



# EQUITY WORKING GROUP

► **March 25, 2022**

# AGENDA



- ▶ **Welcome**
- ▶ **Review EWG 2022 schedule and topics**
- ▶ **DPU order on three year plan - equity provisions**
- ▶ **Equity targets reporting overview**
- ▶ **Moderate income program updates**
  - Income verification
  - Comprehensive program delivery model for enhanced HVAC equipment incentives
  - Barrier mitigation
- ▶ **Renter Strategic Plan-tactics**

# 2022 MEETING SCHEDULE AND TOPICS

Meeting Date	Meeting Topics
March	<ol style="list-style-type: none"><li>1. Review EWG 2022 schedule</li><li>2. DPU Order on 3 year plan-equity provisions</li><li>3. Equity targets reporting overview</li><li>4. Moderate income program update</li><li>5. Renter strategic plan-tactics</li></ol>
May	<ol style="list-style-type: none"><li>1. Moderate income follow up</li><li>2. Annual reporting</li><li>3. Residential Education Grant</li></ol>
July	Renters/LL's, including providing feedback on Renter Strategic Plan
August	Community Partnerships
October	Small Business
December	<ol style="list-style-type: none"><li>1. Language Access Plan update</li><li>2. Workforce Development</li></ol>

# DPU ORDER EQUITY PROVISIONS

- ▶ **Detailed update provided at February EEAC meeting:**
  - Targeted communities
  - Reporting by municipality (by zip code in Boston)
  - Renter Strategic Plan due 9/30/22
  - Follow up non participant study prior to next plan
- ▶ **Relevant compliance filing due April 1**

*The detailed slides from Feb. EEAC are provided at back of this deck.*

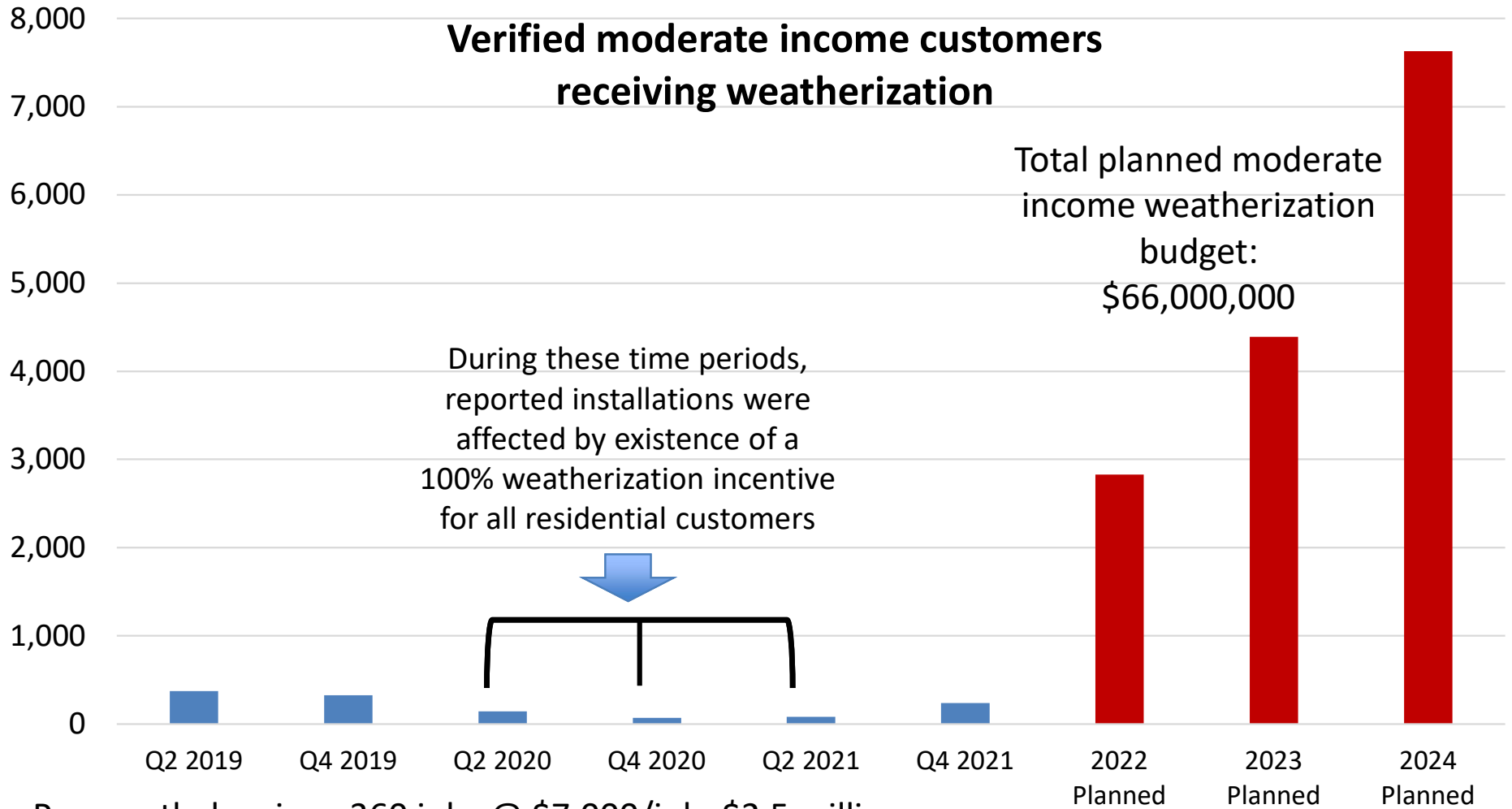
# EQUITY TARGETS REPORTING

Target category	Reporting frequency	1st reporting
Moderate income	Quarterly	May 2022 (weatherization) May 2023 (heating equipment)
Renters and landlords	2x/year	August 2022 (renter unit participation) August 2023 (renter units in attached low rise buildings)
Partnerships	Annually (generally--there are various requirements)	February 2023
Workforce	Annually (generally--there are various requirements)	February 2023
English isolated	2x/year	February 2023
Small business	Annually	February 2023
EJ municipalities	Annually	February 2023

# MODERATE INCOME PROGRAM- BACKGROUND

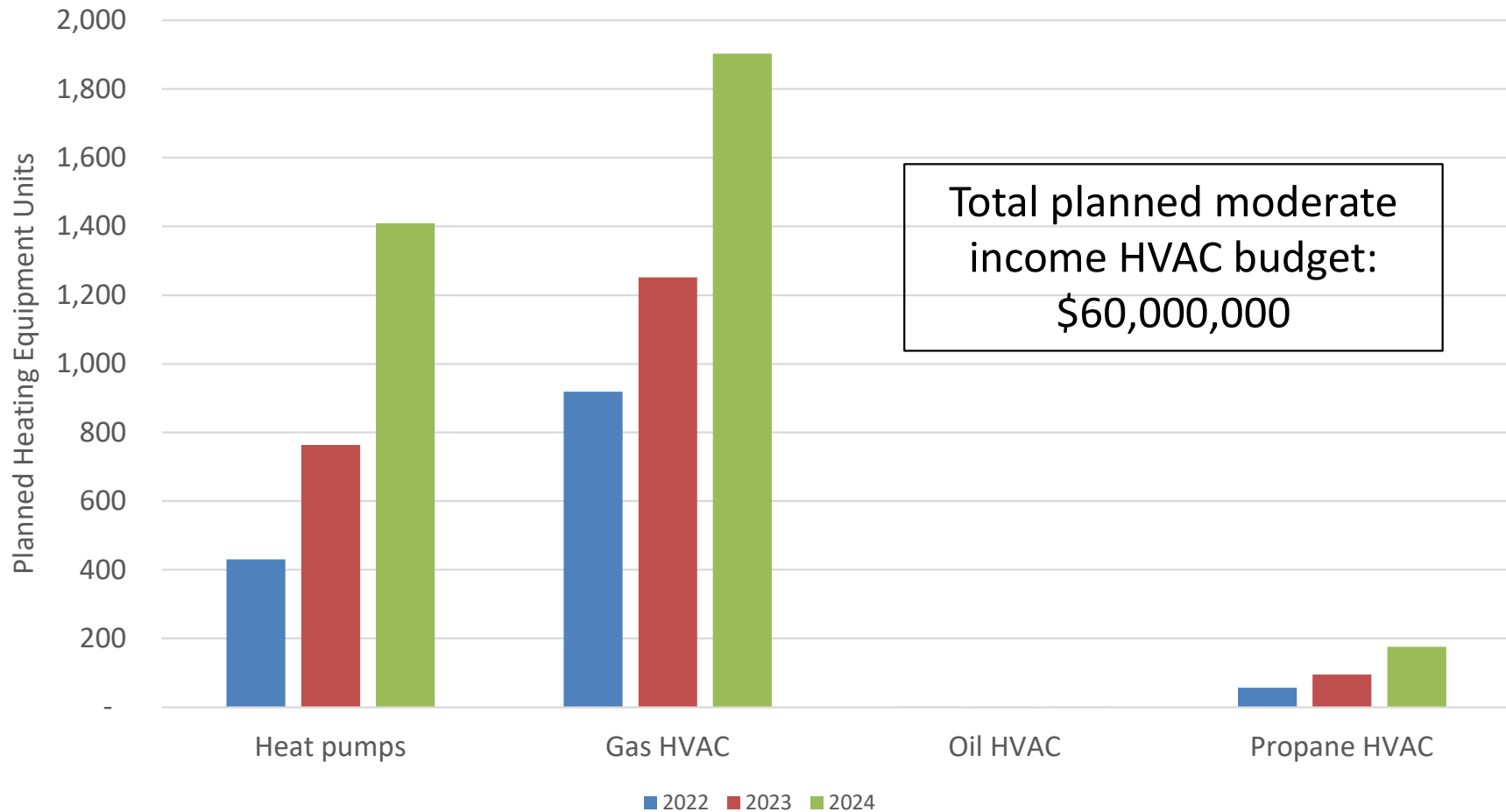
- ▶ **See “Moderate Income Details” tab of Equity Commitments 2022-2024 Excel file for the following information:**
  - Council’s October resolution
  - Information included on program implementation in 3-year plan
  - Additional implementation details provided to DPU
  - Equity targets

# MODERATE INCOME WEATHERIZATION



Pre-weath. barriers: 360 jobs @ \$7,000/job=\$2.5 million

# PLANNED MODERATE INCOME HEATING EQUIPMENT 2022-2024







# **MODERATE INCOME PROGRAM UPDATES**



# **RENTER STRATEGIC PLAN - TACTICS**



# **DPU ORDER CONTENT RELATED TO EQUITY**

# DPU ORDER EQUITY PROVISIONS – TARGETED COMMUNITIES

- ▶ **FILED PLAN: 38 Targeted EJ communities using agreed-upon filters applied to EEA EJ data and PA non-participant study data**
  - At least one census block group meets the income criteria and at least one additional EJ criterion as defined by EEA (e.g., minority or English isolation);
  - Greater than 33% of the population resides in an environmental justice block group;
  - Consumption weighted location participation rate from the Residential Non-Participant Customer Profile Study does not exceed 32%;
  - Median household income is less than 100% of state median household income; and
  - Municipalities not served by PAs for either electric or gas are excluded.
- ▶ **DPU found filed criteria overly limiting and too focused on income. DPU revised the criteria stating that municipalities must:**
  - Be served by electric and or gas PA (same as filed criteria)
  - Contain at least one EJ population as defined by EEA (different from filed criteria)
  - Have historically low participation rates, defined as 27% or less (different from filed criteria of 32%)
  - *Note: Boston neighborhoods remain the same*

# EQUITY – TARGETED COMMUNITIES

## ► **IMPLICATION:**

- The anticipated result of this change is the expansion of the Targeted Communities list from 38 to 60 communities, including Boston neighborhoods.
- 11 Communities on the original filed list dropped off due to participation rates above 27%: Gardner, Gloucester, Malden, Montague, North Adams, Northampton, Palmer, Quincy, Stoughton, Wareham, and Williamstown.
- This change in the Targeted Communities does not affect eligibility for participation and ability for PAs to prioritize certain communities in Community First partnership offer.

## ► **EVALUATION AND TRACKING REQUIREMENTS:**

- DPU directs PAs to complete another non-participant study prior to the 2025-2027 Plan in order to measure progress on serving historically underserved customers.
- DPU directs the Program Administrators to track participation in all service territories by municipality (by neighborhood in Boston)

# Based on the DPU Order, the expected communities to be included on the list of targeted equity community list are below:

- ▶ **Green Text:** New Communities
- ▶ **Black Text:** Communities on the original list filed with the Plan
- ▶ **Red Text:** Communities removed from list based on new criteria

Acushnet	East Bridgewater	Huntington	Revere	Allston
Adams	Eastham	Lanesborough	Somerville	Brighton
Aquinnah	Edgartown	Lawrence	Southbridge	Dorchester
Attleboro	Everett	Lee	Springfield	East Boston
Avon	Fairhaven	Lowell	Swansea	Fenway
Barnstable	Fall River	Lynn	Taunton	Mattapan
Bourne	Falmouth	Marion	Tisbury	Mission Hill
Bridgewater	Fitchburg	Methuen	Warren	Roxbury
Brockton	Georgetown	Nantucket	Webster	Gardner
Brookfield	Great Barrington	New Bedford	West Brookfield	Gloucester
Chatham	Hamilton	North Attleborough	West Springfield	Malden
Chelsea	Hardwick	Oak Bluffs	Westport	Montague
Chicopee	Harwich	Peabody	Winchendon	North Adams
Dartmouth	Haverhill	Pittsfield	Worcester	Northampton
Dennis	Holbrook	Randolph	Yarmouth	Palmer
				Quincy
				Stoughton
				Wareham
				Williamstown

# ADDITIONAL EQUITY UPDATES FROM DPU ORDER

- ▶ **No changes to Equity Targets Framework or Equity Budgets**
- ▶ **Language Access Plan approved as filed**
- ▶ **Enhanced moderate income incentives approved**
  - **Weatherization required for moderate income heat pump incentive**
- ▶ **Renter Strategic Plan to be finalized and filed with DPU by 9/30/22**
- ▶ **Equity component of shareholder Performance Incentive approved, with modifications including requirement to file list of equity measures**