# Memo

MA ENERGY EFFICIENCY ADVISORY COUNCIL

→ CONSULTANT TEAM

To: **Energy Efficiency Advisory Council**

From: **Gretchen Calcagni and the Consultant Team**

Date: **January 26, 2026**

Subject: **EEAC Consultant Team Proposed 2026 Work Plan and Budget Request**

## SUMMARY

### Strategy for this Work Plan

In 2026, the Consultant Team will track and report on PA progress towards 2025-2027 goals and Council priorities including electrification and GHG reductions, equity, and budget management and cost, among others. We also expect our work in 2026 to be forward looking to support the development of 2028-2030 Plan as the process will likely kick off during the summer months.

As in the past, our work is divided into several advisory groups, representing the major areas of effort across the entire range of Consultant Team responsibilities and portfolio of PA programs. Within each advisory group description, several work areas further clarify the tasks and topics that we plan to address over the coming year. For budget tracking purposes, these tasks will be tracked against the budget categories submitted as part of the Consultant Team's response to the RFR for Council technical services. In addition to the tasks described below, we have included a separate deliverables section as well as a timeline of when these deliverables are expected to be completed but note that we retain flexibility to respond to the Council and other topics/issues as they arise. The Consultant Team's contract begins January 2026, and the budget described in this work plan reflects a 12-month period through December 2026.

One task that will cut across all advisory group areas will be supporting the development of the 2028-2030 Plan. Rather than describe the same Three-Year planning process tasks in each advisory group individually, we have described the work of the whole Team related to this task in the section below. Additional three-year planning work specific to individual advisory groups, such as developing the EM&V 2028-2030 Strategic Evaluation Plan (SEP) and supporting the Avoided Energy Supply Cost Study (AESC), are covered in their respective sections.

## THREE YEAR PLANNING

As previously stated, the 2028-2030 planning process will begin in 2026. We understand that the Council desires a collaborative process for developing the Three-Year Plans, including goal-setting and the relationship between the Plans and longer-term goals including the Commonwealth's energy and climate policies. Therefore, we will work with the Council, individual Councilors, workshop participants, other stakeholders, and the PAs to get input and feedback and to seek outcomes that are developed collaboratively with a goal of earning the support of all voting Councilors. We will take our direction from the Executive Committee and the Council at large in terms of how best to address deliverables for the planning process.

Since all advisory groups will be involved in these efforts, we've provided the table below to summarize the planning process activities and deliverables we expect to occur in 2026. Because the PAs are required to submit their draft plan for approval and comment by the energy efficiency advisory council by March 31, 2027 the bulk of developing planning policy and programmatic frameworks will need to take place in 2026. A key input to the planning process is the PA potential studies. The Consultant Team's expectation is that the PAs will share draft results and inputs earlier in the study process to ensure understanding and agreement when the draft reports are shared with the Council. If information is not shared in

advance, additional resources may be needed to provide input on potential savings and GHG reductions to support goal development. The Consultant Team will be developing a more detailed schedule in collaboration with DOER and the PAs.

| Activity/Milestone | Description | Task/Deliverable | Timeframe |
|---|---|---|---|
| **Planning Workshops** | Work with DOER and Council to define and support the workshop process | Tasks may include analysis, research, memos, and/or presentation on specific topics as directed by the Council. each individual topic, as well as summary documents covering key topics for discussion and issues that may impact planning | May-Dec 2026 |
| **Listening Sessions** | Public listening sessions held to solicit input on the Plan | Attend listening sessions to understand broader stakeholder and community input into the Plan | May, August 2026 |
| **Review of PA Potential Study Inputs** | Consultant Team review and assessment of results of PA potential studies | Review of potential study inputs and materials | June-October 2026 |
| **Review of PA Potential Study Results** | Consultant Team review and assessment of results of PA potential studies | Memo or presentation on analysis of potential studies results and methodologies and recommendations for use in plan development | November-January 2026 |
| **Strategic planning** | Work with DOER, AGO, and PAs to schedule and participate in meetings related to high priority topics identified as areas of focus for the next Three-Year Plan | Tasks may include analysis, research, memos, and/or presentation on specific topics | On-going 2026 |

## PLANNING & ANALYSIS

### Context

Our work around planning and analysis will focus on several important Council support activities. These include:

- → Supporting the Council in its efforts to ensure effective program and portfolio performance and to achieve the 2025-2027 Three-Year Plan goals. This includes providing guidance related to new elements in the Plan.
- → Aiding the Council as it begins the process of outlining key elements of the 2028-2030 Three-Year Plan.
- → Reviewing and assessing the results of the 2025-2027 Three-Year Plan, including analyzing successes and missed opportunities.
- → Ensuring that the Council is effective in the performing its responsibilities, and that Council processes are informative, effective, and efficient.
- → Providing technical analysis to support the development of talking points on the benefits of Mass Save.

To work towards and facilitate these outcomes, we will work in the three major planning and analysis areas described below. To the extent a task comes up that is not explicitly or fully listed in this plan, the Consultant Team will establish a scope and budget for its execution.

## Work Areas

**PARTICIPATE IN EEAC MEETINGS, BRIEF AND SUPPORT THE COUNCIL**

- → Prepare for and attend all EEAC meetings and Executive Committee meetings as directed.
- → Provide independent technical support in advance of and during Council and Executive Committee meetings for all areas of energy efficiency and demand reduction planning, policy development, technical and economic analysis (cost-effectiveness), program design and implementation, and tracking and monitoring of progress towards achieving the 2026 goals. This includes a variety of deliverables including emails, spreadsheets, memos and presentations.
- → Provide individual briefings to Councilors on a rotating basis with the goal of talking to each Councilor at their desired frequency.
  - o Assess additional opportunities to support and interact with Councilors such as recurring "office hours"
- → Assist with providing orientation for new(er) Councilors. This includes individual meetings, review and edit of the councilor handbook and any other historical information the new councilor may need.
- → Support subgroups of the Council as directed including the C&I working group, and Equity working group.

**TECHNICAL ANALYSIS**

- → Support planning and analysis for implementation of 2025-2027 Plan; review and analyze results.
  - ▪ Review and analyze available information to guide implementation, evaluation, and reporting of new elements in the Plan such as electrification, GHG targets, work force development efforts, equity metrics, and budget management efforts, among others.
  - ▪ Review, analyze, and assess the PAs' reports and reporting, including the monthly dashboards and quarterly reports. Review trends and multi-year comparisons, review reporting on new elements of the Plan, and provide Consultant findings and recommendations to the Council. This task includes presentations to the Council throughout the year.
  - ▪ Use the PA reporting to assess and report to the Council on the status of program achievement towards the 2025 and 2025-2027 Three-Year Plan goals and related topics. Identify and assess any data or programmatic trends which portend successes or challenges in program delivery and savings. This may take the form of presentations and/or memos.
- → Identify reporting improvement opportunities.
  - ▪ Work with the PAs and the Council to design and implement further improvements to the PA reports and analysis, quarterly and otherwise, in response to Councilor feedback, including forward-looking projections and enhanced trend comparisons in the reports. This includes continuing to refine and clarify quarterly metrics data.
  - ▪ Review Mass Save Data and revisions and provide feedback to the PAs. Provide input on future revisions and additions. Task includes ongoing discussions and written suggestions on potential changes.
- → Support cost-effectiveness screening, benefits analysis, and EM&V activities.
- → Conduct a comprehensive analysis of the cumulative impact of Mass Save. This task will cover the lifetime energy impacts of prior program activity and will aim to quantify the cumulative benefits in terms of energy (kWh, therms, etc), dollar benefits to customers, and potentially the economic impact of the programs. The exact scope of the analysis will be determined in discussions with the council and the PAs to ensure that it is an objective analysis to support a better understanding of Mass Save achievements.
  - ▪ Provide technical input and review draft work products for the Regional Avoided Energy Supply Component (AESC) avoided costs study and participate in the study group meetings with the PAs (and potentially with representatives from the participating states). Task includes review of past studies, participation in study group, and written and analysis output as needed.
  - ▪ Analyze cost-effectiveness screening, assessment of benefits and costs, and application of EM&V results and field experience; propose appropriate improvements for cost-effectiveness analysis and common screening tools.

- Review, comment on and contribute to the electronic Technical Reference Manual (eTRM). This is still an evolving process and the Consultant Team will assess what is needed as more information becomes available. We will review the benefit cost ratio (BCR) models inputs for consistency with the eTRM where applicable.

→ Coordinate strategic planning

- Coordinate strategic planning efforts with the PAs through regular meeting of the Implementation and Planning Group (IPG). This group provides a forum to discuss long-term strategic planning issues that may not be part of the current plan.
- Coordinate and meet regularly with the Planning and Analysis Group to discuss and provide direction on technical topics related to 2028-2030 planning.

→ Contribute to other state and regional planning and analysis efforts

- As needed, contribute to and review ISO-NE efficiency forecasting efforts, ensure the consistent and appropriate treatment of efficiency in the ISO forecast, and review and provide comments on the work of the ISO-NE Energy Efficiency Forecast Working Group. Task includes participation in the working group and close coordination with DOER and reporting to the Council on outcomes and for decisions that determine key project direction.
- Provide technical assistance for reporting and tracking the Three-Year Goals and energy efficiency impacts for the Clean Energy and Climate Plan (CECP), including impacts of efficiency programs and other efficiency strategies on the 2030 CECP goals. Task includes memos and/or presentations to the Council as needed.

→ This may include technical assistance to support the implementation of any Massachusetts policy changes that may impact Mass Save and energy efficiency landscape in Massachusetts.

- Monitor active demand coordination needs including:
  - Implementation and potential coordination with other Commonwealth efforts to utilize demand resources such as locational based services.
  - The roll out of advanced metering infrastructure and potential coordination with PAs on potential impacts to program design and offerings.

**SUPPORT THE COUNCIL ON REGULATORY ISSUES AND DPU PROCEEDINGS**

→ Track, monitor, review, summarize, and present to the Council information on all relevant DPU proceedings affecting energy efficiency and demand reduction programs, as assigned.

→ Support additional proceedings that the Council wishes the Consultants to cover as they relate to the continued delivery of the Three-Year Plan.

## RESIDENTIAL AND LOW-INCOME SECTORS

### Context

2026 will be a demanding year for the Mass Save Residential and Low-Income Sectors as the PAs strive to implement ambitious electrification and equity commitments for the 2025-2027 Plan while beginning planning work for the 2028-2030 Term.

The Consultants' work for the Residential and Low-Income Sectors this year will have two primary focuses:

1. Working with the PAs to support successful achievement of their commitments and goals in the second year of the 2025-2027 Plan Term and tracking, assessing, and reporting to the EEAC on progress in doing so. This will include an intensive focus on achievement of the heat pump and weatherization goals for both Sectors. In addition, the Consultants will continue to work to advance equitable delivery of Mass Save programs and services to all Residential and Low-Income customers, with a specific focus on supporting achievement of the Equity Targets and other equity commitments—including Designated Equity Communities—included in the 2025-2027 Plan.

2. Conducting quantitative analysis, best practices research, and other work required to support the Council and the PAs in the initial stages of planning for the new 2028-2030 Term to advance the Council's priorities.

Additional context, details, and work efforts are provided for three work areas below: Residential Program Support, Low-Income Program Support, and Equity.

## Work Areas

**RESIDENTIAL PROGRAM SUPPORT**

In this second year of the 2025-2027 Term, the Consultants will work to support and assess the PAs' progress in achieving their commitments, with a focus on meeting heat pump and weatherization goals and building out additional support for decarbonization by residential customers, including continuing to enhance decarbonization resources in Home Energy Assessments (HEAs).

While many equity-related efforts are encompassed by the Residential Sector (e.g., moderate income offers), the Residential Program Support work area will focus primarily on non-equity related matters. The Equity work area is treated separately below.

The Consultants' work for the Residential Sector in 2026 will include the following:

→ Track, provide input on, and report on PA progress towards meeting 2025-2027 Plan goals and commitments, including:
  - Meeting heat pump installation goals for the 2025-2027 Plan
  - Implementing customer supports for decarbonization through the Rebates Core Initiative including:
    - Decarbonization Consultations, including quote comparisons
    - Heat pump pricing transparency tool(s)
    - Rebate pre-qualification (optional)
    - Local decarbonization advocates
    - Heat Pump Leaders Network
    - Online marketplace for heat pump water heaters
  - Meeting weatherization goals for the 2025-2027 Plan
  - Continuing to enhance decarbonization resources in Home Energy Assessments HEAs).

→ Providing turnkey support and enhanced incentives (barrier remediation, weatherization, heat pumps, heat pump water heaters) to moderate income customers and collaborating with PAs to assess whether the offer is ripe for expansion to all residential customers in 2027
  - HEAT Loan revisions, including new income tiers
  - Achieving production goals for new homes and renovations
  - Monitoring the standard all-electric offer for new homes and other new homes and renovations program enhancements to reduce market barriers to electrification

→ Support ongoing work of the Council
  - Review and analyze residential information and data in the PAs' monthly data dashboards, quarterly reports and the metrics workbook, and periodic reporting on relevant indicators as well as any ad hoc reports. Use data to identify trends, opportunities for cost efficiencies, successes and challenges, and PA differences
  - Participate in Residential Management (RMC) meetings twice per month to discuss progress and provide support to PA efforts to achieve their commitments for the 2025-2027 Plan Term. The schedule of focused topics for discussion will be developed with the RMC in Q1.

- Participate in Council meetings with a residential focus, including preparing meeting materials as appropriate, reviewing PA draft presentations, and briefing Councilors
- Participate in HEAT Loan Working Group
- Respond to requests for information from Councilors and other stakeholders
- Participate in regular residential meetings with DOER to discuss progress and provide support

→ Conduct research and analysis necessary to support development of Council priorities and actionable strategies for the 2028-2030, including:

- Continuing to advance program offers for electrification for all customers
- Integrated delivery of weatherization and heat pumps
- Streamlining customer participation pathways
- Advancing new uses of technology for targeting, customer experience, and cost efficiency

**LOW-INCOME PROGRAM SUPPORT**

The Consultants' work for the Low-Income Sector in 2026 will also be focused on achieving planned goals and commitments, with a particular focus on heat pump, heat pump water heater, and weatherization unit goals as well as expansion of income verification services within the context of strong customer demand and the need for proactive budget management. The Consultants will also collaborate with DOER, the PAs, the AGO, and LEAN in the Low-Income Working Group to review and discuss opportunities for the low-income program delivery infrastructure to increase operational and cost efficiency, improve customer service, and support achievement of the Plan's ambitious goals.

The Consultants' work for the Low-Income Sector in 2026 will include the following:

→ Track, provide input on, and report on PA progress towards meeting 2025-2027 Plan goals and commitments, including:

- Budget management to ensure budget for all PAs is available to serve customers for the duration of the term in a manner that maintains strong customer service and a steady and predictable workflow for program contractor partners
- Meet production goals for heat pumps for space and water heating for all PAs
- Meet production goals for weatherization
- Meet production goals for other measures
- Proactive electrification of fossil fuel systems, customers who have previously weatherized, and buildings that heat with electric resistance and delivered fuels
- Implement comprehensive assessments
- Launch year-round income verification services
- Introduce additional energy savings measures, including window heat pumps
- Provide barrier mitigation funding for small multifamily units

→ Support ongoing work of the Council

- Review and analyze low-income information and data in the PAs' monthly data dashboards, quarterly reports and the metrics workbook, and periodic reporting on relevant indicators as well as any ad hoc reports. Use data to identify trends, opportunities for cost efficiencies, successes and challenges, and PA differences

→ Gather data and analyze performance differences in Community Action Partnership (CAP) territories to inform potential strategies for low-income services to be delivered more uniformly throughout the Commonwealth

→ Participate in Council meetings with a low-income focus, including preparing meeting materials as appropriate, reviewing PA and LEAN draft presentations, and briefing Councilors

- Participate in new Low Income Working Group
- Respond to requests for information from Councilors and other stakeholders
- Participate in periodic Low Income Best Practice meetings and provide support for new and continuing initiatives of group
- Participate in regular Income Eligible meetings with DOER to discuss progress and provide support
- When appropriate, participate in and/or provide support for regular DOER/LEAN meetings

→ Conduct research and analysis necessary to support development of Council priorities and actionable strategies for the 2028-2030 Plan, including:

- Continuing to advance electrification for all customers
- Phasing out support for lighting and fossil fuels
- Assessing and improving equitable service to low-income customers
- Implementing continuous improvements in co-delivery of federal and Mass Save funds

**EQUITY**

The 2025-2027 Plan includes ambitious PA budgetary and programmatic commitments to improve equity of service and distributive justice, including plans for enhanced services and incentives for moderate income customers and renters and a focus on 21 Designated Equity Communities. Equity issues apply to all sectors (Residential, Low-Income, and C&I), though this section of the Work Plan applies specifically to Residential and Low-Income Sectors.

The Consultants' work in 2026 for the Equity work area regarding Residential and Low-Income Sectors will include the following:

→ Work with the PAs and their partners to improve results for moderate income customers, including assessing success and improvement opportunities for the new turnkey offer

→ Monitor and assess progress in executing the commitments of the Strategic Renters Plan and in implementing the Language Access Plan with associated budget spend

→ Monitor and assess efforts to develop and support a diverse workforce

→ Participate in and support the Equity Working Group to support and assess the PAs' achievement of equity commitments for the 2025-2027 Plan, including:

- Increased barrier mitigation and electrification support for moderate income customers and renters in Designated Equity Communities
- No-cost residential turnkey services for moderate income customers
- Self-attestation of income for moderate income weatherization and expansion of eligibility to Area Median Income
- Increased funding, flexibility, and data access for Community First Partners
- Enhanced support for customers who speak a language other than English (LOTE) throughout the customer journey, including multilingual support through the new Statewide Solutions Center
- Increasing support for supplier diversity, including an aspirational benchmark to spend 15% of dollar volume of direct contracts with diverse suppliers
- Collaborating with Massachusetts Clean Energy Center to increase workforce diversity
- Achieving Equity Targets approved by the EEAC in January 2025

→ Support ongoing work of the Council

- Participate in Equity Working Group meetings and support the group with best practices research, compilation of relevant information, and other preparations as requested by the EWG and its co-chairs

- → Review, analyze/assess, and report on PAs' reporting of progress toward achieving the Plan's equity goals and commitments, including Equity Targets
    - Review, analyze/assess, and report on other regular PA reporting on equity matters (monthly, quarterly, biannual, annual, Term and ad hoc)
    - Participate in Council meetings with an equity focus, including preparing meeting materials as appropriate, reviewing PA draft presentations, and briefing Councilors
    - Respond to requests for information from Councilors and other stakeholders
    - Participate in regular equity meetings with DOER to discuss progress and provide support
- → Conduct research and analysis necessary to support development of Council priorities and actionable strategies for the 2028-2030 Plan

#### COORDINATE WITH EVALUATION MEASUREMENT & VERIFICATION (EM&V) EFFORTS

- → Regularly coordinate with EM&V Advisory Group to exchange updates on relevant work efforts
- → Review draft study plan and reports and provide input to ensure they will yield useful and actionable information to assess and enhance implementation efforts, including:
    - Heat pump market effects research
    - HEAT Loan research
    - Lead Vendor Implementation model research
    - Annual customer profile studies, results briefs, and dashboard
- → Work with the Residential Management Committee and Income-Eligible Focus Group to review, discuss, and implement evaluation recommendations
- → Contribute research priorities for the Strategic Evaluation Plan

## COMMERCIAL AND INDUSTRIAL SECTOR

### Context

The 2026 Plan year, the second of this transformational Three-Year Plan, is critical for the Commercial and Industrial (C&I) sector as the PAs continue to engage customers through a C&I Working Group to inform program design improvements for 2025-2027. To achieve plan goals, the PAs will need to accelerate the transformation of heating market with emphasis both on increasing volume through residential-sized heat pumps and on developing larger and more complex electrification projects. In addition, the PAs will need to establish a robust offering for existing building commissioning (EBCx), which ensures that facilities meet their current facility requirements for system performance, energy efficiency, sustainability, and occupant comfort. The EEAC Consultants will continue to monitor the PAs' progress toward goals and effectiveness of new offerings with the 2025-2027 Plan Commitments Tracker and increased granularity of quarterly data reports. Comprehensive identification of energy efficiency opportunities and accurate evaluation of savings is a critical input in making the business case for C&I stakeholders to prioritize energy and carbon reduction strategies as practical and climate-forward investments. The C&I Working Group continues to provide a bi-directional forum for the PAs to learn directly from the market and to provide guidance to market participants about directional changes in the Mass Save program. Additional details and work efforts are provided below.

### Work Areas

The C&I Consultant Team anticipates a continuation of work with the DOER and the PAs in a few key areas of activity:

#### C&I PROGRAM SUPPORT

- → Track, provide input, and report on PA progress towards 2025-2027 Plan goals and commitments, including but not limited to:

- Monitor and support PA increased contractual requirements for Small Business Turnkey vendors to develop and install comprehensive lists of efficiency measures as well as track and document marketing efforts and their impacts.
- Monitor PA progress in capturing projects that contribute to GHG reduction goals with specific focus on electrification and communicating the relationship between energy savings progress and this target.
- Monitor PA progress in marketing and processing customer applications for Deep Energy Retrofits offering; monitor PA efforts to establish Energy Star Portfolio Manager accounts (or equivalent).
- Monitor and assess improvements to the Existing Buildings program related to customer experience, timeliness, technical review processes, technical assistance, electrification planning, and measure performance and persistence.
- Monitor PA progress; in expanding participation in heat pump offerings, reaching delivered fuel customers and pairing weatherization with heat pump projects. Monitor PA progress in educating customers about non-HP opportunities for electrification, particularly in the Industrial & Manufacturing sectors.
- Expand C&I demand management offers to increase demand savings and manage peak loads. Monitor increased efforts to integrate demand management with energy efficiency offers.
- Support roll-out of a new, comprehensive Existing-Building Commissioning (EBCx) offering and monitor participation, support pursuit of real-time feedback through embedded evaluation. Monitor expansion of the National Grid Monitoring-Based Commissioning (MBCx) offering and participation and savings related to prescriptive and custom Building Management Systems & Controls (BMS) for existing buildings. As EBCx offerings will primarily targets large energy users, support the PAs in developing offerings suitable for mid-sized customers with building management/automation systems.
- Expand the volume of weatherization (Wx) projects that are completed for Small Business customers and ensuring that they are done in conjunction with other electrification projects. Continue to focus on Main Street events to drive Wx projects. Increase the PAs' interest in focusing on the quality of weatherization, potentially through embedded evaluation.
- Review the revised lighting strategy, program structure, and incentive levels to phase out uncontrolled lighting
- Collaborate with DOER to successfully decarbonize public schools in EJ communities by leveraging funds from the Mass Save PAs, Massachusetts Clean Energy Center (MassCEC), and Massachusetts School Building Authority (MSBA).
- Monitor quarterly progress toward planned 2025-2027 goals and identify measure-level deficiencies in performance.
- Review program application forms revised such that they align with the required phaseout of incentives for fossil fuel equipment.
- Collaborate closely with Evaluation teams to ensure that relevant evaluation data, findings, and study recommendations are discussed with PA implementation teams and implemented, as appropriate and beneficial to program delivery.

→ Analyze historic and current program performance to identify trends, areas of success, opportunities, and deficiencies, including:

- Electrification and fuel switching HVAC projects, including air and ground-source heat pumps and variable refrigerant flow (VRF) systems in both new construction and existing buildings
- Electrification and fuel switching for non-HVAC projects, including process equipment upgrades in manufacturing facilities
- Technical assistance and training for contractors and distributors, especially with respect to HVAC, building envelope, and electrification projects

- Custom HVAC projects including early replacement and replace-on-fail measures, retro-commissioning, energy management system and system optimization
- New construction offerings, including performance-based design, zero net energy, and Passive House projects

→ Participate in C&I Management Committee (CIMC) meetings twice per month to discuss progress and provide support to PA efforts to achieve their commitments for the 2025-2027 Plan Term. This also includes associated meetings with Subject Matter Experts (SMEs) ahead of the regular CIMC meetings and periodic coordination calls with the CIMC Co-Chairs. The schedule of focused topics for discussion was developed with the CIMC in January and tracks Council and DOER priorities for 2026.

→ Participate in C&I Working Group (CIWG) and C&I Stakeholder Hour meetings focusing on PA efforts to make program design, delivery and implementation changes based on CIWG feedback with continued emphasis on creative ways to achieve C&I deep energy retrofits.

→ Support DOER, PAs, the EEAC and external C&I stakeholders to ensure the CIWG provides the necessary forum to develop collaborative program enhancements in the key areas of custom project processing, electrification, and deep energy retrofits.

→ Participate in weekly meetings with DOER to review PA and C&I program progress, areas of program deficiencies and expected solutions, quarterly and annual PA reports, CIWG action items, and other topics as requested by DOER C&I lead.

→ Participate in Council meetings with a C&I focus, including preparing meeting materials as appropriate, reviewing PA draft presentations, and briefing Councilors.

**EQUITY**

This category for the work plan reflects the increased significance and volume of this work area in the 2025-2027 Plan and for the Consultants. Equity issues apply to all sectors (Residential, Low Income, and C&I), though this section of the Work Plan applies specifically to the C&I Sector. The Consultants' work in 2026 for the Equity work area for C&I will include the following:

→ Participate in Equity Working Group proceedings relevant to C&I customer segments such as small business, municipalities, and non-profits, as well as relevant workforce development issues

→ Drive adoption of cost-effective building envelope measures in all size commercial customers, with an initial emphasis on small business per Equity Targets and through new-in-2022 PA offerings to engage those small business customers and the workforce that serves them

→ Increase participation and savings by small and micro businesses, particularly for building envelope and weatherization measures

→ Continue to advance the partnership models explored in 2022-2024 as better methods for serving commercial renters, small and micro businesses, and limited English proficiency customers, particularly in Designated Equity Communities

→ Increase effectiveness of portfolio-wide efforts to enroll rental property owners in Mass Save

→ Participate in Council meetings with an equity focus, including preparing meeting materials as appropriate, reviewing PA draft presentations, and briefing Councilors

**COORDINATE WITH EM&V EFFORTS**

→ Regularly coordinate with EM&V Advisory Group to exchange updates on relevant work efforts

→ Review draft study reports and provide input to ensure they will yield useful and actionable information to assess and enhance implementation efforts

→ Participate with HP Market Theory / Transformation subcommittee for activities relevant to the C&I sector

→ Identify outcomes and recommendations in final studies and reports that should prompt responsive actions by PAs and determine whether they are being implemented effectively.

## EVALUATION, MEASUREMENT, AND VERIFICATION

The Evaluation, Measurement, and Verification (EM&V) framework established by the Council assigns substantial responsibilities to the Council Consultants. Working on the Council's behalf, we are charged with overseeing every phase of the EM&V process, including evaluation planning, contractor procurement, study implementation, reporting and outreach, and application of study results.

Highlighted EM&V team objectives in 2026 include:

- → Develop and implement EM&V research in support of the Council's priorities, including strategic electrification, customer equity, and moderate-income customers.
- → Ensure that the EM&V program optimally supports the development of the 2025-2027 three-year plan.
- → Carry out and further develop the EM&V policy changes adopted by the EEAC and elaborated during the planning process for the 2025-2027 Strategic Evaluation Plan (SEP).
- → Build out the new Embedded Evaluation track intended to provide more timely, targeted feedback to help improve program implementation, including collaborating with the implementation teams to support recommendation implementation where appropriate.
- → Plan and implement studies laid out in the 2025-2027 SEP.
- → Develop additional studies as needed to support the evolution of programs, policies, and markets.

We will work with DOER and the Council to determine the specific functions or studies to be covered as necessary.

### Work Areas

#### OVERSEE EM&V PLANNING

- → Ensure that the EM&V research agenda optimally supports the development of the 2025-2027 Three-Year Plan. This includes completing EM&V studies needed to support the PA potential studies, such as C&I and residential baseline studies that are already underway. It also encompasses providing input into the potential studies themselves. It may also include participating in discussions among the parties regarding EM&V policies to be followed in the next triennium, as well as contributing to term sheet agreements on EM&V issues. The following are some examples of key related EM&V activities:
  - Tracking the market effects from residential and small commercial heat pump programming.
  - Supporting the development of a new program theory for the residential New Construction program and using the results to develop a new gross-savings approach.
  - Performing a study to assess the availability of cost-effective electrification options for large C&I customers.
  - Conducting a process evaluation of the Heat Loan.
- → Plan new EM&V studies as needed to support impact reporting, program planning and implementation, and policymaking. Planning for individual EM&V projects focuses on refining research objectives, determining data collection and analysis activities, setting budgets, assigning contractor staff, and laying out project schedules. In order to ensure consensus and maximize opportunities for stakeholder input, the planning process for individual studies includes three separate planning stages from the time a study is conceived to the time it is implemented.
- → Carry out the EM&V policy changes adopted by the EEAC and elaborated during the planning process for the 2025-2027 SEP. These changes include ensuring that EM&V study results should not reduce the attribution of savings to the Mass Save programs when participating customers also leverage federal, state, and local initiatives and/or funding, and establishing procedures for differentiating between market-driven and program driven-major renovations. While agreements were reached on these policy issues as part of the 2025-2027 SEP process, those agreements call for some follow-up actions by the EM&V program (for example, in the case of the attribution issue, revamping self-report attribution methods to focus on the joint effect of all state-level public interventions jointly).

→ Build out the new Embedded Evaluation track intended to provide more timely, targeted feedback to improve program implementation. Under this new track, evaluators are intended to work side by side with implementers to provide early feedback on program changes using streamlined and flexible planning processes.

#### OVERSEE EM&V STUDY IMPLEMENTATION

→ Oversee the implementation of individual EM&V studies once they have completed the detailed planning stage. EM&V study implementation can include a wide range of data collection and analysis activities, the specific nature of which varies by type of study. Each study can have as many as eight stages from draft scope to survey instruments to draft and final reports.

#### OVERSEE EM&V REPORTING

→ Oversee the development and dissemination of interim and final reports on EM&V studies. Final EM&V reports in Massachusetts generally need to go through multiple drafts, as various stakeholders provide comments that must be processed collaboratively. This work area also encompasses overseeing the incorporation of impact evaluation results into the eTRM.

#### COUNCIL AND STAKEHOLDER ENGAGEMENT

→ Work with the Council, individual Councilors, and stakeholders, both to incorporate their input into EM&V plans and reports and to brief them on study results through presentations and other forms of outreach.

## TECHNICAL SERVICES

### Context

The Technical Services team is responsible for a variety of administrative tasks that support the Council's information sharing through the website. These tasks are described in more detail below.

### Work Areas

#### PRODUCE MINUTES FROM ALL EEAC MEETINGS

→ Ensure meeting minutes are collected from all EEAC, Executive Committee, and Equity Working Group meetings subject to the open meeting law and that these minutes are circulated for comment, corrected, and issued in final form for posting to the EEAC website in a timely manner.

#### WEBSITE UPDATES, REVISIONS, AND MAINTENANCE

→ Regular and timely updates of the website content.

→ Undertake effort to identify opportunities for improvement to the structure and organization of the website to optimize its functionality for the Council and other stakeholders.

#### CONSULTANT TEAM REPORTS

→ Provided timely and meaningful report of Consultant Team activities. The Consultant Team will produce activity reports on a bi-annual basis.

#### SUPPORT DEVELOPMENT OF THE ANNUAL REPORT TO THE DPU AND LEGISLATURE

→ If requested by DOER, we will support development of the most recent Annual Report to the DPU and Legislature.

## KNOWN DELIVERABLES

As previously noted, it has been helpful in previous years to we retain flexibility to respond to the Council and as other topics/issues arise. However, there are also many known deliverables we intend to complete in 2026. The sections below provide details on those known work products. We expect that schedules may change over time and will provide an updated list of known deliverables in each of the Consultant Team's quarterly work plans.

| Month | Category | Topic | Description | Advisory Group(s) |
|---|---|---|---|---|
| **January** | Memo | 2026 Work Plan | Memo describing Consultant Team tasks, deliverables, and budget for 2026 | All |
| | Presentation | 2026 Work Plan | Presentation summarizing Consultant Team tasks and deliverables for 2026 | All |
| **February** | Presentation | Income Eligible | A presentation on income eligible topics to be determined. | Residential |
| **March** | Presentation | 2025 Q4 Report | Observations on Metrics, PA differences, areas PAs not on track to meet goals or council priorities | P&A |
| **April** | Presentation | EM&V | Presentation summarizing the results of recent EM&V studies | EM&V |
| **May** | Presentation | Equity | A presentation on equity topics to be determined. | P&A<br>Residential<br>C&I |
| **June** | Presentation | 2026 Q1 Report | Observations on Metrics, PA differences, areas PAs not on track to meet goals or council priorities | P&A<br>Residential<br>C&I |
| | Memos and/or presentations | Planning Workshops | Materials to support the workshop process and development of Plan recommendations. | P&A<br>Residential<br>C&I |
| **July** | Presentation | Residential | A presentation on residential topics to be determined. | Residential |
| | Memo | Consultant Team Bi-annual Report | Report on Consultant Team activities and deliverables in Q1 and Q2 of 2026. | All |
| | Memos and/or presentations | Planning Workshops | Materials to support the workshop process and development of Plan recommendations. | P&A<br>Residential<br>C&I |

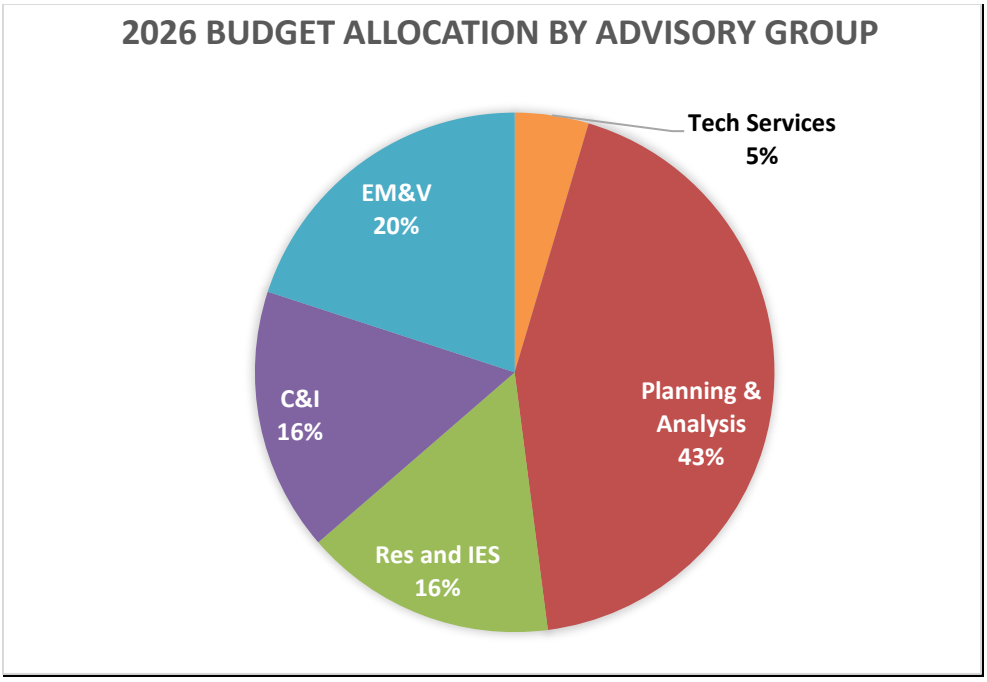
| Month | Category | Topic | Description | Advisory Group(s) |
|---|---|---|---|---|
| **August** | Presentation | 2025 Year End Results | Presentation on PA evaluated results from 2025 | All |
| | Memos and/or presentations | Planning Workshops | Materials to support the workshop process and development of Plan recommendations. | P&A<br>Residential<br>C&I |
| **September** | Presentation | 2026 Q2 Report | Observations on Metrics, PA differences, areas PAs are not on track to meet goals or council priorities | P&A<br>Residential<br>C&I |
| **October** | Presentation | EEAC Website | A presentation to walk though Council through updates to the EEAC website | Tech Services |
| **November** | Presentation | C&I Working Group | A presentation updating the Council on the work of the C&I working group | C&I |
| **December** | Presentation | 2026 Q3 Report | Observations on Metrics, PA differences, areas PAs are not on track to meet goals or council priorities | P&A<br>Residential<br>C&I |
| | Memo | Consultant Team Quarterly Report | Report on Consultant Team activities for Q3 and Q4 of 2026 | All |
| **On-Going** | Tracking Spreadsheet | EM&V Status Update | A spreadsheet summarizing the status of current and planning EM&V studies | EM&V |

## PROPOSED BUDGET (JANUARY-DECEMBER 2026)

The table below provides an overview of the Consultant Team's 2026 budget by budget category. As always, the Consultant Team only invoices for time and materials spent.

| | Strategic Planning | Planning & Implementation | EM&V | Technical Services | Total |
|---|---|---|---|---|---|
| **Total 2025 Approved Budget** | $462,796 | $614,378 | $302,979 | $71,012 | **$1,451,165** |
| **2025 Budget Spent** | Detail forthcoming | Detail forthcoming | Detail forthcoming | Detail forthcoming | **$1,267,624** |
| **2026 New Budget Request** | $602,510 | $649,075 | $329,635 | $75,865 | **$1,657,085** |

The chart below shows the allocation of the Team's requested 2025 budget by advisory group. This allocation is similar to recent years.



## PROPOSED BUDGET (JANUARY- DECEMBER 2026)

The table below provides an overview of the Consultant Team's 2026 budget by team member and budget category. For team members providing subject matter expertise as noted in the table, work on the project will be driven by specific tasks requiring the individual(s)' knowledge area. The Consultant Team will notify DOER prior to engaging the subject matter expert.

| | YEAR 1 | | | | | | |
|---|---|---|---|---|---|---|---|
| | Staff | Role | Strategic Planning | Planning & Implementation | Oversight of EM&V | Coordinate Technical Services | Total Hours |
| NV5 | Gretchen Calcagni | Principal in Charge/Project Lead | 380 | 470 | 15 | 35 | 900 |
| | Adrian Caesar | C&I Lead, Technical Services Lead | 300 | 350 | | 50 | 700 |
| | Griff Keating | Planning & Analysis Lead and Residential and Low Income Core Member | 375 | 425 | 40 | 10 | 850 |
| | Adam Jacobs | C&I Core Member and SME: Grid Planning, Regulatory Proceedings, Policy | 225 | 275 | | | 500 |
| | Aldo Mazzaferro | SME: Clean Energy Financing | 25 | | | | 25 |
| | Dave Ray | SME: Building Performance Standards, Sustainability | 25 | | | | 25 |
| | Mike Borger | SME: Solar and Battery Storage, Microgrids | 25 | | | | 25 |
| | Matt Socks | SME: AESC Study, Potential Studies, TRM, Codes | 100 | | 50 | | 150 |
| | Senior Associate | Senior Associate Support | 135 | 165 | | | 300 |
| | Associate | Associate Support | 275 | 330 | | 225 | 830 |
| Individuals | Jeff Schlegel | SME: Active Demand, Avoided Cost study, ISO issues, Policy | 75 | 25 | | | 100 |
| | Ralph Prahl | EM&V Lead | | | 650 | | 650 |
| | Bob Wirtshafter | EM&V Core Member | | | 175 | | 175 |
| | Ken Seiden | EM&V Core Member | | | 200 | | 200 |
| BuildingMetrics | Peter Jacobs | EM&V Core Member | | | 130 | | 130 |
| Caerbannog | George Lawrence | SME: C&I Program Design, Energy Management Systems | 20 | 30 | | | 50 |
| CEI | Margaret Lynch | Residential and Low Income Lead | 305 | 370 | | | 675 |
| GDR Consulting | Glenn Reed | Residential and Low Income Core Member | 135 | 165 | | | 300 |
| JLC | Jennifer Chiodo | C&I Core Member and EM&V Core Member | 170 | 200 | 130 | | 500 |
| Responseab | Ralph Francois | SME: Website Development and Design | | | | 150 | 150 |
| | Labor Totals | Hours | 2,570 | 2,805 | 1,390 | 470 | 7,235 |
| | | Amount | $598,510 | $646,075 | $329,635 | $75,865 | $1,650,085 |
| | | Travel | $4,000 | $3,000 | $0 | $0 | **$7,000** |
| | | DIRECT COSTS TOTAL | $4,000 | $3,000 | $0 | $0 | $7,000 |
| | | TOTALS | $602,510 | $649,075 | $329,635 | $75,865 | $1,657,085 |