



FINAL Meeting Summary

December 15, 2020
Virtual Meeting via Zoom

Participants: Over 140 people attended the workshop including 20 Councilors. A list of Councilors in attendance and Presenters (EEAC Consultants and Program Administrators) is included in the Appendix. The workshop background material and presentations can be found at <https://ma-eeac.org/workshop-4-workforce-development-and-residential-existing-buildings/>.

WORKSHOP OVERVIEW

Maggie McCarey, DOER Energy Efficiency Division Director and EEAC Chair, welcomed participants. Maggie explained that there will not be time for public comment at this workshop, as there are six dedicated public listening sessions. Additionally, the EEAC expects to schedule more public listening sessions in 2021. The protocol is for all public comments to be posted to the EEAC website. The goal of the workshop series is to develop a set of consensus Councilor recommendations for PAs to address in the development of their next 3-year plan. She then conducted roll call.

Dr. Scott McCreary, facilitator at CONCUR, Inc., provided an overview of the ground rules and the approach to making recommendations, which can be found on the meeting materials for the first workshop ([“MA EEAC 2020 Workshop Protocols and Groundrules”](#)).

APPROACH TO RECOMMENDATION FRAMING AND DISCUSSION

The approach to recommendation framing and discussion for the Workforce Development and Residential Existing Buildings recommendations differed from the previous workshops.

First, Councilors and Co-chairs of the EEAC Equity Working Group (EWG) Cammy Peterson and Mary Wambui presented the EWG Workforce Development recommendations as a package. Next, facilitator Scott guided Councilors through each recommendation, one at a time, displaying the EWG slides (linked above) for reference. He organized the conversation around each recommendation by breaking the discussion into two categories: clarifying questions from the Councilors followed by their suggested improvements.

Then, EEAC Consultant Adam Jacobs presented the Consultant Team Workforce Development recommendations as a package. Facilitator Scott guided Councilors through each recommendation, one at a time, displaying the Consultant Team slides (linked above) for reference. He organized the conversation around each recommendation by breaking the discussion into two categories: clarifying questions from the Councilors followed by their suggested improvements.

Next, EEAC Consultant Margie Lynch presented a brief overview of factors considered for Residential Existing Buildings. Then, EEAC Consultant Glenn Reed presented recommendations for Heat Pumps and Electrification. This was followed by facilitator Scott organizing the conversation around each recommendation by breaking the discussion into two categories: clarifying questions from the Councilors followed by their suggested improvements.

Afterwards, EEAC Consultant Glenn Reed then presented background information for the Fossil Fuel Heating Incentives recommendations. Facilitator Scott organized the conversation around each recommendation by breaking the discussion into two categories: clarifying questions from the Councilors followed by their suggested improvements.

Then, DOER Ian Finlayson gave a presentation about DOER's HomeMVP Program, followed by presenting the first Residential Coordinated Delivery (RCD) recommendation. This was followed by facilitator Scott organizing the conversation around each recommendation by breaking the discussion into two categories: clarifying questions from the Councilors followed by their suggested improvements.

Finally, EEAC Consultant Caroline Hazard presented the second RCD recommendation. This was followed by facilitator Scott organizing the conversation around each recommendation by breaking the discussion into two categories: clarifying questions from the Councilors followed by their suggested improvements.

After discussing the Workforce Development and Residential Existing Buildings recommendations, facilitator Scott elicited ideas for potential additional recommendations beyond those listed in the briefing documents.

WORKFORCE DEVELOPMENT

Prior to the Workforce Development recommendations, Maggie presented slides about the process of how the EWG Equity developed the EWG Workforce Development recommendations. Specifically, she referenced the EWG members involved in the process and the EWG Workforce Development Stakeholder Feedback Process.

INCREASE TRACKING AND REPORTING

1. Establish goals and benchmarks to increase diversity of workforce in 2022-2024.

Clarifying Questions (Councilor questions. PA and EWG Co-chair responses in italics).

- To establish an achievable and appropriately ambitious target, don't you need historical information, and does that exist?
 - EWG Co-chair response: I'll quickly say that I think there is some information; a good deal more is needed to establish those benchmarks so that we can understand what the starting point is and make those comparisons to confirm if and when we are making progress.*
 - PA response: A PA highlighted examples of having worked on the energy efficiency workforce assessment as well as the Massachusetts Clean Energy Center (Mass CEC) data as ways to create achievable targets.*

Councilor Comments/Suggested Improvements

None

2. Track and regularly report key indicators of workforce diversity.

Clarifying Questions (Councilor questions. PA and EWG Co-Chair responses in italics).

- What are the key indicators and in what document can I find them?
 - EWG Co-chair response: As listed in the recommendations document on the EEAC website ("EEAC Equity Working Group Summary to EEAC on Workforce Development recommendations"), we had listed disadvantaged businesses enterprises, vendor participation, the number of women, and BIPOCs (Black, Indigenous, and People of Color) employed by PAs and other firms providing services to Mass Save.*
- I saw that you had listed in your goals, increasing diversity, one item was language diversity. But, on the tracking, I don't think I quite followed whether you were going to be tracking language diversity? Is that something that needs to be added or is that implied?
 - EWG Co-chair response: We will address other aspects of diversity, including topics such as limited English proficiency in the next workshop.*
- I want to clarify what the Councilor was asking. Do we want to consider establishing goals and benchmarks to increase diversity? Diversity in what way? Diversity does include multi-language workforce.
 - EWG Co-chair response: Anytime you are talking about increasing diversity in the workforce, it's obvious that we will be tracking language. Those considerations like language are just basic indicators of diversity.*
- Right, I just wanted to clarify. Councilor, have we addressed your concern?
- Well, I think what I am hearing is I might have my concern addressed in January.
- I agree. I think that will partially be covered in January, but maybe making it more explicit here to address the EWG Co-chair's point would be good.
- I think what the EWG Co-chair said around the indicators would be important to include in the final set of recommendations. I wanted to suggest including those indicators around MBEs, WBEs, and tracking BIPOC members of the workforce.

Councilor Comments/Suggested Improvements

- Include language as a measure of diversity
- Include indicators around Minority Business Enterprises (MBEs), Women Business Enterprise (WBEs), and tracking (Black, Indigenous and People of color) BIPOC members of the workforce

INCREASE THE DIVERSITY OF THE WORKFORCE SUPPORTING MASS SAVE

3. Assess and revise vendor solicitation processes

- **Include certified MBEs and WBEs in all RFP, RFQ, and RFI distribution lists.**
- **Require bidders to make measurable financial commitments to do business with one or more diverse businesses on all procurement opportunities with a value greater than \$150,000.**

Clarifying Questions (Councilor questions. PA and EWG Co-chair responses in italics).

None

Councilor Comments/Suggested Improvements

None

4. Identify and remove barriers to increase Disadvantaged Business Enterprise (DBE) participation

Clarifying Questions (Councilor questions. PA and EWG Co-chair responses in italics).

- Is there a good definition of disadvantaged business enterprises? Also, have we reached out to other Massachusetts departments to gain their input?
 - a. *EWG Co-chair response: For your first question, we mean minority enterprises. I don't think we need to define that. To your second question, we are focusing on what specifically happens at Mass Save that structurally contributes to barriers for minorities.*
- I would agree that diversity in this context is a well-known term of art. But, if more definition were needed, then that would be easy enough to fill in.
 - a. *EWG Co-chair response: Unfortunately, I would have to disagree with my co-chair. I disagree with the idea of including detailed definitions on disadvantaged business enterprises.*
- One note in the briefing document, we did include a glossary of terms.
- Am I correct on understanding that disadvantaged business enterprises do not include disability, veterans, and lesbian/gay/bisexual/transsexual business enterprises?
 - a. *EWG Co-chair response: They do include those enterprises.*
- There are some places in the briefing document where disadvantaged business enterprises are discussed, specifically discussing minorities and women, but does not address any of those three categories. So maybe the answer is, where the text mentions minorities and women, it should also add the other categories.

Councilor Comments/Suggested Improvements

- Make explicit that we are addressing “financial barriers”
- Include in the definition disabled, veterans, and lesbian/gay/bisexual/transsexual business enterprises

5. Set minimum standards for formal diversity, equity, and inclusion policies for all Mass Save contracted vendors

Clarifying Questions (Councilor questions. PA and EWG Co-chair responses in italics).

- In the briefing document, there is a little more detail under Segment Owned Standards and it says, ‘provide detailed technical assistance to vendors.’ Do the authors want to elaborate so we don’t inadvertently create barriers by imposing requirements on small contractors that might be more diverse than the big, established contractors?
- The working group did raise the issue as to whether standards would differ depending on size of the company. Maybe that is something that the working group can take up. But, I think that level of tactical detail is more detailed than we were planning to include in the recommendation here.
- How do the PAs staff workforce development efforts? How do we make sure that the PAs deliver on all of their responsibilities? There seems to be a lot to cover, and the PA staff who focus on workforce all have other responsibilities unrelated to workforce.

Councilor Comments/Suggested Improvements

- Add a separate recommendation requiring PAs to devote sufficient levels of staffing and effort to manage workforce development with dedicated workforce-focused staff

6. Create a detailed list of all training opportunities available through or supported by Mass Save and make that list easily available to stakeholders and on the Mass Save website.

Clarifying Questions (Councilor questions. PA and EWG Co-chair responses in italics).

- Training goes beyond what is available in Massachusetts or through Mass Save. One example is the Building Performance Association, where I serve on the board. There are lots of training opportunities there and it would be a good idea to add broader, national efforts around training to your list.
 - EWG Co-chair response: A yes for me.*
 - EWG Co-chair response: The Councilor makes a good point about there being a plethora of training opportunities. This recommendation is meant to really address what we heard from stakeholders about programs listed in different areas even just within Mass Save. It is challenging to know where to find available programs. So, centralizing information about training opportunities would be helpful.*

Councilor Comments/Suggested Improvements

- Add broader, national efforts around training to the list
- Broaden training opportunities beyond Mass Save
- Create a more centralized location that is easily accessible for people to go to for training opportunities

7. Create targeted support for workforce and contractor development efforts in Environmental Justice communities with historically low participation in Mass Save.

Clarifying Questions (Councilor questions. PA and EWG Co-chair responses in italics).

None

Councilor Comments/Suggested Improvements

None

ATTRACT AND TRAIN YOUNG AND DIVERSE PERSONS FOR PARTICIPATION IN THE ENERGY EFFICIENCY WORKFORCE

8. Expand outreach & education about career opportunities to include stronger partnerships with vocational and technical high schools and community colleges.

Clarifying Questions (Councilor questions. PA and EWG Co-chair responses in italics).

- The Department of Labor Standards has resources for those additional internships, apprenticeships, and training. It would be a good idea for the team to join the effort and obtain those standards.
- I'm not sure whether additional detail of that sort belongs in this recommendation. This suggestion does seem a little outside Mass Save, but I think it's something that we should bear in mind as we think about how we use Mass Save to leverage and go beyond the program boundaries to other areas.

Councilor Comments/Suggested Improvements

- None

9. Fund internships, apprenticeships, pre-apprenticeships, and externships.

Clarifying Questions (Councilor questions. PA and EWG Co-chair responses in italics).

- *PA response: I think that you'll see as we move forward with the clean energy pathways internship program, that a lot of these recommendations are being incorporated into the structure for that.*
- Thank you for your response because I was going ask whether someone wanted to chime in from the PAs, particularly on the internship program that they are working on launching. I think it is very aligned with some of the recommendations from the working group.

Councilor Comments/Suggested Improvements

None

CONSULTANT TEAM WORKFORCE DEVELOPMENT RECOMMENDATIONS

Prior to delivering the recommendations, EEAC Consultant Adam Jacobs presented a slide with historical data on workforce development spending for Mass Save.

10. Deliver targeted training for emerging and/or critical technologies including building automation systems and heat pumps.

Clarifying Questions (Councilor questions. PA and Consultant responses in italics).

None

Councilor Comments/Suggested Improvements

None

11. Complete an independent Mass Save workforce study with a first report to be completed by September 2022.

Clarifying Questions (Councilor questions. PA and Consultant responses in italics).

None

Councilor Comments/Suggested Improvements

None

12. Expand investments in workforce development including but be not limited to funding apprenticeships and internships, training and upskilling for incumbent workers, and outreach to draw new and diverse workers into the Mass Save ecosystem. Target an increase in workforce development spending to 2% of total annual budget by the end of 2022-2024 plan period.

Clarifying Questions (Councilor questions. PA and Consultant responses in italics).

- We are under spending in workforce development. Two percent is a benchmark. Did you use a bottom up approach in deriving the particular spending targets for goals, such as training? Once you have arrived at the percentage, have you thought about evaluating what the dollar amount from the percentage could be used and build the budget from there? Lastly, do you also have thoughts of recommendations for PAs staffing to address the workforce development.
 - a. *Consultant response: I agree with you about the value of the bottom up approach to building the budget from there. To your point about on the staffing at the PAs, I do know that we have great members at the EWG who spend a lot of time on workforce issues. I don't know the exact percentage or breakdown of spending allocated for workforce development.*
- I agree with a recommendation to increase spending on workforce development. I think one approach here is to indicate that the Council is supportive of this level of increase as recommendation with a clearer statement of the derivation of figure to be developed by PAs as part of their draft plan in April.
- Why are we spending twice as much on residential education for students as we are on workforce development?

- a. *PA response: As part of our education process, we really want to be inculcating a lot of knowledge about energy and energy efficiency early so that students are aware of workforce opportunities. There is a higher amount related to workforce development that is not reflected there.*
- Where do we find that information?
 - a. *PA response: We've taken steps in the workforce development RFP and these recommendations we are talking about today with a focus on how to make some improvements in workforce development.*
 - b. *PA response: My preference would not be to include an explicit 2% target as part of the recommendation. Rather, building from a bottom-up approach would be better given the robust Massachusetts energy efficiency budget.*
 - c. *Consultant response: There are opportunities to increase savings by focusing on the workforce and ensuring that projects deliver on the estimates that we provide to customers.*
- What would be a reasonable way to express a target? I would actually like a percentage from the PAs. How great are we going to be at developing this bottom up approach? I am supportive of having a target spending percentage. I am concerned that new contractors and vendors may not get support for capital access, reporting, and compliance help if there is not specified funding.
- I support these three recommendations and setting a target budget. We can incrementally increase the budget annually over time to achieve 2% by the end of the 2022-2024 plan cycle.
- I have a similar comment to what has been stated. I have a continued interest in any goal with tracking. I feel like we need real-time reporting.
- The DPU has put out its new 2150 rule. Can we get the workforce expenditures approved by the DPU in terms of what is the benefit of a benefit-cost analysis? Is there anything we need to do to make sure that our efforts get to the DPU and approved?
- Right now, the cost-effectiveness requirement, at least in statute, is at the sector level and is under the terms of DPU's order in the current plan. We need to review the April draft to assess the current budget and build up from there. This will help us determine the cost-effectiveness of the program as a whole.
- At the low income best practices meeting last week, it was brought up that a lot of contractors are finding it difficult to recruit and maintain sufficient qualified employees given other available options in the labor market.
- The statement about labor market competition has been used as an excuse to avoid diversifying the work force. That dynamic is a barrier. Part of this budget is for going that extra mile to recruit and retain people of color.
 - a. *PA response: The clean energy pathways program targets underserved communities that have been historically under-represented in the energy workforce.*
- The Councilor asked how can we attract and maintain the workforce when there's more lucrative work opportunities out there? We have got to pay people more.

Councilor Comments/Suggested Improvements

- Include a specific target spending amount for workforce development as well as the derivation of that figure
- Set a target spending amount for workforce development
- Incorporate real-time tracking and reporting of workforce development expenditures

RESIDENTIAL EXISTING BUILDINGS

EEAC Consultant Margie Lynch provided an overview of factors for the Residential Existing Buildings. Afterwards, EEAC Consultant Glenn Reed provided some background information and presented the Heat Pump and Electrification recommendations.

HEAT PUMPS AND ELECTRIFICATION

13. Establish separate, higher heat pump unit goals to reflect EEAC priorities. Goals should be broken out by all heat pumps, whole house conversions, partial displacement, and heat pump water heaters.

Clarifying Questions (Councilor questions. PA and Consultant responses in italics).

- How many total heat pump and heat pump water heaters were installed outside of the program?
 - a. Consultant response: We don't have that information readily available. The small sample size for new installs in the Baseline Study may make it difficult to derive the information from that source. We will check that Study and other sources and get back to you on that.*
- I would like to make sure that tracking goals are included in this recommendation along with this goal.
- Does this recommendation intend to ultimately disconnect the old house equipment, like an oil blower or gas blower, such as a whole house conversion to rely on these heat pumps?
 - a. Consultant response: Yes, for whole home conversions, but the implementation would depend on the home, it may require some amount of resistance backup. The presumption is that the existing fossil fuel heating pump be removed.*
- The issue with whole home conversion is that it is more about the percentage of the load to be displaced with heat pumps rather than removing the existing fossil fuel heating back-up systems.
- I would like more information about the issue to make sure that the heat pumps are being used as intended.
 - a. Consultant response: PAs have been working with industry to develop integrated controls to ensure proper control of the heat pump and the existing fossil fuel heating system.*
- Is there a consideration to ensure that there is a back up system? We don't want a situation where the heat pump fails, the customer doesn't want to repair it and there is no back up system.

- a. *Consultant response: Point taken.*
- b. *PA response: Education is important to the customer about this new technology. We are doing this in the field already.*
- It is possible to assemble heat pumps in an inefficient way. However, it is also possible to assemble gas and oil furnaces inefficiently. The same criticism could be raised for any of the other technologies we are putting in the field. The fact that these technologies are new should not scare us. We should be setting higher targets. They are in our programs. We should implement heat pumps carefully and well.

Councilor Comments/Suggested Improvements

- Include tracking as part of the goal
- Support this measure without a requirement that participants have a back up system

14. Bolster program support and market promotion of heat pump technologies for primary heating including the addition of incentives and HEAT Loan eligibility for ground-source heat pumps by January 2022:

- a. **Enhance HVAC contractor technical competencies for heat pump system selection, design, installation and maintenance**
- b. **Co-deliver with other energy efficiency and active demand management measures**

Clarifying Questions (Councilor questions. PA and Consultant responses in italics).

- There needs to be an education of consumers before their system fails. Customers need to have a basic level of understanding of heat pumps and what they can do.
- What is known about free ridership in terms of ground source heat pumps?
 - a. *Consultant response: I am not aware of Massachusetts research regarding ground source heat pumps. For free ridership, I would have to refer to neighboring states about this issue.*
- My primary concern is the high expense of these systems. Why are we providing incentives to people who are spending \$50/60,000 on a ground source heat pump, when they could probably afford the expenditure easily on their own? I don't see a need to incentivize ground source heat pumps.
- The fixed incentive might be an obstacle to spread the technology. Weatherization should be required in order to get this incentive. Employing the systems more widely is the more important aim than addressing the issue of free ridership.

Councilor Comments/Suggested Improvements

- Include either a stand-alone recommendation about educating customers about heat pumps or embed education within this recommendation

FOSSIL FUEL HEATING INCENTIVES

EEAC Consultant Glenn Reed first presented background information for the Fossil Fuel Heating Incentives recommendations.

Clarifying Questions (Councilor questions. PA and Consultant responses in italics. Note some questions relate to the Consultant presentation rather than the draft recommendations).

- Can you spell out your thinking as to how addressing low-income/moderate income needs ‘may be different’ as stated written in the briefing document, though not included on the slides here?
 - a. *Consultant response: We want to recognize that there have not been discussions with low-income stakeholders on some of the very specific details on how to best address this market. In the case of low-income customers, there is still a significant cost premium even if the prior heating system was condensing. Whether there is an obligation on the part of the program to help cover some of that cost has not been a topic of discussion.*
- I would want to see support so that they don’t have higher heating bills.
- A reminder: at this point these are clarifying questions on the presentation. We have not gotten to the recommendation slides.
- Do we know how many people are using HEAT Loans to cover a condensing gas boiler or furnace?
 - a. *Consultant response: We do not have that data as part of the briefing document.*
- Could the PAs weigh in if that data is accessible?
 - a. *PA response: Because of the efficiency levels for gas systems, everything we would be incentivizing would be for condensing boilers or furnaces. We do not have the data. There is some data on MSD on HEAT Loan volumes, but I am unsure about the level of granularity on number of customers.*
- But we wouldn’t have the data broken out by customers that are accessing HEAT loans that currently have a condensing system versus currently not having one?
 - a. *PA response: That is correct.*

15. Limit fossil fuel space heating incentives only to technologies and installations where clear cost-effective savings remain.

- a. **Incentivize only non-condensing to condensing fossil fuel systems by January 2022, using a phased approach if necessary to support an orderly market transition.**
- b. **Cease support for oil-fired heating equipment as of January 2022; handle as custom measure, especially for multifamily buildings.**

Clarifying Questions (Councilor questions. PA and Consultant responses in italics).

- I support phasing out gas and oil equipment. I would also increase incentives for heat pumps, ground source, or air source. I would like more clarification of what the impact is on the results in shifting from non-condensing equipment to condensing equipment.
- I support this recommendation.
- I am not inclined to support this recommendation without being very sure about what happens to people who do not fit this mold.
- This recommendation doesn’t address what happens with low-income families when their system fails. I don’t want them to be stuck with high bills.
- I have concerns of back sliding without an incentive or a HEAT Loan.

- Is it possible to get rid of the incentives and keep the HEAT Loan?
- I agree to what has been said here. We need to be progressing towards electrification while also ensuring that we have created policies that allow low-income and moderate-income families to have access to space heating and water heating. It's a good time to be moving towards heat pumps.
- I support this recommendation. I would like to see secondary heat pumps.
- The way I view this recommendation is that it's not a prudent use of funding to incentivize a customer who already has a high efficiency system to get another high efficiency system. This wouldn't get rid of incentives for high efficiency systems for customers who now have low efficiency systems. Is that correct?
 - a. *Consultant response: Correct.*
- On the point of low-income customers, this recommendation is specifically aimed at residential market rate programs, correct?
 - a. *Consultant response: The argument still potentially holds that back sliding is not likely to happen. There's still a significant cost to the homeowner or landlord. Is there some responsibility of the program to help address that cost? The recommendation does not include that level of detail.*
- I recommend that Consultants work on the language of this recommendation to be more aligned with what one of the Councilor's said.
- I agree with this recommendation.
- Is there data to back up the prospect that low-income residents' bills will go up?
- More data is needed to support this recommendation.

Councilor Comments/Suggested Improvements

- Amend the recommendation to be more explicit on who is eligible to get incentives and the amount the of the incentive
- Research whether there will be unintended costs from transitioning residential heat sources
- Include data to confirm whether low-income residents' bill could go up when transitioning to electric
- Include data to address what happens with renters' bills
- Include the text from Slide 32 from the Consultant's presentation on Cease Support for Oil-Fired Heating Equipment (Incentives and Heat Loans), such as: "low/moderate income program needs should be studied further before implementing this recommendation"

16. Phase out fossil fuel water heating incentives.

- Cease incentives and HEAT Loans for oil and propane water heating equipment by January 2023, using a phased approach if necessary to support an orderly market transition.**
- Cease incentives and HEAT Loans for storage and indirect natural gas water heaters as of January 2022, but retain for more efficient tankless and condensing gas systems.**

Clarifying Questions (Councilor questions. PA and Consultant responses in italics).

- For part A, why is the target date of implementation 2023 and not 2022? And why is there a need for a market transition approach?
 - a. *Consultant response: The term “market transition” is used generically. We hope to work with the PAs and their trade allies to ensure that this is implemented in a way that is orderly and does not leave customers or contactors uninformed. The date 2023 is not set in stone, but we thought this particular market might take a little longer to fully transition.*
- I think these are reasonable steps to be taking towards our climate planning efforts. I support this recommendation.
- My comment will be the same. It’s good to phase out these incentives as long as we are making sure we are bringing up those people that we have forgotten for 10 years.
- My opinion is consistent with what the others said earlier.
- I support this recommendation. We want market transformation for everyone involved.
- What would it cost to make that shift, particularly for low-income/moderate income individuals? What is the delta in the cost of the current range of systems? Was that presented in the workshop briefing document?
 - a. *Consultant response: Yes, we have done some analysis, in particular with cost effectiveness of the heat pump water heater and other permutations.*
- I think it would be good to have a memo about the range of costs likely to be incurred.
- I agree with this recommendation. How can we address that cost to the landlord to deal with the split incentive issues, so that the renter benefits from the low cost?

Councilor Comments/Suggested Improvements

- Amend recommendation to consider the unintended costs to underserved communities of transitioning heat sources

RESIDENTIAL COORDINATED DELIVERY (RCD)

Ian Finlayson of DOER gave a presentation about DOER’s HomeMVP Program, followed by presenting the first Residential Coordinated Delivery (RCD) recommendation. Finally, EEAC Consultant Caroline Hazard presented the second RCD recommendation.

17. Supplement current RCD program with new, custom performance-based offer modeled after DOER’s Home MVP pilot.

Clarifying Questions (Councilor questions. PA and DOER responses in italics).

- How many weatherization jobs were there? What percentage of HVAC contractors did weatherization? What incentive is there for an HVAC contractor to promote insulation?
 - a. *DOER response: Although I do not know exactly how many contractors incorporated weatherization, it is likely a majority. We could get you that number. At the moment, most HVAC contractors do not want to add weatherization services. But, the idea of a custom program, by design, is that it encourages a co-delivery of weatherization and heat pumps. They are incentivized to maximize their total energy reduction.*

- I am in favor of this recommendation because it reduces barriers to customers.
- I like this idea too. I echo what the Councilor said about reducing barriers for customers to adopt weatherization and heat pumps.
- I would like to see here that the customer is incentivized to do both installation of heat pumps and weatherization, but still lets this program continue.

Councilor Comments/Suggested Improvements

- Include text to incentive the customer to do both weatherization and heat pumps

18. Implement state of art communication and data management practices to increase effectiveness of customer interactions, including but not limited to:

- Review/refresh Mass Save and PA websites**
- Carry through updated messaging strategies to customer emails, social media, and other communication channels**
- Improve the home energy audit report**
- Improve behavior reports**
- Enhance use of technology**

Clarifying Questions (Councilor questions. PA and Consultant responses in italics).

- Although we are moving towards state of the art communication tactics and data management practices, we must consider the fact that not all communication mediums are effective in reaching disadvantaged and minority populations.
 - Consultant response: Agreed. Designing any communication tactics to fit disadvantaged and minority populations needs' must be considered in the communication delivery tactics.*
- I heard from PAs that customers will be able to access a tool online to look at their options. I am unclear if this tool was going to come to fruition in this three-year plan?
 - Consultant response: Yes, PAs have been working on various online tools. The point of this recommendation is to make sure that they are all being refreshed and working more cohesively to support the customer to take action.*
- I cannot support this recommendation without knowing that we are going to have a thorough examination of the residential program. How much time are we going to spend on residential?
- We are spending substantial time on residential. First, we have a January workshop that will have a Residential focus, but it is not going to be on RCD because it will come with other topics from the Equity Working Group. Next, we have started working with the Executive Committee on meeting agendas for the EEAC Meetings for January, February, and March recognizing that we are not getting to topics that are not in this workshop. I think this topic

will be covered in the next EEAC meeting in the first quarter of next year. Let's follow up on this offline.

Councilor Comments/Suggested Improvements

None

OTHER COUNCILOR WORKFORCE DEVELOPMENT AND RESIDENTIAL EXISTING BUILDING RECOMMENDATIONS: DATA GATHERING, RCD HOME AUDIT PROGRAM, SALES TRAINING, POINT OF CONTACT FOR ENGAGING CUSTOMERS, TARGET HIGH GAS USERS AND LIKELY CANDIDATES FOR PRODUCTS, AND SPEND MORE TIME ON C&I

- Include supporting data in all recommendations (i.e. DOER, PAs, and Consultants come to discussions prepared with data to support recommended program changes)
- Include a recommendation to simplify the RCD Home Audit Program.
- Include a recommendation focused on sales training
- Identify a single Point of Contact for engaging customers in the Mass Save program.
- Target high gas users and target the most likely candidates for our products
- Spend more time on C&I

WRAP UP, FEEDBACK & NEXT STEPS

Scott McCreary thanked participants for their engagement and attention and invited feedback and suggested improvements. Hearing none, he reiterated that the next step is for the facilitation team to develop a meeting summary that focuses on suggested improvements to the proposed recommendations, building towards the final workshop geared at finalizing and potentially prioritizing the recommendations.

In closing, Maggie McCarey thanked participants for a robust discussion. The next EEAC Planning Workshop will be held on January 12, 2021, with a focus on Equity in existing buildings.

APPENDIX: Meeting Attendees (not including the public attendees)

| Dec 15, 2020 Attendance – EEAC Workshop #4 | |
|---|-----------------------------------|
| Voting Councilors | |
| Greg Abbe | DHCD |
| Maggie McCarey | DOER |
| Cindy Arcate | Non-Profit Network |
| Jo Ann Bodemer | AGO |
| Amy Boyd | Acadia Center |
| Justin Davidson | MA Association of Realtors |
| Charlie Harak | NCLC |
| Paul Johnson | Greentek |
| Cammy Peterson | MAPC |
| Bob Rio | Associated Industries of MA |
| Dennis Villanueva | Mass General Brigham |
| Mary Wambui | Planning Office for Urban Affairs |
| Sharon Weber | DEP |
| Patrick Woodcock | DOER Commissioner |
| Elliot Jacobson | Action Inc. |
| PA Non-Voting Councilors | |
| Tim Costa | ISO-NE |
| Steve Cowell (for Paul Gromer) | Peregrine Energy |
| Maggie Downey | Cape Light Compact |
| Mike Ferrante | MEMA |
| Frank Gundal | Eversource |
| Stephanie Terach | Liberties Utilities |
| Presenters (Consultants & DOER) | |
| Glenn Reed | EEAC Consultant Team |
| Adams Jacobs | EEAC Consultant Team |
| Ian Finlayson | DOER |
| Caroline Hazard | EEAC Consultant Team |
| Margie Lynch | EEAC Consultant Team |
| PA Respondents | |
| Marie Abdou | National Grid |
| Melanie Cohen | National Grid |
| Amanda Formica | National Grid |
| Ruth Georges | Eversource |
| Stephan Wollenburg | National Grid |