EQUITY WORKING GROUP (EWG)
MEETING MINUTES

Monday, August 3, 2026
Virtual Meeting: Zoom

Equity Working Group Members Present: Jo Ann Bodemer for Commissioner Elizabeth Mahony, Kim Dragoo, Sonakshi Saxena, Doug Quattrochi, Briana Kane (for Margaret Song), Kyle Murray, Margie Lynch, Emily Audet (for Alexis Washburn), James Collins, Brooks Winner, Sean Davenport, Mary Wambui, Grace Umana, Stephanie Terach

Equity Working Group Members Absent: Charlie Harak, Adrian Caesar

Other Attendees: Jordan Galluzzo, Ina Dasso, Elischia Fludd, Chris Lavallee, Amy Vavak, Bernetta Morton, Bob Eckel, Brian Beote, Brian Greenfield, Chris McClellan, Courtney Foster, Dominique Agnew, Elizabeth Cleveland, Griff Keating, Hema Pawe, Julie Barbour-Issa, Kate Peters, Katherine Straus, Kim Dragoo, Kimberly Cullianne, Leah Cohen, Lindsay Henderson, Lucy Fox, Martha Grover, Melody Abedinejad, Quiana Lee-Gaines, Ryan Barry, Sophie Protano, Tarshia Green-Williams, Taylor Buck, Zack Lippert

1. Call to Order

Bodemer, acting on behalf of the Chair, called the meeting to order at 11:02 AM.

Virtual Meeting Procedure
Bodemer reviewed the virtual EEAC meeting procedure:

1. The Council meeting would be recorded, for administrative purposes only.
2. All attendees except for Councilors and presenters would remain muted for the duration of the meeting.
3. Councilors should hold comments until the end of presentations, but Councilors and other participants should speak instead of using any chat function.
4. Councilors who disconnect from meetings need to announce when they rejoin.
5. All Council votes would be taken by roll call.

2. Public Comment

Alisha Harrington (Browing the Green Space)
Harrington said that fair chance hiring should remain a central focus of the EWG and encouraged the group to take a leadership role in ensuring that the issue does not take a back seat to other priorities during development of the next Plan. Harrington said that fair chance hiring is critical to achieving broader equity goals and urged the EWG to conduct a thorough review of the report submitted by the Program Administrators (PAs) in January. Harrington said that, on behalf of the Coalition for CORI Climate Inclusion, there are concerns that current policies are not fully aligned with fair chance hiring objectives. Harrington said that the EWG should engage in a deeper discussion about what fair chance hiring means in practice, including the standards used to assess fitness for different job opportunities, and carefully examine the contents of the January report. Harrington said that addressing these issues should be a priority because current misalignment limits the ability to expand opportunities and access for individuals with CORI histories and creates challenges for organizations seeking to implement fair chance hiring initiatives.

3. EWG Business and Updates

May 4, 2026, EWG Meeting Minutes
Bodemer asked if the EWG had any revisions to the May EWG minutes. No EWG members proposed edits. DOER, as Chair of the EWG, approved the May EWG meeting minutes as submitted.

DOER Updates
Bodemer said that the next workshop will be held on August 27 and that EWG members who are not EEAC Councilors are invited to attend, noting that EWG participation and perspectives are valued and appreciated. Bodemer said that the workshop will focus on Low-Income and C&I programs, including the small business component, which is also an important equity issue. Bodemer said that equity is integrated throughout the EEAC planning process and will be addressed during each workshop. Bodemer emphasized that it is important for the EWG as a whole to participate in the workshops and said that upcoming EWG meetings will be critical to developing recommendations for inclusion in the EEAC's recommendations to the PAs for the 2028-2030 Plan.

4. 2028-2030 Planning: Small Business Offer

PA Presentation
Terach, on behalf of the PAs, presented on the small business offer, including the background of the offer, the performance of the offer to date, how the offer operates in Designated Equity Communities (DECs) versus non-DECs, and a straw proposal for the 2028-2030 Three-Year Plan.

EWG Discussion
Bodemer asked whether the PAs have 2025 data comparing small business participation within DECs to participation outside DECs, noting that the DEC-focused outreach effort may have influenced participation rates. Terach said that the PAs do not yet have that information across all utilities.

Murray said that microbusinesses appear to account for more than 50% of program benefits and asked why that segment has performed so strongly, specifically inquiring if it was due to building characteristics, a lack of prior upgrades, or other factors. Terach said that the PAs specifically target microbusinesses through a turnkey offering and noted that many microbusinesses do not have facilities managers dedicated to reviewing utility bills or identifying operational efficiencies, so providing those services directly may be contributing to higher participation and savings. Lippert said that both small businesses and microbusinesses contribute significantly to overall results and represent the majority of participating customers. Lippert said that dedicated outreach, increased incentives and support, and a greater focus on comprehensive projects have contributed to performance gains. Lippert said that the programs previously emphasized quick-hit lighting projects but have increasingly focused on deeper efficiency measures, with vendors trained to take a more holistic approach to energy efficiency. Lippert said that this represents a shift from earlier years when larger C&I customers generated a greater share of program benefits, which may reflect the fact that many of the most straightforward opportunities in that market have already been addressed.

Quattrochi asked whether the reported savings are estimated or measured. Lippert said that the figures represent claimed program savings and are based on a combination of modeled assumptions and prescriptive measures, and evaluation teams conduct sampling to assess model accuracy and then apply impact factors, realization rates, and net-to-gross factors across the broader participant population. Quattrochi asked whether there may be opportunities to improve efficiency in DEC small business spaces through upgrades to doors and entryways. Lippert said that the PAs currently offer industrial air curtains for loading docks and previously evaluated air curtains for standard entry doors, although that measure did not pass cost-effectiveness screening at the time, but the screening could be revisited. Quattrochi said that local convenience stores and similar businesses may present opportunities to reduce energy losses caused by frequent door openings. Bodemer asked whether there is data on energy losses associated with frequently opened doors in small businesses. Lippert said that he is not aware of any PA studies on the topic but noted that relevant third-party research exists from organizations such as the U.S. Department of Energy.

Bodemer said that the PAs are considering a special offer for mixed-use buildings in addition to exploring a third target segment beyond small businesses and nonprofits and asked EWG members which option they would prioritize if only one could move forward.

Winner said that he supports a mixed-use building offer or, at minimum, a clearer pathway for mixed-use buildings to participate in programs. Winner said that he was encouraged to hear that the concept is being considered as part of future planning discussions.

Murray said that he also supports a mixed-use building offer unless another opportunity with greater potential benefits is identified.

Bodemer said that she is also interested in a mixed-use building offering and believes the program could be creative in serving both residential and commercial customers through that approach.

Wambui said that she was uncertain what a mixed-use offering would entail and noted that she manages a portfolio containing many mixed-use buildings. Terach said that the PAs have not yet developed a specific proposal but are continuing to explore the concept. Terach said that mixed-use buildings often include small business tenants on the ground floor and residential units above, and the goal would be to develop a package that serves the entire building. Terach said that this could include coordinated delivery approaches, such as a single contractor completing weatherization work throughout the building. Bodemer said that while the details have not yet been developed, smaller mixed-use buildings are likely underrepresented in current programs and may warrant a targeted offering to increase participation.

Lippert said that mixed-use buildings can be difficult to serve because commercial and residential components are often managed through different delivery channels and vendors, requiring savings to be allocated across multiple programs. Lippert said that the intent of a mixed-use building offering would be to streamline participation and better align program delivery with the needs of those customers, noting that these challenges became more evident as programs evolved beyond their earlier focus on lighting measures.

Winner said that Boston has previously attempted to serve mixed-use buildings through targeted campaigns but achieved limited success when residential and commercial services were delivered separately. Winner said that he would welcome efforts by the PAs to streamline service delivery for these buildings, and mixed-use buildings also represent an important opportunity to reach renters on both the Residential and Commercial sides of the market.

5. 2028-2030 Planning: Strategic Renter Plan

PA Presentation

Lavallee, on behalf of the PAs, presented on the Strategic Renter Plan, including partnership strategies, marketing strategies, and program delivery strategies.

EWG Discussion

Winner said that he appreciates the PAs including information on strategies that were unsuccessful, noting that understanding what did not work is valuable for identifying lessons learned and informing future program design. Winner said that one of the most successful partnerships developed through CFP efforts has been with the Boston Housing Authority, which administers Section 8 vouchers and maintains contact with thousands of Low-Income renters. Winner said that a joint webinar conducted earlier in the year generated hundreds of leads and suggested that strategic partnerships of this type could support targeted outreach efforts.

Lynch asked whether Section 8 vouchers are available to households earning up to 80% of area median income, while Mass Save eligibility is generally limited to 60%. Winner said that he was not certain but believed that was correct. Lynch said that this could present an opportunity to reach Moderate-Income customers as well. Lynch also said that properties receiving Section 8 vouchers must meet certain standards to protect tenants and noted that the point at which landlords are notified of those requirements could serve as an effective entry point for Mass Save engagement.

Quattrochi said that Boston 311 data show a significant number of unresolved heating-related complaints. Quattrochi said that inspection services are often denied access in these situations, but Mass Save vendors may be more readily welcomed because they are not conducting broader inspections. Quattrochi said that there may be opportunities for targeted outreach to households experiencing unresolved heating issues and suggested exploring a collaboration with inspectional services departments, noting that similar data are likely available in other municipalities.

Wambui said that this type of information is one reason she has supported Community First Partnerships (CFPs), as municipalities often have access to data that could support targeted outreach efforts. Wambui said that additional work may be needed to ensure municipalities are willing and able to share those data resources.

Collins said that the partnership with the Boston Housing Authority has been successful and that most of the tenants reached through the effort fall within the Income Eligible category despite the higher Section 8 income threshold. Collins said that housing authorities provide important connections to Low-Income communities and can help facilitate outreach, and coordinating inspections and program delivery alongside other housing services can be challenging. Collins added that CAP agencies working in partnerships with the PAs are often able to assist households experiencing heating emergencies and generally maintain strong relationships with their customers.

Umana asked whether the bullet about increasing participation among Spanish- and Portuguese-speaking customers represented established outcomes or program goals. Lavallee said that these are goals and noted that performance data are available and that future progress will be supported through the Language Access Plan. Umana asked about the purpose of the partnership with Residential Assistance for Families in Transition (RAFT). McClellan said that the relevant subject matter expert was no longer available to answer the question and that the PAs would follow up. Quattrochi said that the partnership was intended to increase awareness of Mass Save and RAFT services by cross promoting the programs. Umana said that it would be worthwhile to revisit the partnership because customers seeking assistance through RAFT are often also referred to CAP agencies. Umana also asked what renter and tenant protections are built into the program to ensure participants feel comfortable engaging with services and noted that similar considerations would apply to any future small business offerings. Bodemer suggested that Umana and Quattrochi continue that discussion offline, noting that Quattrochi played a significant role in developing and implementing renter protections.

Winner said that municipal rental registries may represent another valuable data source for targeted outreach, noting that Boston has not yet used rental registry information to support Mass Save outreach but plans to begin doing so in the fall. Winner said that similar datasets may exist in other CFP communities and could help improve engagement with renters.

Quattrochi said that inspectional services data are publicly available by address and reiterated that most heating-related complaints do not appear to have been resolved through long-term solutions. Quattrochi said that this represents a significant opportunity for Mass Save outreach and suggested that many property owners may have implemented only temporary fixes.

Quattrochi agreed with Winner that municipalities possess valuable datasets that have not yet been fully leveraged to support program participation.

6. 2028-2030 Planning: Designated Equity Communities and Equity Priority Populations

Discussion Questions
Bodemer, on behalf of DOER, presented discussion questions relating to priority customer segments, priority outcomes, affordability, and heat pumps for existing gas Low- to Moderate-Income (LMI) customers.

EWG Discussion
Murray said that participation rates have increased across all three sectors and that the additional effort invested in the DECs initiative appears to be producing meaningful results. Murray said that his answers to all three questions posed on slide 3 were yes.

Winner and Collins said that their answers to all three questions on slide 3 were also yes.

Quattrochi said that one downside of the DECs approach is that communities not designated as DECs may feel excluded and develop a less favorable perception of Mass Save. Quattrochi said that expanding the program could help address those concerns and suggested that a more targeted geographic approach, such as using zip codes, may allow additional communities to be included.

Murray said that he would like to see the program expanded to serve more communities but noted that budget constraints remain a significant consideration. Murray said that he would be happy to discuss the program's demonstrated successes with anyone interested in learning more.

Collins said that the offers available to Low-Income customers remain the same statewide regardless of whether they live in a DEC. Bodemer confirmed that the differences between DEC and non-DEC offerings are minimal for Low-Income customers.

Audet said that limited information has been provided regarding language access and suggested that the Council consider whether accounting for non-English-speaking populations would affect how DECs are identified.

Wambui said that it is important to remember that DECs were selected through a deliberate process, and it was intended to be a distributive justice measure, noting that the initiative has not yet fully achieved its intended impact. Wambui said that she would caution against expanding the program to additional communities at this stage. Wambui said that language access should receive greater attention in the next Plan, noting that language access funding appears to be underspent, but added that she does not believe language considerations would significantly alter DEC designations. Bodemer said that language access should be delivered robustly throughout the Commonwealth to ensure all customers can participate and added that there may be legal considerations related to screening communities based on language characteristics.

Quattrochi said that he would like to see greater efforts to ensure legislators understand the benefits of Mass Save, noting that many may not realize how many of their constituents have

benefited from the programs. Quattrochi said that increasing awareness among elected officials should be considered during development of the next Plan.

Wambui said that communities that have historically been underserved continue to need a strong focus on efficiency measures, including weatherization and knob-and-tube wiring remediation. Wambui said that she would also like to see the next Three-Year Plan place greater emphasis on identifying customers using electric resistance heating and converting those households to heat pumps. Wambui said that emerging research indicates these conversions can generate significant savings, particularly for vulnerable households.

Quattrochi said that converting customers from electric resistance heating and delivered fuels to heat pumps could have a significant impact during the next Plan term. Quattrochi requested additional analysis of the cooling-related benefits of heat pumps, noting that window air conditioners are often inefficient and expensive to operate. Keating said that research indicates customers tend to use permanent cooling technologies more frequently which can offset the added efficiency, but heat pumps provide peak energy savings for cooling. Keating said that heat pumps currently would not qualify solely as a cooling efficiency measure under existing screening approaches.

Collins said that he agreed with Wambui's earlier point regarding the importance of providing robust support services wherever possible, particularly within the Low-Income sector. Collins said that outreach efforts, marketing, and policy design should continue focusing on customers using delivered fuels and electric resistance heating. Collins said that maximizing services during the initial customer interaction is important because it can be difficult to reengage customers later and deliver additional efficiency measures if they feel their initial service was not comprehensive.

Winner said that he generally agreed with Wambui's comments but would approach the issue from a slightly different perspective. Winner said that energy efficiency should remain the foundation of the DECs approach, but that targeted beneficial electrification should also be a key component, particularly from a distributive justice standpoint, because much of the current program investment is tied to electrification. Winner said that broadly excluding large segments of DEC customers from electrification opportunities because of program costs or concerns about bill savings could limit the ability to close equity gaps. Winner said that future DEC offers should continue emphasizing efficiency by ensuring that buildings and customers that have not previously received services are prioritized, while also taking a thoughtful and targeted approach to electrification that allows more residents to benefit from the programs. Winner said that particular focus should be placed on fuel switching from oil and electric resistance heating, though not exclusively. Winner said that CFPs in DECs may provide an opportunity to support customers through services such as energy advocates who can help evaluate operating costs and use of heat pump rates to reduce the risk of higher energy bills following fuel switching. Bodemer said that she was unsure what percentage of homes and apartments within the DECs currently rely on electric resistance heating but suggested that there may be an opportunity to incorporate elements of both approaches. Bodemer said that a special offer for LMI customers using electric resistance heat could potentially be implemented statewide, noting that switching customers away from electric resistance heating is a clear affordability measure. Bodemer said

that additional information would be needed regarding the demographics and geographic distribution of electric resistance heating across the Commonwealth. Winner said that he could speak to conditions in Boston, noting that analysis conducted with Eversource and National Grid last year identified approximately 1,575 electric resistance-heated buildings with 30 units or fewer in the city. Winner said that, by comparison, there are roughly 10,000 similarly sized buildings in Boston that continue to rely on delivered fuels for heating. Bodemer asked what share of those buildings are predominantly LMI properties, noting that this would be an important area for further analysis.

Wambui clarified that her comments were not intended to suggest that any customer groups should be excluded from electrification opportunities, but that energy efficiency must remain the foundation of the program because Mass Save is fundamentally an energy efficiency program and electrification efforts should build upon that foundation. Wambui said that the Commonwealth should develop a broader strategy for transitioning customers from electric resistance heating to heat pumps, noting that electric resistance heating creates both affordability and electric load challenges. Wambui said that Mass Save operates with a limited pool of ratepayer funds and must prioritize investments that provide value to ratepayers and help maintain public support for the program, and she expressed support for Bodemer's suggestion of a specific offer targeting customers with electric resistance heating.

Quattrochi said that if customers are increasing their use of cooling because heat pumps are more efficient, then the program should also consider quality-of-life benefits and avoided emissions costs when evaluating impacts. Quattrochi referenced research presented by Dr. Destenie Nock at a prior meeting that identified opportunities to recognize customers experiencing financial hardship through analysis of utility bill data and suggested that similar approaches should be explored in the next Plan. Keating said that the program already accounts for cooling-related benefits in some ways and agreed that identifying customers who may be struggling based on utility bill patterns is an interesting concept. Quattrochi said that, given the current political environment, it will be important to ensure that Mass Save investments do not contribute to increased rent burdens or energy burdens. Quattrochi suggested that landlords could potentially assume responsibility for utility bills and incorporate a fixed amount into rent based on historical utility costs, provided that renters do not ultimately pay more.

Winner said that the program should continue emphasizing protections against increased energy burdens for renters but should take a more targeted approach rather than relying on broad assumptions or exclusions, noting that the current structure effectively creates a blanket exclusion from certain DEC offers for gas-heated rental buildings. Winner said that, rather than prohibiting electrification upgrades for gas-heated buildings, the focus should be on establishing safeguards that prevent energy burdens from increasing following those upgrades, stating that broad exclusions risk leaving renters on gas systems that may become increasingly expensive over time. Bodemer asked whether an informed consent approach could help address concerns regarding potential energy burden impacts.

Wambui said that energy affordability should be defined more broadly in the next Plan as both reducing utility bills and removing barriers that prevent families from accessing available measures and services. Wambui said that access barriers within the Income Eligible program

continue to create challenges and should be considered part of the affordability discussion and suggested that the DPU consider extending the heat pump rate to Income Eligible customers during the summer months.

Umana asked whether the EWG had previously developed a formal definition of energy affordability that could inform future discussions. Bodemer said that the EWG has not formally defined the concept but has generally operated under the principle that Mass Save interventions should not result in higher utility bills. Umana said that affordability extends beyond Mass Save programs because some customers face higher costs from third-party suppliers despite receiving efficiency incentives, and these broader affordability issues should also be considered. Bodemer said that bill reviews and supplier-related issues are not traditional Mass Save functions but are closely related to affordability concerns and are being discussed by the PAs.

Collins expressed support for extending the heat pump rate to Income Eligible customers during the summer. Collins said that discussions about heat pumps often focus on design and installation, but operation of the equipment is often the most significant variable affecting customer outcomes. Collins said that customers transitioning from gas systems may experience higher costs if heat pumps are not used effectively, but those impacts can often be mitigated through proper customer education and active management of the technology.

Murray said that, while additional protections may be needed, it is important to ensure that LMI gas customers have meaningful opportunities to install heat pumps. Murray said that failing to provide those opportunities could leave those customers on increasingly expensive gas systems, creating the worst possible outcome from an affordability perspective. Murray said that the Commonwealth will likely need to take additional steps to facilitate the transition beyond what can be accomplished through Mass Save and suggested engaging with the Office of Energy Transformation on the issue.

Quattrochi said that the PAs should explore whether there are opportunities to target problematic gas infrastructure within DEC areas for electrification efforts. Quattrochi said that replacing those systems with heat pumps could benefit both the utilities and participating customers and may provide useful information for future planning efforts.

7. Adjournment

Bodemer, acting on behalf of the Chair, adjourned the meeting at 12:59 PM.

Meeting Materials:

- Official Meeting Notice
- Meeting Link
- Agenda
- May 4, 2026 EEAC Equity Working Group Meeting Minutes – DRAFT
- Small Business Offer Presentation
- Mass Save Strategic Renters Plan Presentation
- Designated Equity Communities and Equity Priority Populations Presentation

- Massachusetts Strategic Renters Plan