



EQUITY WORKING GROUP

► **July 11, 2022**

AGENDA

- ▶ **Welcome and review of remaining meeting schedule for 2022**
- ▶ **Status updates**
 - Moderate income: income verification, heating equipment incentives, pre-weatherization barriers (PAs)
 - Language Access Plan procurement (PAs)
 - EJ Municipalities Equity Targets (Maggie)
- ▶ **Renter Strategic Plan--June 30 Draft**
 - Plan overview (PAs)
 - Comparison of renter plan content to EWG and Council recommendations (Margie)
 - Discussion
- ▶ **Moderate income program delivery: next steps following EEAC feedback (PAs)**

2022 MEETING SCHEDULE AND TOPICS

Meeting Date	Meeting Topics
July	Discuss Strategic Renters Plan
August	<ol style="list-style-type: none">1. Finalize Strategic Renters Plan Comments2. Community Partnerships
September	Equity Targets for EJ Municipalities
October	Small Business
December	<ol style="list-style-type: none">1. Language Access Plan update2. Workforce Development

GENESIS OF STRATEGIC PLAN FOR RENTERS

► **Equity Target for Renters**

- PAs will prepare a strategic plan with detailed examples of how the PAs will serve renters, with a draft by the end of Q2 2022, and a final by the end of Q3 2022.

► **DPU Order on 2022-2024 Plan**

- [N]o later than September 30, 2022, the Administrators shall file a finalized strategic renter plan with the Department, describing what new protocols have been put into place and what additional steps remain to be taken to increase service to renters and landlords.



**COMPARISON OF STRATEGIC
RENTERS PLAN TO PRIOR
EWG AND COUNCIL
RECOMMENDATIONS**

APPROACH TO COMPARISON

- ▶ **Titles of following slides include each of the EEAC's and EWG's July 13, 2021 comments related to renters and landlords on PA's April Draft Plan**
 - <https://ma-eeac.org/wp-content/uploads/EEAC-EWG-Comments-7.13.21-FINAL.pdf>
- ▶ **Detailed input is from the Feb. 24, 2021 Council-Approved Equity Recommendations**
 - These recommendations were developed using stakeholder input supplied during EWG meetings in 2020
 - <https://ma-eeac.org/wp-content/uploads/FINAL-Equity-Recommendations-APPROVED-2.24.21.pdf>
- ▶ **Comments from EWG on Strategic Renters Plan Tactics PAs presented on March 25 are compiled in Appendix**

INCLUDE MORE INNOVATIVE APPROACHES FOR REACHING LANDLORDS

Detailed Input from EWG & Council	Draft Strategic Renters Plan
Develop alternative sales and/or delivery models for rental property segment (e.g., landlord association, other third party)	Plan does not address sales or delivery models for rental properties
Develop compelling case for participation by developing case studies when new program offerings become available	Plan does not address case studies
Employ “closers” who get paid to close projects and/or revise Mass Save sales compensation model	Plan does not address sales compensation model

INCLUDE MORE INNOVATIVE APPROACHES FOR REACHING LANDLORDS (CONTINUED)

Detailed Input from EWG & Council	Draft Strategic Renters Plan
Provide referral incentives to landlords and tenants who refer their landlords	Plan does not address referral incentives
Collaborate with rental owners on program design	In Progress To Date Section of Plan: “[T]he PAs consistently and proactively marketed to and sought feedback from landlords through various landlord meetings, including one hosted by the statewide group, MassLandlords.”
Develop a marketing offer that combines energy efficiency and other building upgrades to attract new program participants	”[T]he PAs will explore partnerships with local water departments to market energy efficiency programs to landlords.”

DEVELOP PARTICIPATION GOALS BY BUILDING SIZE, PARTICULARLY FOR SMALLER MF BUILDINGS WITH 3-9 UNITS

Detailed Input from EWG and Council	Draft Strategic Renters Plan
<p>Equity Targets include separate participation targets for:</p> <ul style="list-style-type: none">• Renter unit participation (RCD)• Attached low rise units (RCD and Income Eligible)	<p>Plan references renter unit participation target, but does not mention attached low rise target</p> <p>Aside from following, no mention of specific strategies to target and enroll smaller MF properties: <i>“Some Program Administrators have engaged vendor resources dedicated to the recruitment, coordination, and participation of landlords of multiple 2-to-4 unit properties.”</i></p>

DEVELOP PLANS FOR SERVING RENTAL C&I PROPERTIES, PARTICULARLY SMALL- AND MICRO-BUSINESS

Detailed Input from EWG & Council	Draft Strategic Renters Plan
No additional input provided	Plan does not address rental C&I properties

INCLUDE PLANS FOR INTEGRATED SERVICE DELIVERY AND ONE POINT OF CONTACT FOR LANDLORDS

Detailed Input from EWG & Council	Draft Strategic Renters Plan
Address pre-weatherization barriers	Plan does not address pre-weatherization barriers
Continue and enhance efforts to provide integrated service delivery with one point of contact for owner	“A dedicated vendor resource will provide all-in-one consultation services with landlords including recruitment and enrollment in the programs, then performing the assessment or walkthrough of their properties to identify energy-saving opportunities, and then working with the landlord to find what incentives and energy efficiency measures work for them and their properties. “

SUMMARY

- ▶ **Stated goal of PAs' Strategic Renters Plan is “to expand marketing and outreach strategies to target renters and landlords to enroll them in Mass Save programs and offerings” and plan does include a number of new outreach strategies, including new partnerships**
- ▶ **Plan does not include many of the innovations in program design and delivery that the EWG and Council recommended as a result of stakeholder input**
- ▶ **Scope of plan does not include small C&I renters and plan doesn't specifically address small residential multifamily properties**

DISCUSSION



- ▶ **Good elements of Plan**
- ▶ **Areas of needed improvement**
- ▶ **Initial recommendations**



APPENDIX

**EWG Feedback On Renters Strategic
Plan Tactics Presented By PAs 3.25**

OVERALL FEEDBACK, INCLUDING PLAN FOCUS, SCOPE, AND GOALS

- ▶ **While expanded marketing and outreach strategies are a crucial element of the strategic plan, the focus should go beyond enrolling customers in the PAs current offers and be expanded to included modified program designs that will be more appealing to prospective customers and increase enrollment.**
 - Findings from two recent evaluations (see links below) support the idea that changes to the program design and incentive structure are needed in order to effectively improve service to renters and LL's, including with respect to increasing installation of heat pumps in multifamily buildings
 - https://ma-eeac.org/wp-content/uploads/MA21R35-MF-HP-Barrier-Study_Report_FINAL_25MAR2022.pdf
 - https://ma-eeac.org/wp-content/uploads/MA21R36-B-MFB-Small-MF-Barriers_Report_FINAL_11MAR2022.pdf
- ▶ **Renter Strategic Plan should address all findings from the two studies**

OVERALL FEEDBACK, INCLUDING PLAN FOCUS, SCOPE, AND GOALS (CONTINUED)

- ▶ **Plan scope should include resi, income eligible, and small C&I**
- ▶ **Plan goals should include the equity targets for attached low rise (including both res and income eligible) as well as the increase in renter unit participation**
- ▶ **Other**
 - Marketing efforts should also be accessible for residents with limited English proficiency
- ▶ **How will LEAN be looped into the Plan development process?**

FEEDBACK RELATED TO PARTNERSHIPS

- ▶ **2-3 partnerships/year with statewide groups is a modest goal**
 - The Community First partnership program is important but is a “given”. If there are only going to be 2-3 partnerships/year, partnerships under Community First shouldn’t count toward the proposed 2-3.
- ▶ **Partnerships should focus on:**
 - landlord associations and management companies in this first year
 - Local/community organizations will be most important
 - Please be sure strategic plan includes detailed strategies for community level.

FEEDBACK RELATED TO PARTNERSHIPS (CONTINUED)

- ▶ **Expressed support for partnerships with:**
 - property management companies near university to target 2–4-unit properties
 - Neighborhood & Landlord Association Partnerships
 - potentially the home insurance and local health agencies
 - Cities and towns (important partners for unlocking the investments in rental units that have been allocated to renters.)
 - MA Department of Elder Affairs, Councils on Aging—can connect us with others who help elders with paying their utility bills and who may be good partners
 - local groups (in EJ communities) that are interested in housing
- ▶ **Unclear how promoting renter offer to 1st time home buyers is relevant. Please explain**
- ▶ **Focus should be on results from partnerships, not the number of partnerships**

FEEDBACK RELATED TO OTHER TACTICS

- ▶ **"Expand Targeted Strategy w/dedicated Landlord Resource from CLEAResult – Targeting property management of 2-4 Units." Seems promising, but more detail, including on the targeted strategy, is needed. Ideas previously discussed:**
 - One clear Point of Contact for each building owner/renter
 - Plug and play whole-building services
 - Collaborate with rental owners on program design (has this happened?)
Develop participation goals by building size, particularly for smaller multifamily buildings with 3-9 units
 - Employ “closers” who get paid to close projects
 - Referral incentives
 - Work closely with the municipalities and local CBOs to target, cobrand, and bring in closers
 - Develop compelling cases for participation, using financials and highlighting renter retention benefits
 - Develop plans for serving rental C&I properties, particularly small- and micro-business

FEEDBACK RELATED TO OTHER TACTICS (CONTINUED)

- ▶ **Support expressed for how-to videos for renters on the mass save website, but other strategies are needed for more comprehensive and significant impact, and these strategies must be devised and rolled out ASAP**
- ▶ **Good initial list on slide 11, but getting smaller buildings enrolled will require a “boots on the ground” strategy. These types of landlords are not likely to participate in roundtables.**

FEEDBACK RELATED TO METRICS

- ▶ **Focus should be on results from partnerships, not the number of partnerships**
- ▶ **Suggested metrics:**
 - # of 100% rental property weatherization incentives provided
 - # of new heating systems installed in rental properties by fuel type
- ▶ **Other potential metrics include previously-developed KPIs**

IDEAS FOR PARTNERS

- ▶ **Mimi Ramos: New England United for Justice, Right to the City - mimi@neunited4justice.org**
- ▶ **Neighbor to Neighbor: Andrea Nyamenkye - andrea@n2nma.org**
- ▶ **Karen Chen - Chinese Progressive Association - karen@cpaboston.org**
- ▶ **Mass Apartments Association; Builders of Color Coalition; BECMA**
- ▶ **Annette Duke, Mass. Law Reform Institute: should be able to help us reach out to housing advocates and housing groups across the state. aduke@mlri.org**
- ▶ **Lew Finfer, Mass. Community Action Network: Lew is a phenomenal organizer and in touch with a range of local groups, often faith-based organizations comprised of people of color/those for whom English is not the primary language. Energy/utility issues are not a priority for MCAN, but it would be great if MCAN would be willing to be a partner at some level.**