



DRAFT Meeting Summary

January 12, 2020
Virtual Meeting via Zoom

Participants: Over 130 people attended the workshop including 22 Councilors. A list of Councilors in attendance, Presenters (EEAC Consultants and Program Administrators), and Equity Working Group members is included in the Appendix. The workshop background material and presentations can be found at <https://ma-eeac.org/january-12-workshop-5-existing-buildings-equity/>

WORKSHOP OVERVIEW

Maggie McCarey, DOER Energy Efficiency Division Director and EEAC Chair, welcomed participants. She reminded everyone that the goal of this EEAC workshop series is to develop a set of consensus recommendations for PAs to address in the development of their next 3-year plan. She then said that there will not be public comment at this workshop, as there have been six dedicated public listening sessions for public comments to be posted to the EEAC website. Finally, she conducted roll call.

Dr. Jonathan Raab, facilitator at Raab Associates, provided an overview of the Groundrules and the approach to making recommendations, which can be found in the meeting materials at the link above (“MA EEAC 2020 Workshop Protocols and Groundrules”).

He noted a few differences with this workshop and the process leading up to it. For this workshop, the recommendations grew out of an extensive Equity Work Group (EWG) process, comprised of Councilors and other EWG members, as well as a consultation process with community members. Seventy recommendations were reviewed at this workshop, compared to 15-20 in previous workshops. To facilitate reviewing such a large batch of recommendations, they are grouped together by topic. Finally, in this workshop, some non-EEAC Councilors who are members of the EWG will present recommendations and / or answer questions.

APPROACH TO RECOMMENDATION FRAMING AND DISCUSSION

First, to provide background before presenting recommendations, Alexis Washburn from DOER provided a short presentation on the EEAC Equity Working Group process and stakeholder involvement. EWG Co-Chairs Mary Wambui and Cammy Peterson presented main themes and barriers, followed by time for Councilors to ask clarifying questions on the themes, barriers, and EWG recommendation-development process.

The following approach to recommendation review and discussion was employed throughout the meeting. First an EWG representative (Co-chairs Mary Wambui and Cammy Peterson, Caitlin Peale-Sloan, Cindy Arcate, Ruth Georges, and Jo Ann Bodemer) presented the full list of recommendations for a given equity topic (Moderate Income, Renters/Landlords, Small Business, Limited English Proficiency, Partnerships, and Cross-cutting Recommendations¹). Then the EWG representative/presenter for a given topic returned to the first slide in that topic area and re-presented the group of recommendations. For each slide/group of recommendations, facilitator Jonathan Raab organized the conversation around each recommendation by breaking the discussion into two categories: clarifying questions and comments, and suggested improvements. At the conclusion of all equity themes, and shortly before the workshop adjourned, Jonathan elicited ideas for potential additional recommendations beyond those listed in the briefing document.

BACKGROUND PRESENTATION ON EEAC EQUITY WORKING GROUP – RECOMMENDATION DEVELOPMENT PROCESS/BACKGROUND

To provide Councilors with background, DOER representative and EWG manager Alexis Washburn gave a brief presentation on the EWG purpose, history, membership, and recommendation development process. Commissioner Woodcock provided brief additional remarks thanking Alexis, EWG members and stakeholders for their participation and leadership. The slides are available on the meeting page (linked above).

BACKGROUND PRESENTATION ON THEMES AND BARRIERS

EWG Co-Chairs Mary Wambui and Cammy Peterson provided a brief presentation on the key themes and barriers identified by the EWG, which informed the recommendation development process and the grouping of topics and recommendations for today’s workshop. The slides are available on the meeting page (linked above). Below we summarize Councilor questions on the Co-Chairs’ presentation, organized by theme.

Councilors posed the following clarifying questions on moderate income themes and barriers, with responses from EWG members indented:

- What study supports the assertion that “Current moderate-income rebates, incentives, and financing are not affordable or easily accessible to moderate-income customers” (slide 16, bullet 3) – how do we know that it’s not a lack of marketing or some other cause?

¹ EWG recommendations related to Workforce Development had been presented and discussed at Workshop 4 in December and so were excluded from this Workshop.

- Response: The non-participant study, among other studies, provides data and insights into barriers for moderate income. One plausible conclusion from those studies is that financing is not adequate to meet participation targets.
- Response: Not every theme on this slide is from an evaluation study; the purpose in sharing these themes is to convey what we heard from stakeholders and community members who work directly with customers
- Councilor Emphasized that the EWG process was highly collaborative and brought an expertise in developing both the themes and recommendations.
- With regards to “Customers living in metro areas with a high-cost of living are unable to qualify for the current moderate-income offer” (slide 16, bullet 4) – is this because income is above the 80% threshold, or state income vs. area median income, or weatherization barriers?
 - Response: This bullet acknowledges what we heard from stakeholders, that 80% SMI as a threshold may be too low in a few metro areas with very high costs of living
 - Response: I’ve been looking at area vs. state median income with regards to the \$25B Emergency Rent Relief Act; so far, I’ve found that 80% of state median income is very close to 80% of area median income for Boston, but not in other areas in the state.
- With regards to “Support for enhanced incentives for moderate income customers, including current offer for no-cost weatherization measures” (slide 16, bullet 1) I wanted to clarify my understanding that the EWG hasn’t clarified whether this applies to heating systems
 - Response: We’ll discuss this when we discuss those recommendations later on in the workshop
- How much is 80% of median income for a single person?
 - Response: Roughly speaking, for a family of four, 80% of median income is around \$100,000 for state and \$96,000 for area
- There is a lot of overlap between moderate and low income living in the same buildings; we need to dive into this overlap and integration

Councilors posed the following clarifying questions on renters and landlords themes, with responses from EWG members indented:

- How bad are pre-weatherization barriers? How many people face these barriers? How much \$/customer do we intend to spend?
 - Response: We cannot ignore issues, even if we do not have a study backing barriers; we need to recognize that we don’t have all the answers, but must stay on the journey
 - Response: These themes are consistent with the non-participant study; we decided to create the EWG to find solutions. The group has drilled into the problems and solutions far more comprehensively than the non-participant study.
- Pre-weatherization barriers are health & safety issues. Energy Futures recently published a study on this topic, which found that Massachusetts is a leader, though the state still has work to address particularly in low to moderate income demographics.

Councilors posed the following clarifying questions on small business themes, with responses from EWG members indented:

- What does “overreliance on ‘upstream’ programs limits deeper savings for small businesses” (slide 18, bullet 3) mean?
 - Response: Last November/December, consultants provided a presentation that shows participation in lighting was twice as high as turnkey; the savings were much higher in turnkey. The idea here is to get small business customers interested in non-lighting measures.
- On the “Co-delivery of lighting and non-lighting measures” bullet (slide 18, bullet 4), is the implication that we need to do more non-lighting?
 - Response: My understanding is that small businesses are primarily focused on lighting, so by bundling we could encourage deeper savings.
- What would be the mechanisms to incentivize bundling of lighting and non-lighting?
 - Response: We will cover this in the recommendations portion of the meeting.

Councilors posed the following clarifying questions on Limited English Proficiency (LEP) theme, with responses from EWG members indented:

- We’ve done a lot to address this [LEP generally]. Is this a problem? If so, how have our engagements not been successful?
 - Response: As part of this EWG, we’ve focused on opportunities for improvement, which doesn’t discount existing work. PAs worked with the EWG to show what they’ve done for each of these topics, and where there are areas of improvement.
- Did you look into the issue of multilingual software? There are technical approaches to this barrier.
 - Response: Technical approaches have been here for a long time, but issues persist, which speaks to the need for an EWG and including stakeholders to understand barriers and solutions.

There were no clarifying questions for “Community Partnerships” (slide 20).

MODERATE INCOME – ELIGIBILITY & SERVICES

Moderate Income Eligibility (Caitlin Peale-Sloan, EWG member)

- 1. Expand moderate-income eligibility to include customers from 61-80% SMI or AMI, whichever is greater**
- 2. Revise the income verification process to improve ease of access for moderate-income customers**
 - **Examples include offering:**
 - **Multiple options for income verification, such as automatic qualification in certain EJ communities/geographic areas or using the CA model for fuel assistance (random + targeted verification)**
 - **Establishing eligibility through documented participation in other state income-qualified programs**

Clarifying Questions (Councilor questions. EWG member responses indented).

- If we go up to 80% state median income, and offer free incentives, then we've solved many problems of getting people into the program. Therefore I don't support alternative income verification process because 1) many people will still need to income verify to participate in weatherization program (so lower income people will have higher burden of income verification); 2) what we learned in the Merrimack explosions incentives is that higher income people apply for free incentives more than lower income people (which skews delivery away from lower income); 3) the California model showed the challenge of who to followup and test (which was very costly and timely). 8-12% of participants were not actually eligible (and it's worth noting that they may not have actively tried to game the system, but rather didn't know the full eligibility details). In short, I fully support free services for 80% threshold, but am opposed to alternative income qualification.
 - Response: According to the PAs' website, a family of four qualifies for the current moderate income offer with income ranging from \$75,000-84,000.
- What do we mean by "expand moderate-income eligibility to include customers from 61-80% SMI or AMI"?
 - Response: To clarify, there are two recommendations. The first recommendation is expanding based to include 61-80% *area* median income. Recommendation #3 is about the actual incentives for those customers (i.e., weatherization and heating system replacements).
 - Response: My understanding is that these customers will still be market rate customers, not low income, which means customers will fall into the residential budget not IES budget.
- LEAN supports expanding the income eligibility, and is actively discussing income verification with PAs.
- I'd like to remind people that 80% AMI is considered low-income by HUD. If we shift to 80% for low-income then we'd develop a simpler application than the fuel assistance which is quite rigorous.
- How does the definition of median income work?
 - *Consultant response:* Median income means half of households (not population) are above and half are below.
- Keep in mind that the heart of this discussion is human beings, who are often overburdened in many ways including energy – they may own a home, but are not benefiting from subsidies and are still struggling to make ends meet.
- Support the idea of increasing eligibility. If we spend the minimum amount under the law, and expand the number of people that can apply, we are shifting money around but not getting more people funds. We need to think about whether it makes sense to spend/budget more than is required by law.
- We're in a unique moment in time, and the Green Justice Coalition wants to center the focus around anti-racism and COVID impacts, and residents' ability to afford heat (especially when they're either working from home more, or out of work).

- *PA comment:* Our moderate-income market characterization study showed that 27% of residential customers population fall within the 60% or below group, and 16% of our customers are within the 61-80% threshold. So, if we're looking at raising the amount of incentives, it will have bill impacts for all customers. PAs are largely supportive of these recommendations, but we're looking closely at cost and budget implications for certain moderate-income recommendations, and we've shared our data and thinking with the EWG.
 - *Consultant Response:* To provide numbers to the percentages above, the 16% bracket [of customers within the 61-80% threshold] represents 300,000 people, and to date we've reached 2,000 for weatherization-only incentives since 2016.
- *Consultant Comment:* With regard to recommendation 2, there's no specific strategy recommended; we don't have enough information to make that recommendation specific, but rather we wanted to set a goal to improve the process and access.

Councilor Comments/Suggested Improvements (Moderate Income 1-2)

- On #2, I fully support free services for 80% threshold, but am opposed to alternative income qualification (see explanation above).

Moderate Income Services (Caitlin Peale-Sloan, EWG member)

- 3. Provide no-cost incentives for weatherization, heating system replacements, and appliances to moderate-income customers**
- 4. Allocate funding for pre-weatherization barrier mitigation for moderate-income customers**

Clarifying Questions (Councilor questions. EWG member responses indented).

- For context, the voting Councilors on the EWG were generally in agreement on recommendation #3; the PAs are evaluating how that would impact budgets.
- I'm in favor of #4. On #3, we don't know the magnitude of impact due to income specifically. One of the reasons moderate income participation is low is due to poor credit; for the Heat Loan program, many customers don't qualify – that's why I've been proposing a loan loss reserve program. Another question I have and point I'd like to make is that providing 100% of a new washer/dryer and air conditioner this present an optics problem, especially for single customers making \$60,000. We need to add a requirement to weatherize before offering a 100% incentive.
- For pre-weatherization barrier mitigation, I fully support it, but we'll need to work with DPU on cost-effectiveness. If not adequately monetized, the costs may push the program or sector to be not cost-effective.
- As a reminder, we're not discussing millionaires. Moderate income does not mean wealthy, but rather, someone who needs help. In the context of bill impacts, what are the costs of inequity? We should budget for the inequity of not serving moderate income. We need to expand our thinking. We also need to discuss and budget for electrification.

- Response: There was a lot of discussion in the EWG around 100% for electrification for these customers. Where the EWG started vs. where we ended on this topic was different. The initial discussion by the Green Justice Coalition proposed expanding the offering up to 120% income threshold, and we looked at a number of options like tiering incentives. This recommendation is where we ended up, but for context it shifted throughout the EWG process.
- For context, the original discussion was 120% of median income.
- General support for all four. If we get this wrong, the worst that happens is some people can access incentives who might not otherwise qualify.

Councilor Comments/Suggested Improvements (Renter/Landlord 1-2)

- #3: Require adequate insulation to qualify for no-cost heating system replacement incentives
- #3: Weatherization, if possible, needs to come before other measures

RENTERS/LANDLORDS – MARKETING & OUTREACH AND SERVICES

Renters & Landlords – Marketing & Outreach (Mary Wambui)

1. *Target municipalities with high numbers of rentals*
2. *Use multiple strategies to reach rental property owners and residents*
3. *Develop compelling case for participation by developing case studies when new program offerings become available*
4. *Develop alternative sales and / or delivery models for rental property segment (e.g., landlord association, other 3d party)*

Clarifying Questions (Councilor questions. EWG member responses indented).

- What is the difference between #2 and #4? Should they be combined?
 - Response: If we were going to eliminate one, I would eliminate #2. We need to think through what we learned from talking to stakeholders.
- Need more specificity, not just illustrative examples [is #4 an example of how to implement #2?].
- One of the big issues when we were running MassSave were serving the common areas vs. individual units. Has this issue been resolved?
 - *PA response:* The fundamental need to allocate costs to the correct sector hasn't changed, though billing has improved. Most of the opportunity will be under the landlord's control, especially as lighting incentives go away.
- I support these recommendations. Compelling case studies make a huge difference; NBC shared a story about two families from Chelsea, one of whom had gone through the program and had great success. Case studies spotlight the program through a powerful personal story. This is particularly important because we're talking about gateway cities and intersectional issues.

Councilor Comments/Suggested Improvements (Renter/Landlord 1-4)

- Consider combining #2 and #4 (with #4 as a sub-recommendation to #2)
- On #1, consider expanding or adding a new recommendation to “Target rental buildings with high energy usage”

Renters & Landlords – Services (Mary Wambui)

- 5. Collaborate with rental owners on program design***
- 6. Address pre-weatherization barriers***
- 7. Continue and enhance efforts to provide integrated service delivery with one point of contact for owner***
- 8. Enhance incentives for measure bundles and / or for higher savings levels***
- 9. Employ “closers” who get paid to close comprehensive projects and / or revise Mass Save sales compensation model***
- 10. Provide referral incentives to landlords***
- 11. Develop a marketing offer that combines energy efficiency and other related improvements to attract new program participants***

Clarifying Questions (Councilor questions. EWG member responses indented).

- I’m ecstatic about #10 and #9. For #11, what is meant by “other related improvements”?
 - Response: Usually energy and water efficient toilets are combined. When the owner looks at the full project, they get more excited.
 - Response: Often “other related improvements” are health and safety improvements.
- On #11, would incentives for “other related improvements” be funded through efficiency or another funding stream? The DPU may have issues with funding things like toilets.
 - Response: If the efficiency representative is knowledgeable about comprehensive opportunities, then they’ll be able to better serve the customer and in a more equitable way. That doesn’t mean efficiency has to pay for non-efficiency measures, just that they’re knowledgeable.
- #7 and #9 are very interrelated, packaging measures with one point of contact is critical, particularly for low-income units.
- On #11, could solar fall with the “other related improvements” category?
 - Response: Yes, and funding doesn’t need to come from MassSave’s efficiency program.
 - *PA comment:* It will be challenging to ask the DPU to approve PA vendors to promote non-efficiency measures. Also, PAs are offering the 100% weatherization incentive for all rental units, and this is having an impact for moderate income residents.
 - Response: #11: The PAs are doing well with engaging with landlords, but the challenge is getting customers interested in actually moving forward

- *Consultant Response:* What we heard from stakeholders is that we can use a portfolio management approach as a way to get a foot in the door at the appropriate time, often timed with other planned capital improvements

Councilor Comments/Suggested Improvements (Renter/Landlord 5-11)

- On #9, employ closers for projects more generally, not just comprehensive projects
- On #10, also incentivize rental customers to refer other participants (not just landlords)
- Consider combining #7 and 9
- On #11, better define “other related improvements” such as solar, EV charging, etc.; and clarify what could be funded through efficiency dollars vs. other funding streams

SMALL BUSINESS – OUTREACH, TURNKEY, AND CO-DELIVERY

Small Business – Outreach (Cindy Arcate)

1. *Include small business Main Streets in efforts to serve EJ communities with reduced focus on business parks*
2. *Develop marketing and outreach strategies for commercial landlords to help commercial renters participate*
3. *Bring back dedicated account managers for small business customers*
4. *Allow eligible customers to sign up for turnkey small business audits online*
5. *Expand pool of small business turnkey vendors that employ diverse staff*

Clarifying Questions (Councilor questions. EWG member responses indented).

- Would this focus specifically on EJ communities and not Main Streets more generally?
 - Response: We thought it would be useful to have the Main Streets incorporate into the EJ strategy so that it would be more of a comprehensive strategy.
- Can you elaborate on #3? Is the goal an account manager assigned for every small business?
 - Response: The goal is to counter the movement to have small business customer service more centralized; some strategies could include staffing up, co-sharing accounts with small and large businesses, and changing incentive compensation.
 - Response: The trend to divert a customer to a centralized customer service has impacted large commercial and industrial customers, too. Recognizing the budget impacts, it’s very valuable to have a dedicated account manager or single point of contact.
- We did a small business qualitative study with National Grid and Eversource, which found that many small businesses didn’t think programs related to them; they want personalization. Can #3 be packaged in a way to provide more personalization, perhaps by packaging by customer groupings?
 - Response: Power Options had experts with sector-specific technical expertise, which was one successful approach.

- *PA response:* PAs support the intent of providing more personalization, and we're looking at cost implications depending on how #3 is implemented. National Grid is the only PA with a specific restaurant program.
- On #4, Eversource had online audits for businesses years ago. How did that turn out?
 - *Consultant response:* To clarify, what we meant by “audits online” is not an online or virtual assessment, but rather the ability to go online to sign up for a normal small business turnkey audit.
- Councilor offered to connect participants to association/industry groups.
- *PA comment 1:* #1 and 3 could achieve similar goals with a focus on EJ communities, such as through municipality partnerships. These recommendations speak to PAs' current activities.
- *PA comment 2:* On #4, PAs are working on rolling out an online audit and signup tool.

Councilor Comments/Suggested Improvements (Small Business 1-5)

- On #1, clarify that the focus is specifically EJ communities.
- Flesh out #3 in terms of foci of dedicated account managers (e.g., by type of business, by geography, for EJ communities) and consider in the context of what PAs are already doing.
- Package #3 to provide more personalization (perhaps through customer groupings).
- On #4, clarify that “online” refers to the signup process, not necessarily a virtual audit.

Small Business – Turnkey (Cindy Arcate)

- 6. Improve incentives and financing and standardize offering of turnkey services across PAs*
- 7. Reduce reliance on upstream programs for small business*
- 8. Enhance opportunities for deeper savings for underserved customers*
- 9. Provide “handholding” services to guide customers through audit and installation*

Clarifying Questions (Councilor questions. EWG member responses indented).

- Having small account managers dedicated to small businesses may certainly be more expensive but would pay off. On #9: What do we mean by “handholding”?
 - Response: Similar to the notion of account managers discussed earlier; could be vendors, contractors, partnership with Chamber of Commerce, or peer to peer relationship – the recommendation is a broad concept.
 - *Consultant response 1:* There is no handholding for upstream (i.e., point-of-sale). Related to #7, when you go through a non-turnkey pathway you don't receive handholding; this differs from an audit with recommended measures.
 - *Consultant response 2:* Suggest adding a focus on the entire customer journey from audit to installation to ensure quality control.

Councilor Comments/Suggested Improvements (Small Business 6-9)

- #9: better define what mean by “handholding”—similar to but different from account managers—could be vendors, peer to peer, etc w/focus on entire customer journey from audit to installation

Small Business – Co-Delivery (Cindy Arcate)

- ***10. Bundle lighting and non-lighting measures to deliver comprehensive solutions and deeper savings***
- ***11. Deliver more small business weatherization and address pre-weatherization barriers***
 - ***Incorporate non-energy impacts in measure screening***
- ***12. Deliver more custom measures and compress the level of effort required to design a custom measure***

Clarifying Questions (Councilor questions. EWG member responses indented).

- #11: How big is this opportunity, and how much progress has been made?
 - *Consultant response:* There’s an initiative at DOER to pilot small business weatherization.
 - *PA response:* Cost-effectiveness can be a challenge with small business weatherization; there aren’t non-energy impacts. It’s often easier for small business to start with lighting, then come back for additional upgrades later.
 - *Response:* PAs are contributing MassSave funding and DOER is adding grant funding to highlight strategies to increase weatherization. We expect to have learnings soon. One goal is to develop a tool for audit vendors to make weatherization recommendations at the time of audit. Related, there are many small businesses who are renters, so we see parallel issues to the tenant-owner split across residential and small businesses.
- #11: Are small businesses able to access the same contractors for weatherization as residential, and eligible for the same incentives and measures?
 - *PA response 1:* I believe small businesses and residential customers can access the same contractors
 - *PA response 2:* The incentive portion of this question relates to cost-effectiveness – for residential, measures are more cost-effectiveness than small business weatherization. Offered to show Paul the cost-effectiveness screening tool offline.
- The EWG is aware of cost-effectiveness issues for weatherization, and we need to look at incorporating non-energy impacts into the benefit-cost model, especially in light of our climate goals.

Councilor Comments/Suggested Improvements (Small Business 10-12)

- Continue to analyse cost-effectiveness generally for small business and non-energy benefits in particular
- Evaluate the cost-effectiveness of weatherization for small businesses

LIMITED ENGLISH PROFICIENCY – CUSTOMER JOURNEY, EASE OF PARTICIPATION, COMMUNITY CONNECTION, AND WORKFORCE DEVELOPMENT

Limited English Proficiency – Journey (Ruth Georges, Eversource)

1. Create detailed customer journey maps

- *Illustrate individual journeys for each program within IES, Residential, and C&I, and for different customer types, including owners, tenants, property owners and managers*
- *Identify all points of contact requiring translation and / or interpretation*
- *Catalog language assets available within the full network*
- *Use customer journey maps to establish appropriate expectations among contractors and customers*

2. Identify gaps in resources and develop plan to bridge them through program outreach, design, delivery, and workforce development efforts

Clarifying Questions (Councilor questions. EWG member responses indented).

- LEAN has been doing this as a core responsibility; is this effort being coordinated with CAP agencies and LEAN?
 - *PA Response:* Yes, there's coordination on service delivery, but there's a need for improved coordination for moderate income in particular.
- Are there studies linking LEP as lack of participation? There may be other approaches such as payment for letting people do an audit in their home – most first-generation immigrants have different priorities.
 - *PA response:* The residential non-participant study that the PAs completed in early 2020 included useful data, which looked at LEP, moderate income, renters and landlords – level of awareness and participation. Saw a 2% decrease in participation based on English proficiency. Noted significant overlap between moderate income and renter populations, pointing to overlapping barriers. Renters vs. homeowners had a 9% difference in participation. PAs also commissioned research by Illume for the 2019-2021 portfolio on LEP, which is posted to the EEAC website.
 - *Response:* EWG learned from stakeholders that language (in particular efficiency vernacular) was found to be a barrier across the customer journey.
 - *Response:* We received a lot of feedback on the Spanish translation for “weatherization.” Language is just one element; we must also account for cultural appropriateness.

Councilor Comments/Suggested Improvements (LEP 1-2)

- Consider making audits free for this population.
- Include cultural appropriateness in LEP journey mapping and program planning.

Limited English Proficiency – Participation (Ruth Georges, Eversource)

- 3. Reduce number of steps required to access offers—participation should be seamless**
- 4. Provide immediate pathways to action**
- 5. Provide direct connections to services (e.g., utility supplies electrician to remedy issue) and energy concierge services**
- 6. Standardize and socialize common industry terms**

Clarifying Questions (Councilor questions. EWG member responses indented).

- #5: Has the EWG considered podcasts in different languages?
 - *PA response 2:* The EWG has not explored this, though the non-participant study, which found that outreach channels such as faith- and community-based organizations, radio, and television are more effective ways of communicating with these particular stakeholders. We are in active discussion on other communication means, such as short-clip videos.
 - *PA response 2:* As one example, recent payment assistance webinars were hosted in English, Spanish, and Portuguese. Over 1,000 Spanish and many hundreds of Portuguese customers participated.

Councilor Comments/Suggested Improvements (LEP 3-6)

- On #5, consider podcasts and webinars as an outreach channel

Limited English Proficiency – Community Connection (Ruth Georges, Eversource)

- 7. Enhance connections with community-based groups***
 - Identify and connect with statewide, regional, and local groups that work within non-English communities***
 - Create regular mechanisms for two-way communication***
 - Listen to community-identified needs***
 - Identify and work with community leaders, with compensation for their time, experience, and knowledge***
 - Include community leaders in program planning***
 - Provide resources on a sustained basis to achieve mutual energy efficiency objectives***

8. Leverage community networks to develop necessary cultural competence and build trust with LEP

- **Support and use ethnic / non-English media**
- **Provide feedback on cultural aspects of marketing**
- **Help with intersectional approaches**

Clarifying Questions (Councilor questions. EWG member responses indented).

- Connections with local community is equally valuable as the technical details, particularly to immigrants and people who don't speak English as their primary language. It builds trust, which will boost participation.
- Strongly support these two recommendations – they are the foundational underpinnings to success in reaching this underserved group.
- #7: Add compensation for lead generation and “conversion.” Pointed to Stanford and ACEEE studies that support these recommendations.
 - *PA response:* National Grid is testing relationships with Latinx community center and Cambodian mutual assistance center. We're compensating these groups for co-creation of marketing materials and lead generation.
- #8: What does “intersectional approach” mean?
 - *PA response:* Intersectional approach means it's a multi-layered approach, so language capacity needs to be taken into account.

Councilor Comments/Suggested Improvements (LEP 7-8)

- On #7, add compensation for lead generation and conversion.

Limited English Proficiency – Workforce Development (Ruth Georges, Eversource)

- 9. Address gaps identified in language cataloging**
- 10. Focus recruitment efforts to develop multilingual workforce for all levels**
- 11. Recruit through community-based organizations**
- 12. Create career ladders for multilingual staff; include pay differentials for language / cultural experience**
- 13. Adapt to cultural differences within language groups, based on ethnicity, age, etc.**

There were no clarifying questions or comments for this group of recommendations.

PARTNERSHIPS

Partnerships – Enhancements, slide 1 (Cammy Peterson)

- 1. Ensure incentives and other means of support are adequate to meet partners' needs**
 - **Provide guaranteed financial support at the beginning of the program year to support internal capacity building**

2. *Tie incentives specifically to increases in participation by renters, moderate income customers, and LEP customers*
3. *Enable more different and innovative pathways that partnerships could follow*
 - *Flexible, customized, and targeted approaches to better meet needs of individual communities and priorities within a community*
4. *Create goal-setting and evaluation mechanisms that include partners*

There were no clarifying questions or comments for this group of recommendations.

Partnerships – Enhancements, slide 2 (Cammy Peterson)

5. *Increase the number of participating municipalities and allow municipalities to submit multi-year applications*
6. *Increase access to, transparency around, and granularity of data by:*
 - *Standardizing data collection and reporting across all PAs*
 - *Developing data sharing agreements between program partners and PAs*
 - *Providing regular trainings to interested stakeholders on the Mass Save Data*
 - *Providing support and technical assistance to smaller CBOs as they navigate data*
7. *Give program partners more flexibility to develop marketing materials that will resonate with their community*

There were no clarifying questions for this group of recommendations.

Councilor Comments/Suggested Improvements (Partnerships 5-7)

- On #6, provide ongoing and consistent data reporting so Councilors can track progress over time.

Partnerships – Pathways (Cammy Peterson)

8. *Expand approach to partnerships to include entities other than municipalities*
 - *Community-based organizations (see next section of recommendations)*
 - *Statewide and regional organizations representing underserved communities and populations*
 - *Consider expansions beyond populations that the Equity Working Group has been focusing on*
9. *Create goal-setting and evaluation mechanisms that include partners*
10. *Ensure partnerships go beyond just outreach*
 - *E.g., partners could serve as savings aggregators, project openers or closers, implementers*

Clarifying Questions (Councilor questions. EWG member responses indented).

- On #10: Speaking as a former implementer in 26 states, having partners be implementers can be problematic – it can create confusion in the absence of strong coordination. I would recommend that partners facilitate not compete with implementers.
 - *PA response:* What we heard from stakeholders is that they want to have input on the process, not necessarily implement themselves.
 - Response: Considering barriers to certain customers making it through the process, and recognizing that community partners are the trusted organization, the idea is for partners to do more than just outreach and marketing – they can actively help customer participate. So, while I don't think the partners would necessarily install measures, they would implement in the sense of closing projects and streamline participation.
 - *PA response:* To Steve's point, we need to be cautious about developing a parallel path that could create competition and confuse customers in the process
 - Response: Remember that the broader goal is to create a new paradigm; do not get stuck in historical approaches and mindsets.
- On #8, could we expand a cultural approach with the LGBTQ community?
 - We were thinking broadly. We spoke to neighborhood groups, community development corporations, and other groups. Cultural groups could certainly be considered if they made sense for a given community.
- Earlier pilots in Chinatown and Chelsea, having a local presence provides real value.
- During an EWG meeting, we invited a deaf individual to provide input and we were incapable of receiving that input in that person's language. This is an example of a distinct population where we need to learn how to serve them.
- An example of a partnership between CDC and City of Boston: in Dorchester many homes were successfully weatherized.

Councilor Comments/Suggested Improvements (Partnerships 8-10)

- #10: Modify language to clarify that intent is for partners is to “facilitate/hand-hold participation” (not implement)
- On #8, consider adding LGBTQ community
- #8, consider adding deaf and hard of hearing community

Partnerships – Investment (Cammy Peterson)

- 11. Identify and connect with local groups that work within underserved communities***
- 12. Listen to community-identified needs***
- 13. Include community leaders in goal-setting and program planning***

- 14. Identify and work with community leaders, with compensation for their time, experience, and knowledge**
- 15. Provide sufficient resources on a sustained, predictable basis to achieve mutual energy efficiency objectives**
- 16. Create regular mechanisms for two-way communication**

Clarifying Questions (Councilor questions. EWG member responses indented).

- #14: Is there thought on what metrics we'd use to evaluate this type of partnership compared to status quo – in order to ensure that ratepayer funds justify compensating community leaders?
 - Response: We don't have metrics yet but know that we've been underserving communities and can't expect community leaders to volunteer but need to recognize that they bring real value and compensate commensurate for their time and expertise just as we would for a vendor. We certainly hope that expanding partnerships will help us reach our goals.
 - *Consultant response:* We didn't see this as a replacement for other forms of payment, but in addition to existing models. PAs will still need to meet cost-effectiveness targets.
 - Response: Community groups have unique expertise; if working with a particular local group doesn't provide payoffs, then move on to a different group.
- On #16, what did you have in mind?
 - Response: The intent is highlighting the need for more than a PA-driven program, but allow for community partners to be more engaged.
 - *Consultant response (Elizabeth):* Our goal was to be less prescriptive and more high-level.
- How do we train local groups and experts to work within the efficiency framework?
 - Response: That's the intent of an intersectional approach.
- Equity in energy efficiency is a problem we've not been able to solve, so we'll need to do things that we are uncomfortable with such as compensating local groups – we need to be comfortable failing; we are discussing equity and injustice and a failure of our programs to serve these communities.
 - *PA response:* A good example of compensating partners was a civic leader who attended one of the EWG stakeholder meetings, and they're directly connected to landlords who own smaller units, which is a population we're struggling to connect with. A crucial element to success is a place-based approach to overcome barriers and reach customers – thus it's crucial to compensate them for their time and expertise just as we would with any vendor.

Councilor Comments/Suggested Improvements (Partnerships 11-16)

- On #14, consider adding specific metrics that allow comparison of compensating community leaders to the current approach.

- Better define types of “community groups” intended, with focus on appropriate groups to ensure implementation is effective.

Partnerships – Priorities (Cammy Peterson)

17. Use quantitative information where available to determine geographic areas and population groups that should be targeted with partnerships

- ***History of underservice***
- ***Income / energy burden***
- ***Language***
- ***Race or ethnicity***
- ***Environmental burdens***

Clarifying Questions (Councilor questions. EWG member responses indented).

There were no clarifying questions for this group of recommendations.

Councilor Comments/Suggested Improvements (Partnerships 17)

- Add COVID impacts to list of factors to consider which communities to target.
- Add “ongoing” reporting so Councilors can track progress.

CROSS-CUTTING RECOMMENDATIONS – REPORTING, TARGETING AND REWARDING PERFORMANCE

Cross-Cutting – Reporting, slide 1 (Jo Ann)

- 1. More frequent reporting of participation by underserved customer groups***
- 2. More detailed reporting on services to underserved customer groups***
- 3. Increase transparency for small business participation***
 - ***Separate small business from C&I existing building retrofit***
 - ***Expand reporting on small business participation***

There were no clarifying questions, comments, or suggested improvements for this group of recommendations.

Cross-Cutting – Reporting, slide 2 (Jo Ann)

- 4. Establish written language access policy, preferably in common across all PAs and vendors, and provide regular training on language access***
- 5. Gather and track customer language preference***
- 6. Track and report language by program participant***
- 7. Maintain catalog of language capabilities of workforce, including PA staff and vendors***

8. *Create mechanisms for easy and equitable sharing of language support*
 - *MOU across PAs, lead vendors, subcontractors*
 - *Regularly updated template for PA and vendor access language support*

There were no clarifying questions, comments, or suggested improvements for this group of recommendations.

Cross-Cutting – Targeting and Rewarding Performance (Jo Ann)

9. *Designate PA budget and savings goals for rental properties, with targets for small buildings*
10. *Establish goals for increased participation by underserved customer groups*
11. *Build equity goals and metrics into small business turnkey vendor contracts at time of renewals*
 - *Serving EJ communities*
 - *Supplier diversity goals for prime contractors*
12. *Craft performance incentive mechanism that DPU can approve and that will emphasize equity and underserved customer groups*

Clarifying Questions (Councilor questions. EWG member responses indented).

- For context, the EWG focused initially on key programmatic recommendations in preparation for the April draft. Our expectation is that the EWG will dive deeper on performance recommendations in the coming weeks.
- I support #9, but assume we need to dig into how to identify which is a rental property and what qualifies as “small buildings.”
- PA Comment: As a word of caution, we shouldn’t become so prescriptive on budgets and goals that we can’t be responsive to other equity issues.

Councilor Comments/Suggested Improvements

There were no suggested improvements for this group of recommendations.

OTHER ADDITIONAL RECOMMENDATIONS

Ideas for New recommendations

There were no additional suggestions for recommendations.

WRAP UP, FEEDBACK & NEXT STEPS

Jonathan Raab thanked participants for their engagement and attention. He noted that there have been about 20 recommendations in each of the previous five workshops, and another 80 or so today, for a total of about 150 recommendations. At the next workshop on January 20th, the goal will be to finalize the recommendations before they go more formally to the EEAC at the

February meeting. The facilitation team has developed meeting summaries for each of the workshops, and the consultant team has revised many of the recommendations in a redline document that provides transparency into changes. Meeting summaries 1-4 plus the redline and clean recommendations documents will be posted for review at workshop 6. Redline changes for this workshop may be delayed by a need for EWG review for recommendations requiring more substantial changes.

Consultants and DOER are flagging 1-2 recommendation for each sub-section of the workshops where there were either many changes or otherwise a need for the Council to reflect on those recommendations. In addition to the flagged recommendations, there will be an opportunity for Councilors to discuss and review all other recommendations.

Maggie McCarey will work with the EWG to determine the appropriate next steps for reviewing and finalizing the recommendations from today's workshop. She will confirm the process when the agenda for workshop 6 is posted.

Jonathan requested that Councilors review the meeting summaries so that we can efficiently review and approve them at the beginning of workshop 6 and focus the bulk of the workshop on finalizing recommendations from prior workshops.

In closing, Maggie thanked everyone for their engagement, Alexis Washburn for her leadership on the EWG, the Councilors that participated in the EWG, and the external stakeholders for participating and providing new voices in the discussion. She noted that the work far from over, but that the process and group is strong.

APPENDIX: Meeting Attendees (not including the public attendees)

January 12, 2021 Attendance -EEAC Workshop #5²		
Voting Councilors		
Greg	Abbe	DHCD
*Cindy	Arcate	Non-Profit Network
*Jo Ann	Bodemer	AGO
Amy	Boyd	Acadia Center
Justin	Davidson	MA Association of Realtors
*Charlie	Harak	NCLC
Elliott	Jacobson	Action Inc.
Paul	Johnson	Greentek
*Maggie	McCarey	DOER
*Cammy	Peterson	MAPC
Bob	Rio	Associated Industries of MA
Sharon	Weber	DEP
Dennis	Villanueva	Partners MGH
*Mary	Wambui	Planning Office for Urban Affairs
Patrick	Woodcock	DOER
PAs – Non-Voting Councilors		
Tim	Costa	ISO-NE
Steve	Cowell	Councilor Designee-E4theFuture
Cindy	Carroll	Unitil
*Maggie	Downey	Cape Light Compact
Mike	Ferrante	MEMA
*Amanda	Formica	National Grid
*Stephanie	Terach	Liberty Utilities
Other Presenters		
*Ruth	Georges	Eversource
*Caitlin	Peale Sloane	CLF
*Alexis	Washburn	DOER
Other Equity Working Group Members		
*Brian	Beote	Action Inc.
*James	Collins	ABCD
*Eugenia	Gibbons	GJC
*Cindy	Luppi	Clean Water Action/GJC
*Elizabeth	Chant	EEAC Consultant Team
*Margie	Lynch	EEAC Consultant Team

² Note: * denotes EWG members