

MA EEAC Equity Working Group Equity Targets for 2022-2024 Three-Year Plan

The Massachusetts Energy Efficiency Advisory Council (EEAC) and Program Administrators (PAs) are committed to improving the equitable delivery of energy efficiency programs. In 2020, the EEAC established the Equity Working Group (EWG) to focus attention on customer groups identified through analysis of nonparticipants. Based on this evaluation research, the EEAC identified underservice to moderate-income customers, renters and landlords, households with a primary language other than English, and small businesses when compared to other program participants. The EWG agrees that it should be priority of the Mass Save® programs to remedy past underservice in order to ensure program equity moving forward. The EWG also recognizes that equitable decarbonization also prevents customers and communities historically underserved from being further left behind.

The EWG is comprised of voting EEAC Councilors, representatives of the PAs and the Low-Income Energy Affordability Network (LEAN), representatives of environmental justice organizations, and the EEAC Consultants. (Appendix A provides the EWG membership with affiliations.) The EWG has worked collaboratively with stakeholders and other members of the public who have called for more equitable delivery of services over the years.

The EWG has developed the following targets for the consideration of the full EEAC in order to guide investments in equity and assess performance in the 2022-2024 Energy Efficiency Plan. The EWG understands that the framework that is crafted today, at the beginning of this important journey for a new three-year plan, is a starting point. As the EEAC learns throughout the implementation process, it may find that metrics will need to change over time. All members of the EWG have agreed, through a consensus-based discussion, to these targets.

Principles

- Targets are results-oriented and time-bound.
- Targets are established statewide except for EJ Communities, which are established individually for each PA.
- PAs will report on equity efforts in quarterly report narratives.
- Targets are year-over-year unless otherwise stated. When performance in an early year exceeds a percent increase goal, baseline will not change, and overage can count toward later year targets.
- Participants can and should be counted in as many customer segments as appropriate (e.g., a moderate-income renter household will show up in participant counts for both moderate-income and renter).
- “Environmental Justice Municipalities” will be defined for the purposes of this framework as: [PA-served communities where (1) greater than 33% of the population resides in an environmental justice block group and the municipality (as a whole) meets the EJ municipality’s income criteria and at least one additional criterion (e.g., minority or English isolation) (based on 2020 data posted at state website); and (2) consumption weighted participation rate from the Residential Non-Participant Customer Profile Study does not exceed 30%]. The list of Environmental Justice Municipalities is set forth at Appendix B.

EJ Municipalities

- Increase Plan over Plan investment¹ by each PA in Environmental Justice Municipalities. Percent increases will be established for each PA and each sector separately.²
- Increase number of participants in Environmental Justice Municipalities Plan over Plan by a percent to be set for each PA individually.
- Baselines to be established using 2019-2021 actual data normalized with the 2022-2024 BCR model with lighting removed from the baseline and actuals.
- Data to be reported annually in the Q4 report.

Workforce

- Conduct EM&V study and share initial results in 2022 to analyze whether and to what extent substantial disparities exist between the availability and PA utilization of state-certified minority and woman-owned business enterprises (M/WBE) in procurement for lead vendors and subcontractors by the PAs (statewide and individually) related to energy efficiency programs and services, including actionable recommendations for how to increase both the availability and PA utilization.
- Over the three-year term, at least 120 people will complete training and be placed in relevant industry positions through Clean Energy Pathways, with at least 90 people being Women, Black, Indigenous, or People of Color, fluent in language(s) other than English, and/or from EJ block groups at time of enrollment. PAs will emphasize the value of retention to the measurable success of Clean Energy Pathways and will study success in achieving retention in both training and job placement in the evaluation of the program.
- PAs will track and report annually on the number of M/WBEs contracts and spend for contracts that are directly between PAs and vendors that are M/WBEs and also report total number and spend of all direct contracts.
- PAs will hold at least two workshops per year for contractors to provide education on PA programs in order to increase ability of new M/WBE vendors to participate; PAs to target advertising for the workshop to likely M/WBE contractors.
- At least once per year, the PAs will perform direct targeted outreach to all Massachusetts-certified M/WBEs listed in the Massachusetts Supplier Diversity Office's Directory of Certified Businesses with a Description of Services that indicates that they provide services or equipment that are likely eligible for Mass Save contracts, subcontracts, or incentives. A description of the outreach methods and number and types of businesses contacted will be reported annually in the Q4 report.

Partnerships

- Partnerships with municipalities, community organizations, or business associations will be established in at least 75% of Environmental Justice Municipalities. These partnerships may be

¹ "Plan over Plan" is 2019-2021 compared to 2022-2024. "Investment" is defined as incentives and money spent for Clean Energy Pathways internships, Municipal Partners, targeted marketing, and other direct/geographically targeted investments.

² PAs will gather and report data on 2019-2021 EJ investment by PA and by sector by the end of Q1 in 2022. Percent increases will be established by the EEAC and PAs by the end of Q2 in 2022.

formal “Municipal and Community Partnership” arrangements or other partnerships³ outside of that program that aim to improve service to one or more of the identified underserved customer groups.

- Track and report annually the number of customer accounts participating and units served in the PA programs in the established Municipal and Community Partnerships municipalities, broken out and reported by sector and by renters, moderate-income qualified, English-isolated customers, and small business turnkey.
- Track and report annually the number of outreach activities (marketing campaigns, events, community engagements, etc.) initiated and completed by Municipal and Community Partner for each underserved customer segment focused on by each Partner (renter, moderate-income, English-isolated, and small/microbusiness).
- Track and report annually the level of program investment (award amount) for each Partnership Team and which segments each Partnership Team is focusing their efforts on.

Renters

- Increase renter unit participation by 24% from 2021 to 2024, achieved as an increase of 7% in 2022, 7.5% in 2023, and 8% in 2023 in RCD (baseline to be established using 2021 actual data normalized with the 2022-2024 BCR model). PAs will prepare a strategic plan with detailed examples of how the PAs will serve renters, with a draft by the end of Q2 2022, and a final by the end of Q3 2022.
- Increase number of renter units served in attached low-rise buildings by at least 16% from 2022 to 2024, achieved as an increase of 8% year over year for both Residential RCD and Income Eligible Coordinated Delivery, which shall be reported separately (2022 to be baseline year). Report separately the number of attached low-rise projects that are 25+ units.
- Data to be reported twice each year.

Moderate Income

- Increase number of moderate-income weatherization jobs by 700% from baseline to 2024, achieved as an increase of 100% year over year (baseline to be established using 2019 actual data).
- Increase number of moderate-income heating systems replaced by 56% from 2022 to 2024, achieved as an increase of 25% year over year (2022 to be baseline year).
- Data to be reported quarterly.

English Isolated⁴

- Increase number of participants who receive a Home Energy Assessment (HEA) in Residential Coordinated Delivery or online assessment, or energy assessment in Income Eligible Coordinated Delivery, in Spanish or Portuguese by 21% from 2022 to 2024, achieved as an

³ Partnerships may include municipalities or regional or community-based organizations with which the PAs have established cooperative agreements to collaborate, including through memorandums of understanding and/or memorandums of agreement. Partnerships are also intended to focus on increasing energy efficiency services, including K-12 and vocational education, electrification, and energy burden reduction, as identified by and targeted toward historically underserved populations.

⁴ Defined as households in which no one 14 and over speaks English only or speaks a language other than English at home and speaks English very well.

increase of 10% year over year in Residential and Income Eligible sectors, which sectors shall be reported separately (2022 to be baseline year). Data to be reported twice each year.

- Increase by 10% from 2022 to 2024, achieved as an increase of 5% year over year the number of participants who receive weatherization after receiving an HEA in Residential Coordinated Delivery or energy assessment in Income Eligible Coordinated Delivery in Spanish or Portuguese (2022 to be baseline year). Data to be reported twice each year.
- A Mass Save Language Access Plan will be developed, with analysis completed in 2022 for Residential Coordinated Delivery and Income Eligible Coordinated Delivery, and implementation commencing by the end of the second quarter of 2023. The full Language Access Plan will be completed by the end of Q1 2024. The Plan will address how customers are to be served in their preferred language, and will coordinate PA language resources to allow PAs, lead vendors, contractors, and suppliers to access needed translation and interpretation services.
- By the end of 2024, the PAs will be able to offer Home Energy Assessments (either performed by a fluent contractor or with an interpreter) in five languages other than English, which are currently expected to be Spanish, Portuguese, Mandarin, Cantonese, and Haitian Creole.

Small Business

- Complete 600 small business weatherization projects in 2022, 700 in 2023, and 800 in 2024.
- By 2024, complete a repeat of the C&I 2020 nonparticipant study to analyze participation rates of small and microbusinesses (including small nonprofit organizations) and study barriers to participation. Comparing results of the 2020 and the 2024 studies, increase the percentage of population savings achieved (combined for electric and gas) for non-lighting end uses among microbusinesses by 5%.

Appendix A: MA EEAC Equity Working Group Members, with Affiliations

Name	Position
Maggie McCarey	DOER
Alexis Washburn	DOER
Cindy Arcate	Representing Massachusetts Non-Profits
Charlie Harak	Representing Organized Labor
Cammy Peterson (Chair)	Representing Commonwealth Cities & Towns
Mary Wambui (Chair)	Representing Residential Consumers
Jo Ann Bodemer	AGO
Amanda Formica	National Grid
Ruth Georges	Eversource
Stephanie Terach	Liberty Utilities
Margaret Downey	Cape Light Compact
Brian Beote	Action Inc.
James Collins	ABCD
Elizabeth Chant	EEAC Consultant
Margie Lynch	EEAC Consultant
Crystal Johnson	EEAC Consultant
Eugenia Gibbons	Healthcare Without Harm/Green Justice Coalition
Caitlin Peale Sloan	Conservation Law Foundation
Andrew Yarrows	Conservation Law Foundation
Cindy Luppi	Clean Water Action/Green Justice Coalition

Appendix B: Environmental Justice Municipalities

- Attleboro
- Boston (select zip codes, see below)
 - Allston 02134
 - Brighton 02135
 - Dorchester 02121
 - Dorchester 02122
 - Dorchester 02124
 - Dorchester 02125
 - East Boston 02128
 - Fenway/Longwood 02115
 - Mattapan 02126
 - Mission Hill 02120
 - Roxbury 02119
- Brockton
- Chelsea
- Chicopee
- Eastham
- Everett
- Fall River
- Fitchburg
- Gardner
- Gloucester
- Great Barrington
- Haverhill
- Holbrook
- Lawrence
- Lowell
- Lynn
- Malden
- Methuen
- Montague
- New Bedford
- North Adams
- Northampton
- Palmer
- Peabody
- Pittsfield
- Quincy
- Randolph
- Revere
- Southbridge
- Springfield
- Stoughton
- Taunton
- Wareham
- Webster
- West Springfield
- Williamstown
- Worcester