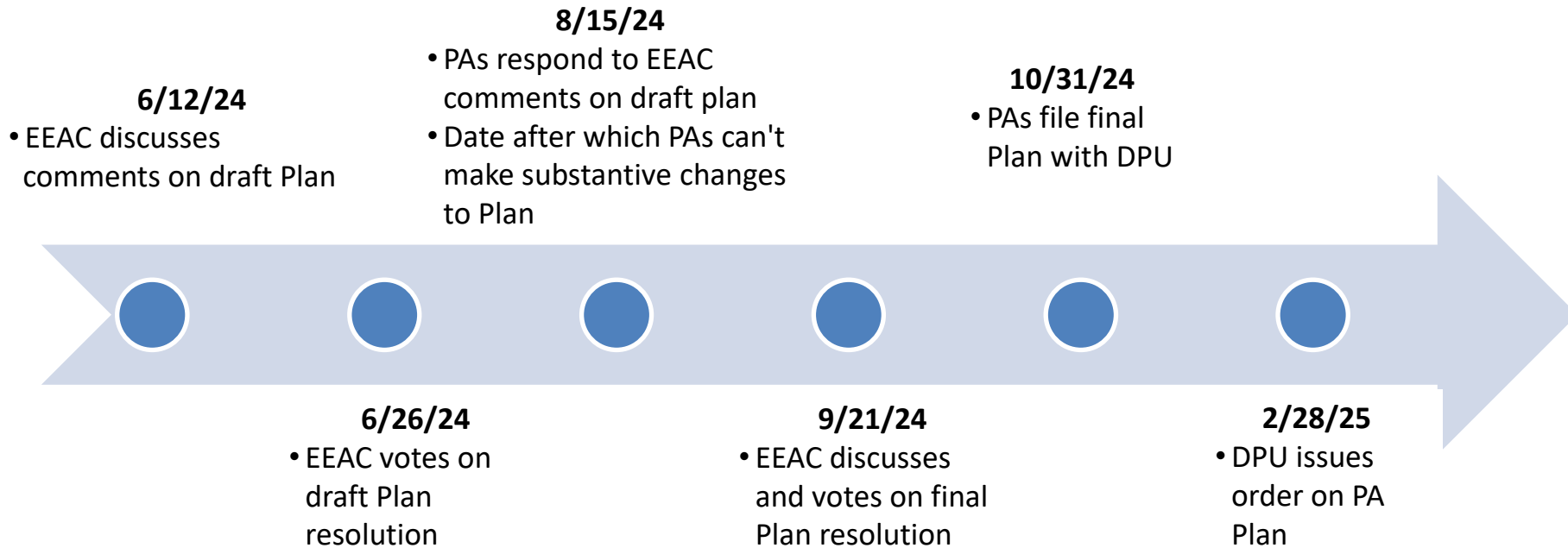
- ▶ **Commercial and Industrial**
 - C&I Working Group (CIWG)
 - C-Team
- ▶ **Equity**
 - C-Team on behalf of Equity Working Group (EWG)
- ▶ **Residential**
- ▶ **Low Income**
- ▶ **Cross-cutting**
 - Items to be fleshed out
 - Active Demand
 - Workforce Development

"DEEP DIVE" PROCESS AND NEXT STEPS



- ▶ **C-Team, PAs, DOER, and AGO to hold several upcoming meetings**
 - Sector-specific groups to discuss topics needing further consideration
 - Group to discuss BCR model assumptions and data tables
- ▶ **Groups will meet weekly over the next 5-6 weeks**
- ▶ **Outcomes of meetings will be reported at the June⁴ EEAC meeting**

PLANNING PROCESS REMAINING TIMELINE/MILESTONES





COMMERCIAL & INDUSTRIAL

INTRODUCTION

► C&I Review Process:

- Work with PAs and CIWG to ensure Draft Plan addresses Council priorities by:
 - Reviewing Plan against Council recommendations
 - Assessing costs and spending allocations

► Presentation Format:

- Review opportunities for enhancement in Draft Plan
 - Review consultant feedback
 - Review CIWG feedback
 - PA feedback
- Discuss Next steps and Deep Dive topics
 - Opportunity for larger stakeholder group to discuss alignment

C&I SUMMARY

BUDGET AND SAVINGS

C&I Sector (Planned)	2022-2024 Plan	2022-2024 MTM Adjusted	2025-2027 Plan	% Change w/ MTM Adjustments	% Change (compared to 22-24 plan)
Budget	\$1,509,669,795	\$909,523,670	\$1,245,413,463	37%	-18%
Incentives	\$1,169,717,410	not provided in MTMs	\$726,719,113	n/a	-38%
Total Benefits	\$3,613,054,098	\$2,689,482,729	\$3,790,918,184	41%	5%
Lifetime MWh	8,490,966	6,851,702	4,653,513	-32%	-45%
Lifetime Therms	304,470,070	169,074,527	253,632,185	50%	-17%
GHG Emissions Reductions (Annual Metric Tons CO2e)	288,589	203,927	244,383	20%	-15%

OPPORTUNITIES FOR ENHANCEMENT

OVERALL

C-Team Feedback

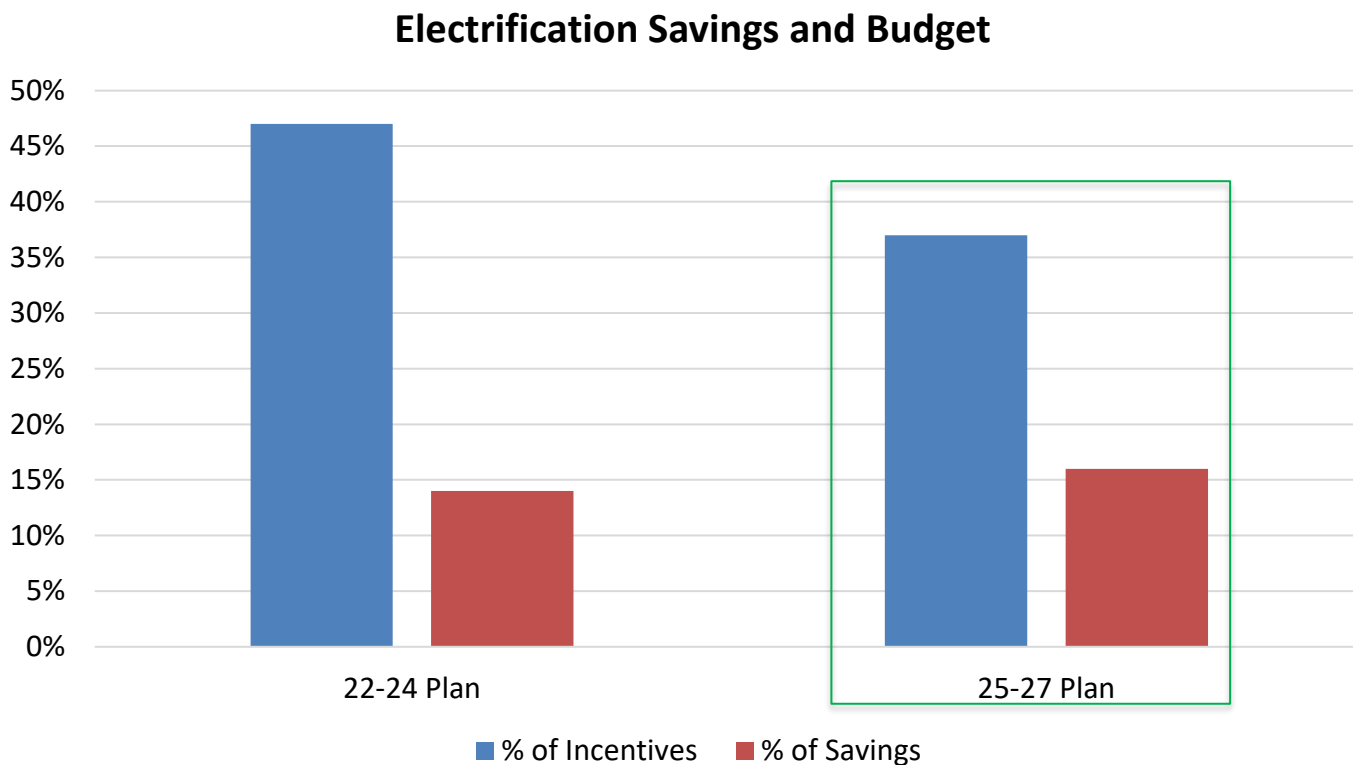
- **Plan includes significant enhancements**
 - **How** will new items will be executed (e.g., available in Y1, Y2 or Y3 of plan, etc.)
 - Provide high level timelines
- Assessment/revision if gains aren't realized through initial efforts

CIWG Feedback

- **District Geothermal Integration**
 - Recognizing that district geothermal is occurring independently, plan should incorporate discussion of opportunities for integration

ELECTRIFICATION PLAN COMPARISON

- ▶ Electrification comprises **37%** of incentives delivering about **16%** of savings in draft plan



OPPORTUNITIES FOR ENHANCEMENT ELECTRIFICATION (OVERARCHING)

C-Team Feedback

- **Add a cohesive overarching discussion of strategies and market interventions intended to drive market change**
- **Document mechanisms to drive growth for electrification**
- **Address Council resolution on C&I electrification including:**
 - Electrify 60% of delivered fuel customers and 20% of gas customers by 2027
 - Work with vendors to expand their business
 - Develop standard measure packages
- **Statewide approach to prescriptive electrification is positive**
 - Add discussion of new approach to program delivery, tracking and reporting in plan
- **Eligibility for additional solar support**
 - Add discussion in C&I – how will this be advanced, tracked and integrated?
 - Opportunity to expand to support electrification cost effectiveness for customers?

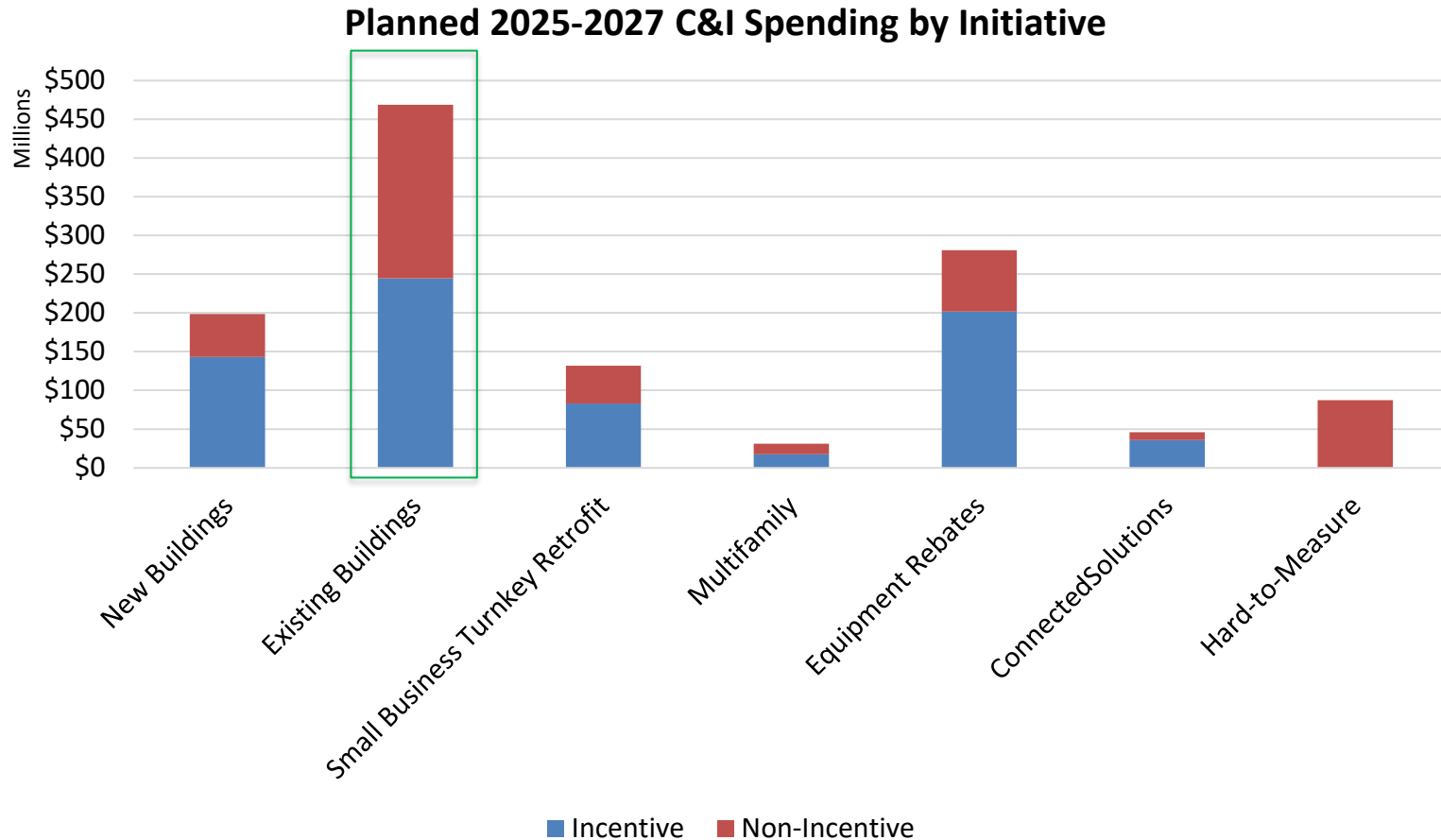
OVERARCHING OPPORTUNITIES

ELECTRIFICATION PLANNING

C-Team Feedback

- **Further discussion on study approach and pricing**
 - \$2,000/building for Portfolio Prioritization Plans and up to \$13,000/building for Decarbonization Roadmaps
- **“Support” or “Encourage” rather than “Allow” on-site renewable generation plans**
- **Include consideration of grid interactive solutions, batteries and other load management strategies during planning**
- **Discuss CIWG and Council recommendations including:**
 - Clarify customer process and provide a guide to help customers navigate
 - Detail how opportunities and advancements will be tracked over time
 - Address service provider qualifications

OPPORTUNITIES FOR ENHANCEMENT EXISTING BUILDINGS (OVERARCHING)



OPPORTUNITIES FOR ENHANCEMENT EXISTING BUILDINGS (OVERARCHING)

C-Team Feedback

- **PAs are investing more in customer studies, clarify:**
 - How study type selection will align with customer needs
 - How options will be communicated to customers and market
 - How QA/QC will be managed
 - Cost and incentive structure and how the PAs will assess whether incentives are adequate

CIWG Feedback

- **Confirm increased funding will lead to results**
- **For continuous process improvement, establish a process of developing, tracking and if needed, reporting out metrics:**
 - How would they be established and monitored?
 - What is the scope for incorporating and tracking beyond what is mentioned in the plan?

OPPORTUNITIES FOR ENHANCEMENT EXISTING BUILDINGS (PROCESS)

C-Team Feedback

- **Improve Technical Review**
 - Establish metrics and baselines, assess and report on progress
 - Clarify PA differences in approach
- **Improve Measure Performance**
 - Track vendor project results and address vendor deficiencies
 - Analyze why projects haven't delivered savings and undertake an ongoing, systematic process to improve results
 - Include mechanism to assess whether training investments correlate with improved outcomes

CIWG Feedback

- **Address Focus Group and CIWG Input**
 - TA vendors allowed to design measures
 - Portal for customers to track project progress
 - Marketing/information piece for completed projects



OVERARCHING OPPORTUNITIES

EXISTING BUILDING COMMISSIONING

C-Team Feedback

- **Considers Council recommendations by earmarking incentives and highlighting the offer**
 - Council recommended completing 2,200 studies – plan is for 1,000
 - Clarify how the PAs will change market interest in this service
 - Support ongoing engagement for EBCx with larger facilities for persistence and continuous improvement
 - Continue developing EBCx offer with input from market research and C-Team

CIWG Feedback

- **How will incentives be restructured to ensure that money for studies results in projects being implemented?**



OPPORTUNITIES FOR ENHANCEMENT EXISTING BUILDINGS – SCHOOL ELECTRIFICATION

C-Team Feedback

- **Appreciate PA willingness to collaborate on a new approach and provide energy managers and grant application assistance**
- **Recommend outlining a vision that guides the initiative goals**
 - For example: Transform a select group of schools in identified EJ communities into zero net energy facilities that provide high indoor environmental quality spaces for students and staff.
- **Commit to providing flexibility and dedicated PA liaison to coordinate with other state funding agencies**
- **Recommend a more comprehensive and holistic approach to incentives than the standard C&I approach**
 - For example, dollar value per square foot or percentage of overall cost towards certain stages of decarbonization
- **Plan includes municipal buildings under initiative, but PAs already have strong municipal participation so unclear why this is included**



OPPORTUNITIES FOR ENHANCEMENT

GHG REDUCTION MEASURES

C-Team Feedback

- **Carbon Capture**
 - Define Carbon Capture of Point-Source Emissions
 - Add discussion of approach and timeline
- **Customer gas leak mitigation**
 - Discuss enhancements from test results
 - Clarify customer characteristics
- **Refrigerant leak mitigation**
 - Include HP system leak assessment and mitigation

CIWG Feedback

- **Low-Embodied Carbon Building Materials**
 - Develop a list of suppliers
 - Undertake efforts to develop and grow the supply chain and market for these materials

OPPORTUNITIES FOR ENHANCEMENT

SMALL BUSINESS TURNKEY

C-Team Feedback

- **Continue to vet Council Recommendations not substantively addressed**
- **Address how vendors/providers are assessed, performance is tracked, and issues are rectified in this vendor-driven program**
- **Address customer experience tracking and quality assurance**
- **Renters and landlords**
 - Promote energy aligned leases per Council Rec. and detail “increased incentives and outreach efforts”
- **Enhance services for Customer Directed Options (CDOs) – good addition**
 - Clarify the continued engagement strategies with CDOs for C&I
- **Revise criteria for comprehensiveness to include % total reduction in energy use rather than counting end uses that receive measures**



OPPORTUNITIES FOR ENHANCEMENT

C&I NEW CONSTRUCTION AND MAJOR RENOVATIONS

C-Team Feedback

- **Grid interactive buildings**
 - Provide information on development and planned roll out timeline.
 - Describe how the PAs plan to integrate economic analysis that supports the cost effectiveness of this approach for customers
- **Training should address the need to train market actors on embodied carbon reductions and grid interactive buildings**

CIWG Feedback

- **District Geothermal Integration**
 - Recognizing that district geothermal is occurring independently, plan should incorporate opportunities for integration



C&I DEEP DIVE TOPIC WORKING GROUPS

SCHEDULE AND TOPICS

May 8	<ul style="list-style-type: none">• Small Business Turnkey• Existing Building Commissioning
May 14	<ul style="list-style-type: none">• Small Business Turnkey (continued)• Data
May 21	<ul style="list-style-type: none">• Driving Market Change<ul style="list-style-type: none">▪ Decarbonization Roadmap▪ Electrification
May 28	<ul style="list-style-type: none">• Driving Market Change (continued)
June 4	<ul style="list-style-type: none">• Data• Schools Initiative



EQUITY

PROCESS

- ▶ **The Equity Working Group (EWG) has led on equity-related matters. It has met monthly since January**
 - To develop recommendations to the EEAC & PAs for the draft plan
 - To assess the draft plan against its recommendations
 - Review has focused on highest priority issues
- ▶ **EWG refresher**
 - Subcommittee of the EEAC; members include 7 voting EEAC Councilors, 4 PA reps, 2 EEAC Consultants, 3 community organization reps
 - Role: Identify barriers, propose strategies, and monitor progress to increase equitable access and participation in energy efficiency programs among underserved customers and provide input and feedback to the EEAC

HIGH LEVEL FEEDBACK

- ▶ **The EWG has significant concerns that the Draft Plan does not go far enough in supporting achievement of equitable outcomes; there needs to be substantial additional progress toward distributive justice**
- ▶ **There are positive elements in the Draft Plan to advance progress in achieving equitable outcomes**
 - The Program Administrators (PAs) are highly engaged in the Equity Working Group's 2025-2027 planning work and have clearly demonstrated a commitment to collaboratively developing solutions to barriers to participation

THE EWG IS PLEASED TO SEE



\$1.4 in planned investments in equity-related efforts



Enhanced access for low and moderate income customers



Adoption of the EWG's recommendation to target 21 communities for enhanced focus and incentives

- High proportions of low and moderate income customers
- High proportions of renters
- Most with Community First Partners



Enhanced incentives for verified moderate income customers statewide, with a new turnkey delivery model combining delivery of barrier remediation, weatherization and heat pump installation

THE EWG IS PLEASED TO SEE



Increased support (\$ and resources) and flexibility for Community First Partners



Increased support for energy efficiency and electrification improvements in schools in equity communities



Additional supports for customers to improve their experience (e.g., Statewide Contact Center)



Additional funding for workforce diversity



Enhancements to small business offers

THE EWG IS CONCERNED ABOUT

- ▶ **Making significant progress on distributive justice as a key component of equity**
 - Proportionally low investments for low income heat pumps and renters
 - Program design must address persistent barriers for moderate income customers and renters
 - Plan language should more clearly articulate distributive justice as a key component and reflect need to improve “underservice” to customer segments

While GHG reduction and budget/customer bill impacts are important, distributive justice requires a higher distribution of resources and focus on historically underserved customers.

EWG RECOMMENDED CHANGES

I. INCREASE # OF PLANNED LOW INCOME HEAT PUMPS (SPACE AND WATER HEATING)

- 2025-2027 planned LI units are only 9% of total HP units
 - Lower than 2023 production (12.4%)
 - A proportional goal would be closer to 1/3 of total units
- The Plan must provide more resources to replace/displace existing electric resistance, oil and propane
 - Low income heat pumps are considerably more expensive per unit to the program than market rate (2+x)
- Solar for All should be co-delivered to provide additional benefits

EWG RECOMMENDED CHANGES

II. INCREASE PLANNED FUNDING FOR RENTAL PROPERTIES

- Reallocate significant funds currently planned for owner-occupied units in the moderate income and market rate sectors
- AND/OR increase budget for rental property efforts

This change will increase alignment with the EEAC's expressed interest in progressing toward distributive justice.

EWG RECOMMENDED CHANGES

III. RELAX INCOME VERIFICATION FOR RENTAL PROPERTIES IN THE 21 EQUITY COMMUNITIES

- Relax income verification requirement to access enhanced incentives for barrier remediation and/or heat pumps
 - Goal is to remove a key participation barrier for significantly underserved customers and increase appeal to property owners
 - Continue to require income verification to access the more comprehensive low income incentives--must be actively promoted
- Many details to be worked out to assess and balance important considerations (e.g., existing fuel and other typology, budget and cost management, potential rent increases, ensuring that funding is directed to customers most in need)

EWG RECOMMENDED CHANGES

IV. FURTHER EXPAND SUPPLIER DIVERSITY EFFORTS

- Enhance coordination between Mass Save and Mass CEC as funding commitments are doubled
 - Create key performance indicators to assess progress in diversifying workforce supporting Mass Save
- Incentivize/reward participation of diverse suppliers in PA procurements
- Implement recommendations and best practices from the forthcoming Mass Save MWBE study

NEXT STEPS

Continue to work actively with the PAs to support their assessment and adoption of the EWG's recommendations

EWG will continue discussing the draft plan at its June 3 meeting; add'l recs. may be provided

- E.g., relaxing background checks for returning citizens; small business; language access; CFPs

Continue discussions to ensure that the Equity Performance Incentive mechanism aligns with 2025-2027 EEAC equity recommendations



LOW INCOME

LOW INCOME RECOMMENDATIONS

Recommendations	Addressed in Draft Plan?
<i>I. Expand and Increase Marketing and Outreach, Customer Capture and Enrollment, and Service Delivery</i>	
A. Implement non-traditional, innovative, expansive, and flexible approaches to eligibility determination, marketing and outreach and enrollment to reach and facilitate enrollment of all income eligible customers	Yes
B. Streamline and simplify steps and processes for the customer at all steps of the customer journey to reduce burdens on low-income customers and maximize participation	More information needed
C. Maximize the effectiveness and cost efficiency of service delivery	More information needed
D. Ensure customers receive equitable and equivalent end-to-end service regardless of where they live, who serves them, or their demographic circumstances (race, ethnicity, language, documentation status, rent/own status, etc.)	More information needed
<i>II. Accelerate Greenhouse Gas Reductions Through Expanded Weatherization and Electrification Efforts</i>	
A. Increase production for electrification measures as necessary to equitably meet the Commonwealth's greenhouse gas reduction goals	Partially
B. Require any necessary weatherization in Income Eligible Services Program understanding that weatherization is necessary to the achievement of the GHG reduction goals	Yes
C. Provide support for new gas, oil, and propane measures only as may be necessary, while also strategically pursuing gas to electric heat pump conversions	Largely
<i>III. Expand Data Availability and Management to Support Goal Setting and Performance Improvements</i>	
A. Expand data availability to support goal setting and targeted outreach	More information needed
B. Provide additional and timely data to support program assessment by internal and external stakeholders	TBD
C. Establish and maintain electronic/computerized data management systems to accomplish above guiding principles and recommendations	No
<i>IV. Ensure Adequate Budgets to Achieve Priorities in an Equitable and Balanced Manner</i>	
A. Provide the necessary Electric and Gas budgets to serve comprehensively 15% more low-income customers than in the 2022-2024 Term and that will meet the electrification and other goals noted herein	More information needed

EXPAND CUSTOMER OUTREACH AND CAPTURE, SERVICE DELIVERY

Addresses EEAC's recommendations



- Year-round standalone income verification services
- Consideration of alternative income verification methods
- Consideration of use of Area Median Income for single family program eligibility
- Striving for single comprehensive assessment
- Enhanced language access services

Areas for Improvement



- Move above considerations/striving to commitments
- Increased transparency regarding program delivery and capacity issues, including differences between CAPs
- Relationship between federal and Mass Save programs
- Treatment of 5+ mixed income buildings

ACCELERATE GHG REDUCTIONS

Addresses EEAC's recommendations



- Exploring a pathway to proactively reach out to customers with aging fossil fuel systems to evaluate opportunities for conversion to heat pumps
- Pre-weatherization and pre-electrification barrier funding and services for 5-25 unit buildings
- Triple pane windows (single to triple to start, studying double to triple)

Areas for Improvement



- Increase planned low income heat pump production for space and water heating
- Increase weatherization production
- Change aging fossil fuel systems exploration to a commitment

EXPAND DATA AVAILABILITY

Addresses EEAC's recommendations



- Leveraging available data to identify customers with aging fossil fuel systems for proactive strategic electrification
- Inclusion of low income metrics in key performance indicators (specifics to be confirmed)

Areas for Improvement



- Describe in plan on how electronic data management systems will be used to support increased efficiency and enhanced program performance

ENSURE ADEQUATE BUDGETS

Addresses EEAC's recommendations



- The planned Low Income budget for the 2025-2027 Term is 62% higher than planned for 2022-2024

Areas for Improvement



- An increase in the low income budgets (especially electric) will almost certainly be required for higher heat pump production

LOW INCOME DEEP DIVE

► Topics

- Increased heat pump production for space and water heating
- Share of fossil fuel space and water heating
- Cost reduction opportunities
- Capacity to accommodate significant growth (workforce, electronic data management, etc.)

► **A single session on these low income topics is scheduled for May 29**

Low income active demand management (ADM) will be addressed in a separate forum for ADM issues



RESIDENTIAL

RESIDENTIAL RECOMMENDATIONS

Recommendations	Addressed in Draft Plan?
<i>I. Accelerate GHG Reductions and Transition Away from Fossil Fuel Incentives</i>	
A. Launch with the start of the 2025 plan year revised New Homes and Renovations and Additions (R&A) offerings that promote and incentivize electrification and above code performance	New Homes: yes R&A: unclear
B. Significantly increase weatherization production by building production for HEAs, increasing weatherization conversions, and increasing incentives for certain heat pump customers	Partially
C. Redesign the Home Energy Assessment to identify decarbonization opportunities	Yes
D. Increase the number of heat pump and heat pump water heater installations in the 2025-2027 Plan to make necessary progress toward achieving 2030 goals of the Clean Energy and Climate Plan	Yes
E. Implement additional strategies to ensure heat pump installations are paired with weatherization	Partially
<i>II. Simplify the Customer Experience from Intake to Installation</i>	
A. Provide easy to understand and more visual information to customers to clearly identify energy savings opportunities and how to access them	Yes
B. Streamline the residential programs through a redesign that reduces burdens on customers and facilitates increased participation	Partially
<i>III. Expand Data Availability and Management to Support Goal Setting and Performance Improvements</i>	
A. Provide additional data to support advancement of program goals and program assessment by internal and external stakeholders	Yes/TBD
B. Maintain and provide public access to all reported and other available data in a single electronic location	Partially
C. Enhance accuracy of reported data	No

ACCELERATE GHG REDUCTIONS

Addresses EEAC's recommendations



- Meets Secretary's GHG reduction goals
- Scope of Home Energy Assessments expanded to decarbonization
- New offers for new construction—single family homes must be all electric
- New turnkey delivery approach combines barrier removal, wx and heat pumps, starts w/mod income custs.
- Targeted PA offers (e.g., National Grid solar PV incentive)

Areas for Improvement



- Increase emphasis for heat pumps beyond single family market rate
- Increase weatherization and water heating production
- Co-delivery of partial displacement HPs and weatherization through Rebate channel—not required nor newly incentivized

SIMPLIFY CUSTOMER EXPERIENCE

Addresses EEAC's recommendations



- New Statewide Contact Center
- Redesigned HEA report
- Optional pre-approval for heat pump installations
- Turnkey service delivery for barriers, weatherization, heat pump
- Enhanced personalization experience on MassSave.com
- Enhanced language access services

Areas for Improvement



- Approach for renters and multifamily customers (see EWG)
- Instant rebates for all customers
- More details on key offers and strategies, including turnkey services, cost management, additions and renovations

EXPAND DATA AVAILABILITY

Addresses EEAC's recommendations



- Commitment to provide valuable and easy to understand information on program performance
- Commitment to provide consistent and reliable data reporting to Community First Partners (CFPs); exploring solutions
- Increased budget for data management

Areas for Improvement



- Confirmation of specific data to be reported and frequency
- Confirmed solution for data sharing with CFPs
- Single site hosting all program data
- Commitment to enhancing accuracy of reporting

RESIDENTIAL DEEP DIVES

► **Deep dive topics selected to focus on issues of greatest impact and Council priorities, including:**

- Budget
- Greenhouse gas emissions reduction
- Equity
- Impacts of new offers

May 8

- New program supports, associated costs, and potential redundancies

May 22

- HEAT Loans and heat pumps

June 5 &
other dates

- Other residential topics

RES DEEP DIVE I: NEW PROGRAM SUPPORTS

- ▶ **Draft plan shows a strong commitment to improving customer experience**
- ▶ **New/expanded supports:**

Statewide Contact Center	Turnkey service model
Home Energy Assessments (expanded scope and services)	Navigators
Decarbonization consultations	Community First Partners
Electrification advocates	Optional pre-approval for heat pumps

- ▶ **Deep dive focus:**
 1. **Opportunities for cost reductions (esp. in minimizing redundancies with existing services)**
 2. **Impact on customer journey/experience**
- ▶ **May 8 meeting outcomes:**
 - PAs have not yet assessed cost reduction opportunities, but have committed to do so
 - There likely will be identified modest budget reductions
 - Consultants still assessing impact on customer exp.

RES DEEP DIVE II: HEAT LOANS AND HEAT PUMPS

Topics being treated together because the plan assumes 60% of heat pump customers will use the HEAT Loan

HEAT Loans

- ▶ **Increases in uptake for heat pumps (HPs) and interest rates have increased planned incentives to \$400 million**
 - Despite proposed lower max. loan and shorter term (from 7 to 5 years)
 - Combined HEAT Loan and heat pump incentives could be as much as \$15k for market rate
- ▶ **Key questions to be examined:**
 - Are buydowns of interest rates to 0% for all customers the most equitable use of these funds—what are other options?
 - E.g., use of means testing
 - What may be the impact of the new Massachusetts Community Climate Bank?

RES DEEP DIVE II: HEAT LOANS AND HEAT PUMPS

HEAT Pumps

► Proposed changes in draft plan

- Whole home incentives decrease over the course of the term—partial displacement incentives do not
- Partial displacement incentive changes from \$/ton to \$/per outside condenser—unclear whether this is an increase or decrease
 - Weatherization is not required
- Small house incentive being developed

► Key questions to be examined:

- What are the impacts of the various incentive and delivery changes (amounts, structure, turnkey approach)?
- Do they adequately advance market transformation, policy objectives, and customer needs?
 - Whole vs. partial displacement
 - Co-delivery with weatherization
 - Cost management

RES DEEP DIVE III: OTHER RESIDENTIAL TOPICS

OTHER RESIDENTIAL TOPICS

- Multifamily and renter production (see also Equity Working Group (EWG) recommendations)
 - Weatherization production
 - Water heating production
 - Language access services (possibly at EWG)
 - New construction and additions & renovations
 - Behavior
 - Active demand management
- ▶ **Goals are to discuss planning assumptions and possible changes, especially to production and budgets**
- ▶ **Will require more than one meeting and also use existing forums (e.g., EWG, Res Management Committee)**



CROSS CUTTING

WORKFORCE DEVELOPMENT

- ▶ **Council Recommendations focused on:**
 - Enhancing coordination with MassCEC
 - Providing additional investments in Clean Energy Pathways to increase engagement with youth from EJ communities
 - Substantially increase financial support for training in key areas
 - Increasing diversity of the providers supporting Mass Save
- ▶ **Plan included some WFD enhancements, though not many of the specific Council recommendations**
 - Additional \$12 million annually for the MassCEC Equity Workforce Program
 - PAs and MassCEC will meet regularly
 - PAs to offer workforce training grant
 - Additional efforts around supplier diversity
- ▶ **More discussion needed on relaxing background checks for returning citizens**



ACTIVE DEMAND MANAGEMENT

Recommendation	Addressed in Plan?
Expand Enrollment in Existing Direct Load Control and Curtailment Offering	<ul style="list-style-type: none">• PAs exceeded recommended growth rates for residential offerings, with 15% annual growth for both t-stats and storage (Goal was 5% & 10%)• Low income participation no longer broken out; unclear if participation expected to grow (Goal was 10%)• PAs fell short of C&I growth recommendation, with a 7% annual growth rate for both curtailment and storage (Goal was 10% & 15%)
Prepare for Future ADM Opportunities including Advanced Metering Infrastructure (AMI)	<ul style="list-style-type: none">• PAs state that they may offer an AMI supported whole-home/whole-small business demand management program• Not offering enhanced incentives for connected devices
Continue to Explore Opportunities for New Offerings such as Gas Demand Management and Winter Electric Demand Management	<ul style="list-style-type: none">• PAs commit to working with EEA and ISO-NE to determine appropriate cost-effective strategies for gas & winter electric demand management in the plan



THANK YOU

QUESTIONS?



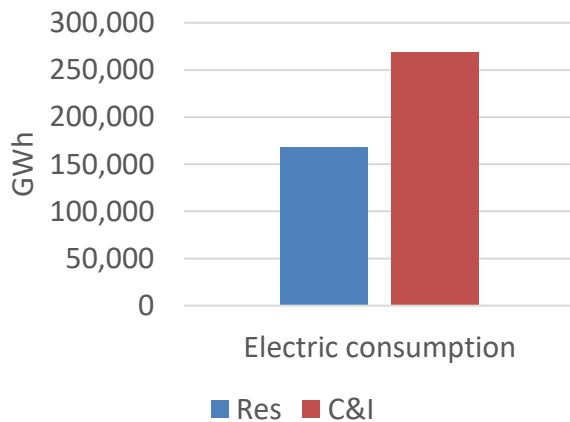
APPENDIX

PLAN ANALYSIS

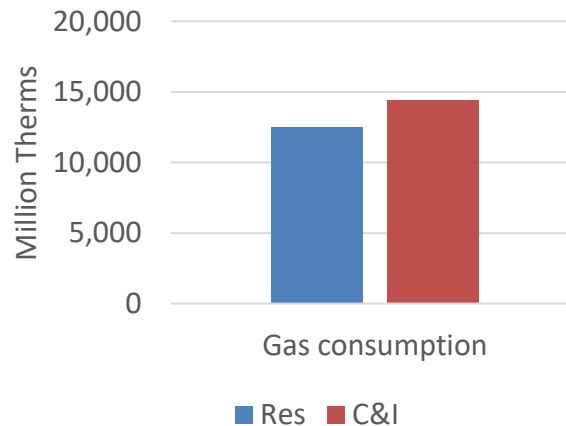
C&I MARKET ENERGY USE AND ACCOUNTS

- ▶ **Significant opportunity for C&I impact on energy goals due to high end use consumption**

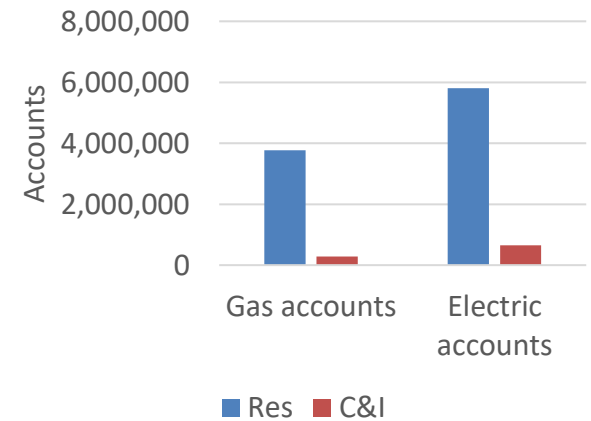
**Total Electric Consumption
(2013-2022)**



**Total Gas Consumption
(2013-2022)**



**Total Unique Billing Accounts
(2013-2022)**



PLAN ANALYSIS

C&I WORKING GROUP AND PROCESS

Areas of interest from the C&I Working Group informed C&I Workshops

CIWG identified Opportunity	Description	Status in Plan	PA feedback
Custom Process	Clarify, simplify and shorten the process for developing and implementing custom projects	Partially addressed	EB Enhancement #1 - Several improvements described
Communications	Improve and clarify communications channels	Partially addressed	EB Enh. #1 - Several improvements described
Electrification	Improve and clarify processes and services to support medium and large customer transitions to electrical-based infrastructure	Partially addressed	EB - New Studies, EB Enh. #3, more details under development
HVAC Measures	Increase access to HVAC savings through enhanced offerings	Not addressed	Increased custom HVAC incentive levels in budget (Electric and Gas). EB Enhancement #4: EBCx is an enhanced, primarily for HVAC/controls.
Process Measures	Increase process measure savings through enhanced offerings and education	Not addressed	Increased custom Process incentive levels in budget (Electric and Gas).
Vendor Capability	Improve the capacity of vendors to address multiple end uses, provide deep savings and develop custom projects.	Partially addressed	(1) Substantial focus on workforce. (2) New vendors procurements in 2024 for both large and small customers for vendors with expertise in both EE and electrification (Small Business, Tech. Assistance, others). (3) Comprehensive Building Assessment. Reference EB Enh. #1 and #3, ER&I Enh. #4.
Program Consistency	Improve consistency of offerings and approaches across PAs	Partially addressed	EB Enh. #1; Small Business Turnkey Retrofit Enh. #1
Education	Improve resources available to customers that reflect their opportunities and needs	Not addressed	Significant focus on education & training. Could you provide more detail on which "Resources?" One EEAC rec we didn't address but may add in the final was the ventilation guide.