

→ CONSULTANT TEAM

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## INTRODUCTION

This document has been drafted to brief Councilors on key equity-related planning issues for the Mass Save® 2025-2027 Term energy efficiency plan in advance of a workshop meeting on October 10, 2023 dedicated to equity matters across all sectors. This brief is different from those for the Council's other workshops for this planning cycle in that the draft recommendations are being advanced by the EEAC's Equity Working Group (EWG), a subcommittee of the Council. This brief contains additional context and analysis to support Councilors' consideration of the recommendations.

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## OVERVIEW

The equity recommendations in this brief for the Mass Save 2025-2027 energy efficiency plan build on a foundation of more than a decade of advocacy, research, and implementation experience. The Residential and the Commercial and Industrial Small Business Nonparticipant Studies<sup>1</sup> completed in 2020 confirmed that certain customer groups—moderate income households, renter households, limited English-speaking households, and microbusinesses<sup>2</sup>—participate in Mass Save's energy efficiency programs at lower rates than other customers. These findings spurred creation of the Equity Working Group<sup>3</sup> by the EEAC in May 2020, and its work during the 2022-2024 planning cycle was instrumental to achieving a significantly increased focus on equity in that plan, including enhanced incentives, an equity component for the Performance Incentive mechanism, programmatic changes including the Community First Partnerships, and adoption of Equity Targets<sup>4</sup> for the Term.

A reminder that equity is not the same as equality. Equality means each individual or group of people is given the same resources or opportunities. Equity acknowledges that each person has different circumstances and allocates the necessary resources and opportunities to reach an equal outcome. Per the Metropolitan Area Planning Council's (MAPC) State of Equity Policy Agenda<sup>5</sup>, equity “requires restructuring deeply entrenched systems of privilege and oppression that have led to the uneven distribution of benefits and burdens over multiple generations. Society will be stronger when the promise in all of us is actualized.”

Achieving equity after a long period of inequitable investments and outcomes is no small feat. Although progress has been made, results to date in meeting the Equity Targets and other planning goals have fallen short in some areas. Achieving equity inevitably involves trial and error, and the Equity Working Group continues to work outside of the planning cycle to monitor progress on implementation and to collaborate with the Program Administrators (PA) on solutions to overcome remaining barriers. Furthermore, there is a need to recognize that the solutions to overcome these barriers will not always be the same across the Commonwealth. Equitable investments may not look or be the same in a rural community compared to an urban community. The PAs will need to partner with communities and deliver solutions that address their unique equity barriers.

The time period in which the EWG developed its recommendations for the 2025-2027 Three Year Plan was significantly compressed in comparison to the time period for developing recommendations for the 2022-2024 Three Year Plan. That said, the recommendation development processes themselves are fundamentally the same in that, for both sets of recommendations, the EWG hosted input sessions with stakeholders to learn more about their experiences with Mass Save and opportunities to overcome remaining barriers to participation. Stakeholders engaged in the recommendation development process for the 2025-2027 Plan include program contractors, Community First Partners, and customers (including landlords and tenants). Stakeholders provided input during EWG meetings dedicated to these topics:

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<sup>1</sup> Residential: [https://ma-eeac.org/wp-content/uploads/MA19X06-B-RESNONPART\\_Report\\_FINAL\\_v20200228.pdf](https://ma-eeac.org/wp-content/uploads/MA19X06-B-RESNONPART_Report_FINAL_v20200228.pdf)  
C&I: [https://ma-eeac.org/wp-content/uploads/Final-MA19X11\\_B\\_SBNONPART-Report-20200415-1.pdf](https://ma-eeac.org/wp-content/uploads/Final-MA19X11_B_SBNONPART-Report-20200415-1.pdf)

<sup>2</sup> Consumption (annual) of <0.11 GWh electricity or <8,000 therms gas.

<sup>3</sup> A list of the current members of the EWG may be found in Appendix A.

<sup>4</sup> <https://ma-eeac.org/wp-content/uploads/Attachment-B-Equity-Targets-Framework-Final.pdf>

<sup>5</sup> <https://equityagenda.mapc.org/>

- Low- and moderate-income electrification
- Community First Partnerships and language access
- Renters and landlords, small business
- Moderate income customers

The input they provided was extremely valuable and shaped many of the EWG’s recommendations. A list of the stakeholders who provided input to the EWG may be found in Appendix B.

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## EQUITY GUIDING PRINCIPLES FOR 2025-2027

The Equity Working Group’s recommendations for 2025-2027 are guided by three principles:

- Apply principles of distributive justice to redirect resources to underserved populations
- Improve/simplify customer experience
- Energize and resource communities to better serve their constituents through partnerships with Mass Save

### **Apply Principles of Distributive Justice to Direct Resources to Underserved Populations.**

Distributive justice refers to how benefits and burdens of living together as part of a society are experienced differently by members of society based on economic, political, and social structures. The EWG is committed to improving the distribution of energy efficiency resources and benefits across all populations within the Commonwealth and achieving greater equity. The 2025-2027 Term should be focused on maximizing benefits for those communities, social groups, or individuals least advantaged and/or most marginalized. As already noted, the Nonparticipant Studies completed in 2020 confirmed that certain customer groups—moderate income households, renter households, limited English-speaking households, and microbusinesses—participate in Mass Save’s energy efficiency programs at significantly lower rates than other customers. Applying the principles of distributive justice in the 2025-2027 plan will require a more deliberate emphasis in reaching and investing in communities and individuals who have historically participated in Mass Save at lower rates.

**Improve/Simplify Customer Experience.** Public input to the EEAC and the EWG has repeatedly emphasized that the complexity of the Mass Save programs—from eligibility determination to enrollment processes to multiple program offers and contractors—poses a barrier to participation. As a result, improving and simplifying the customer experience has been a consistent theme through the Council’s planning workshops for the 2025-2027 Term. While there are numerous reasons to improve and simplify the Mass Save experience for all customers, many of them are rooted in considerations of equity. Because the circumstances of underserved customers result in barriers to participation that historically well-served customers do not face, simplifying and improving the customer experience for underserved customers is particularly important. Limited proficiency in English, for example, poses a barrier to a customer seeking to take *one* step to access an energy savings opportunity, much less to take many (e.g., research program offers on website, make a call to Mass Save, interact with an auditor and subsequent contractors, secure financing). And while the amount of time and energy it takes to navigate and attend to the many steps involved in the Mass Save process poses a barrier for all customers, that barrier is magnified for underserved customers because they are more likely to face other barriers (e.g., limited proficiency in English, limited financial resources, limited “free” time due to responsibilities associated with being a landlord or having multiple jobs.) Simplifying access to Mass Save’s programs will enable these customers to participate more easily.

Customers should be served comprehensively through a process that is as simple and straightforward as possible without compromising quality, safety, or satisfaction. The Mass Save journey should not require the customer to coordinate and manage interactions with multiple contractors, with varying interests and levels of expertise. Bundling of services through a “general contractor” is viewed by the EWG as an appropriate approach to serving customers. Until this type of one stop shop service can be achieved, a project

facilitator/navigator or supported journey should be required.

In sum, underserved customers should have “ready access” to weatherize and electrify or make their buildings electrification-ready through the employment of approaches that significantly reduce barriers to entry and implementation, including:

- Simplified qualification mechanisms/requirements,
- project facilitation/project management,
- technical assistance/support, and
- increased incentives for weatherization (often abbreviated as Wx), heat pumps, and barrier mitigation to enable weatherization and/or electrification/electrification ready.

### **Energize and Resource Communities to Better Serve Their Constituents Through Partnerships with Mass Save.**

The Equity Working Group maintains that communities, including geographic areas with high levels of underserved customers<sup>6</sup> and Community First Partnership (CFP) communities<sup>7</sup>, play a key role in achieving equity in the delivery of energy efficiency. Delineating geographic focus areas where customers are automatically eligible for expanded services (project management/facilitation/technical assistance) and increased financial support (e.g., 100% cost coverage for weatherization and heat pumps), as well as improving support provided through the Community First Partnerships, should center our equity efforts during the 2025-2027 Term. In CFP communities, residents and small business owners should have access to local quarterbacking/project management/heat pump coaching services, and in specific focus areas with high levels of underserved populations<sup>8</sup>, there should be automatic eligibility for all rental properties with 100% incentives for weatherization, heat pumps, and (to the extent possible) mitigation of barriers to energy efficiency and heat pumps. In addition, eligibility requirements for all moderate-income customers should be streamlined and Mass Save should provide increased incentives for qualified moderate income customers.

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## **RECOMMENDATIONS AND SUPPORTING INFORMATION**

### **Overview**

As stated earlier in this brief, equity acknowledges that each person has different circumstances and allocates the necessary resources and opportunities to reach an equal outcome. In their 2022-2024 Plan, the PAs started acknowledging and seeking to address historic imbalances in several regards, including creation of an Equity component to the Performance Incentive mechanism to reward benefits achievements in underserved communities and \$136 million in dedicated moderate-income weatherization and heating equipment incentives. Based on reported performance data—including from the Equity Targets—and reflecting input from stakeholders, the Equity Working Group maintains that the PAs must strive even further to achieve equitable outcomes in the 2025-2027 Term. In the context of Mass Save and its history, restructuring deeply entrenched systems of privilege and oppression inherent in society requires that resources historically realized by more affluent customers and communities through the Residential Sector programs must in the future be more deliberately directed to less-resourced, underserved customers and communities who face relatively more barriers to Mass Save participation compared to historically well-served customers.

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<sup>6</sup> The EWG, DOER and the Program Administrators will work collaboratively to determine the specific focus areas eligible to receive enhanced offerings. See Recommendation I.C. for a list of considerations to determine eligible areas.

<sup>7</sup> Input from the Community First Partners and their lead vendor, All In Energy, indicates that community partners are able to connect underserved populations with Mass Save services.

<sup>8</sup> The EWG, DOER and the Program Administrators will work collaboratively to determine the specific focus areas eligible to receive enhanced offerings. See Recommendation I.C. for a list of considerations to determine eligible areas.

With this context, and based on the guiding principles described above, the EWG has developed a set of recommendations designed to work together to achieve more equitable outcomes. In general, the recommendations are designed to provide additional comprehensive resources through easily accessible Mass Save processes to underserved customers. A centerpiece of the recommendations are offers providing 100% cost coverage for weatherization and heat pumps to underserved customers, with streamlined eligibility and qualification requirements based on geography. In addition, improvements to equitable outcomes do not occur overnight, and it is critical that data collection supports measurement and analysis of progress over time. The Equity Targets and associated reporting during the 2022-2024 Term have been valuable in identifying where course corrections are needed. It is important that data collection efforts and the Equity Performance Incentive mechanism continue to be a high priority in 2025-2027 and that they be updated to reflect the equity recommendations for the new Term.

Finally, the recommendations provide foundational principles and other strategies to support equity across the board, as well as further address specific customer segments and communities (e.g., small business, English-isolated customers, Community First Partnerships).

### **Organization of the Recommendations:**

The EWG recommendations are organized as follows:

- Geography-based offers
- Other recommendations:
  - Foundational principles
  - Community First Partnerships
  - Language access
  - Workforce
  - Small business
  - Measuring success

## **I. RECOMMENDED GEOGRAPHY-BASED OFFERS FOR RENTAL PROPERTIES AND MODERATE-INCOME CUSTOMERS**

There are communities in the Commonwealth with relatively low average household incomes, high proportions of racial and ethnic minorities and immigrants, older building stock, lower rates of home ownership, and lower rates of participation in Mass Save programs. These are the communities that the Equity Working Group believes should receive the highest levels of investment in the 2025-2027 Term. The EWG maintains that the list of Environmental Justice Communities the Department of Public Utilities (DPU) identified in its Order approving the 2022-2024 Plan<sup>9</sup> is overly broad. The recommended offers for enhanced incentives and services described below should represent an increased focus on populations with the most barriers to accessing Mass Save benefits in the Commonwealth. This will require a careful balancing of appropriate demographic, income, and participation criteria, practicality of administration, and budgetary implications. The PAs and DOER will work to identify a geographic solution for this approach in consultation with the EWG.

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<sup>9</sup> The DPU changed the criteria agreed to by the PAs, DOER, and the Equity Working Group, resulting in a larger group of communities (61 vs. 38) and elimination of an income-based criterion.

## Offer and Recommendations That Apply Within To-Be-Determined Geographic Area(s)

Property type	Eligibility process	100% Wx incentive	Expanded funding for pre-Wx barrier mitigation	100% Heat pump	100% Panel upgrade	100% Targeted air sealing	100% Window	Services to reduce customer time and effort	Other/appliance
Rental property-Wx only	Automatic	Yes	Yes	N/A	N/A	N/A	N/A	Support services (project facilitation similar to a general contractor, heat pump coaching)	Increased rebate for efficient electric appliances, including induction stoves
Rental that wants to electrify	Automatic			Yes (case by case for gas)	Yes	Yes*	Single to triple pane. Consider double to triple	Support services (project facilitation similar to a general contractor, heat pump coaching)	Same as above, plus an added bonus amount for induction stoves
Non-rental-Wx only	Automatic	Yes	Yes	N/A	N/A	N/A	N/A	Support services (project facilitation similar to a general contractor, heat pump coaching)	Increased rebate for efficient electric appliances, including induction stoves
Non-rental that wants to electrify	Some kind of income verif. (simplified or current PA process)			Yes (case by case for gas)	Yes	Yes*	Single to triple pane. Consider double to triple	Help with income verification plus support services	Same as above, plus an added bonus amount for induction stoves

Wx=weatherization

\*Note: it is assumed that properties that want to electrify & receive the enhanced electrification incentives would also weatherize, and that funding for targeted air sealing would be part of that.

### **A. RECOMMENDATION: Develop and implement a residential offer, in select geographic areas, to provide rental properties with an offer that includes automatic qualification for measures as depicted in the chart above, including the following:**

1. 100% cost coverage for weatherization
2. An expansion of and/or increase in funding for pre-weatherization barriers as appropriate
3. 100% cost coverage for heat pumps and for pre-electrification barriers (e.g., electrical panel upgrades)

The EWG recognizes that utility costs may increase when heat pumps are installed, and that such increases may be due to gas-to-electric conversions (particularly where the home is not weatherized or where an existing boiler or furnace has a greater than 90% efficiency or AFUE) and/or “cost-shifting” when central fossil fuel systems are converted to heat pumps on individual tenant meters. Refer to Foundational Principle II.C. below for the EWG’s recommendation to address this issue.

4. Increased rebates for efficient electric appliances, including induction stoves
5. Where properties electrify, an increased rebate for induction stoves

**B. RECOMMENDATION: Develop and implement a residential offer, in select geographic areas, to provide non-rental properties with an offer that includes qualification mechanisms and measures as depicted in the chart above, including the following:**

1. Automatic qualification for:

- a. 100% cost coverage for Wx
- b. An expansion of and/or increase in funding for pre-Wx barriers as appropriate
- c. Increased rebates for efficient electric appliances, including induction stoves

2. Qualification based on income:

- a. 100% cost coverage for heat pumps and pre-electrification barriers

The EWG recognizes that utility costs may increase when heat pumps are installed, and that such increases may be due to gas-to-electric conversions (particularly where the home is not weatherized or where an existing boiler or furnace has a greater than 90% efficiency or AFUE). Refer to Foundational Principle II.C. below for the EWG's recommendation to address this issue.

- b. For properties that electrify, an increased rebate for induction stoves.

**C. RECOMMENDATION: By January 15, 2024, the Mass Save Program Administrators and DOER, with input from the EWG, will determine geographic areas in which to provide the offers described in I.A. and I. B. above. In designating such areas, the following types of factors will be considered:**

- Average or median income level of residents
- The historical level of Mass Save investment in the area
- Whether or not the area is a Gateway City as defined by M.G.L.ch. 23A section 3A
- Average education level of residents
- Minority status of residents
- The extent to which residents are English-isolated
- The percent of primary residences relative to the percent of "second homes" in the area
- Minimizing "free ridership" to the appropriate extent, keeping in mind the goal of distributive justice (increasing investment in areas that have been historically under-invested in)
- Include an appropriate method of limiting luxury and/or newer rental property participation to prevent receipt of enhanced rebates, incentives, or services to market rate customers
- Consider First Street Foundation's Flood Factor<sup>10</sup>, provided it remains publicly available, based on

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<sup>10</sup> Available free of charge at <https://riskfactor.com/>.



simply address

- Impact on the Mass Save residential budget
- Ease of implementation, including, for example, messaging or impact on the rebate or incentive delivery process

### Offers and Recommendations That Apply to Moderate Income Customers Outside The To-Be-Determined Geographic Areas

Moderate income customers are households whose income is between 61% and 80% (inclusive) of state median income (SMI) or area median income (AMI), whichever allows for greater participation.

Upgrade outcome	Eligibility process	100% Wx incentive	Expanded funding for pre-Wx barrier mitigation	100% Heat pump	100% Panel upgrade	100% Targeted air sealing	100% window	Services to reduce customer time/effort	Other appliance
Wx only	Some kind of income verification (simplified or current PA process)**	Yes	Yes	N/A	N/A	N/A	N/A	Help with income verification. Support services (project facilitation similar to a general contractor, heat pump coaching),	Increased rebate for efficient electric appliances, including induction stoves
Electrification/ heat pumps	Some kind of income verification (simplified or current PA process)			Yes (case by case for gas)	Yes	Yes*	Single to triple pane. Consider double to triple	Help with income verification. Support services (project facilitation similar to a general contractor, heat pump coaching),	Same as above, plus an added bonus amount for induction stoves

\* Note: it is assumed that properties that want to electrify & receive the enhanced electrification incentives would also weatherize, and that funding for targeted air sealing would be part of that.

\*\*This is not meant to change the current offer of 100% cost coverage for Wx for 2–4-unit homes.

#### D. RECOMMENDATION: Develop and implement an offer for moderate income customers outside select geographic areas, to include the following (See chart above for a visual depiction):

1. 100% cost coverage for Wx
2. An expansion of and/or increase in funding for pre-Wx barriers as appropriate
3. Increased rebates for efficient electric appliances, including induction stoves
4. 100% cost coverage for heat pumps and pre-electrification barriers (e.g., electrical panel upgrades)



The EWG recognizes that utility costs may increase when heat pumps are installed, and that such increases may be due to gas-to-electric conversions (particularly where the home is not weatherized or where an existing boiler or furnace has a greater than 90% efficiency or AFUE) and/or “cost-shifting” when central fossil fuel systems are converted to heat pumps on individual tenant meters. Refer to Foundational Principle II.C. below for the EWG’s recommendation to address this issue.

5. Where properties electrify, an increased rebate for induction stoves

## OTHER RECOMMENDATIONS

### II. FOUNDATIONAL PRINCIPLES

**A. RECOMMENDATION: Where qualification is based on income, utilize area median income (AMI) or state median income (SMI), whichever allows for greater participation.**

**B. RECOMMENDATION: To inform the 2025-2027 Three Year Plan, the Mass Save Program Administrators and DOER, with input from the EWG, will determine an appropriate income verification process for offers where qualification for financial support for measures, or for services, is not automatic and is based on income. The purpose is to simplify and streamline the customer income qualification process to the extent possible and appropriate, and the approaches listed below shall be considered. Note that this list is not meant to be exhaustive and other approaches may be considered.**

1. “Self-attestation plus follow-up checking” for moderate income residents that do not meet the automatic qualification requirements.
  - a. Consider a self-attestation pilot in Lawrence or Lowell
  - b. Consider ways to limit the “luxury” and/or newer rental property participation to prevent receipt of enhanced rebates, incentives, or services to market rate customers
2. Use software that provides real-time, “instant” approval of income qualification determination
3. The current PA process for income verification.

**C. RECOMMENDATION: To inform the 2025-2027 Three Year Plan, with input from DOER and the EWG, the PAs will work to identify and implement approaches designed to address the potential increase in utility costs that may occur when heat pumps are installed. The EWG recognizes that such increases may be due to gas-to-electric conversions (particularly where the home is not weatherized or where an existing boiler or furnace has a greater than 90% efficiency or AFUE) and/or “cost-shifting” when central fossil fuel systems are converted to heat pumps on individual tenant meters. Examples of approaches that should be considered to address this issue include:**

- Requiring that heat pumps be placed on a landlord-owned panel
- Providing landlords with information about their responsibilities as landlords, including the legal prohibition against violating a lease provision stating that heat will be included in rent
- Providing homeowners, landlords and tenants with the following types of written information:
  - The Massachusetts Green Communities Act requires that Massachusetts be net zero greenhouse gas emissions by 2050,
  - Heat pumps can reduce greenhouse gas emissions (e.g., they provide both heating and air conditioning with zero on-site fossil fuel emissions),
  - Utility costs may increase as a result of installing heat pumps
  - Steps that can be taken to mitigate potential utility bill increases
  - Requiring renters to sign an approval form with the information above to agree to the install

**D. RECOMMENDATION: The PAs, with input from DOER and the EWG, shall develop and implement cost management strategies.**

1. Consider fixed pricing model for heat pumps as used in weatherization. (Note that a fixed pricing model may be most workable in situations where building typologies and associated heating system configurations can be identified and standardized.)
2. By January 2025, the PAs, in consultation with DOER, shall explore the extent to which they can implement an RFP for vendors to provide bundled services (pre-Wx, weatherization, heat pumps), at fixed prices (or within specified price ranges), as used in weatherization, and report back, by said date, as to how this can be implemented.

**E. RECOMMENDATION: To minimize customer out-of-pocket expenses, develop and implement approaches to provide instant approval of equipment/measure eligibility, and instant receipt of, financial support for equipment/measures. Approaches may be implemented initially for moderate income customers and subsequently expanded.**

1. Maintain quality assurance and quality control provisions that minimize burdens on the customer and contractor
2. Offer “instant payment” for any measures for which financial support is being provided so customers do not have any out-of-pocket expense. The PAs should ensure systems to provide direct payment to contractors in a timely manner for work.
3. Explore and implement other approaches as appropriate, such as increasing the number of contractors qualified to receive direct payments and instituting a coordinated delivery model for moderate income customers. PAs should consider setting up a pre-funded incentive account for contractors that participate in these programs for the purpose of not requiring contractors to float the money for instant rebates given to customers. This account could be pre-funded and reconciled regularly (e.g., quarterly).

**F. RECOMMENDATION: Simplify the customer journey by facilitating access to services regardless of entry point.**

1. Customers should be able to apply for energy efficiency services with a minimum of effort. Customers should not have to ask for service twice or be told to call another number. (The related accounting for budget and savings allocations can happen behind the scenes on the back end.)
2. All contractors should be able to seamlessly direct a customer to any service (e.g., warm hand off). Consider the following:
  - a. Supporting a referral pool for contractors to pass on projects that they cannot address due to time/geographic/technological constraints
  - b. A small referral fee if a project is completed by another contractor
  - c. Encouraging contractors to build partnerships with other contractors to provide whole building services to a customer from what appears to be a one-stop contractor
3. LEAN and the PAs should continue and expand efforts for cross training of service providers between the IES and Residential programs

**G. RECOMMENDATION: Provide all customers with simple, prioritized multistep action plan.**

1. Improve messaging to provide information in a clear and easily understandable format
2. Prioritize customer education during each step of the process

**H. RECOMMENDATION: As depicted in the charts above, provide facilitated support for customers through adoption of recommendations including general navigation, project facilitation, technical assistance and evaluation of quotes.**

**I. RECOMMENDATION: Provide additional service delivery improvements to reduce barriers to participation.**

1. Retain a lead vendor to serve multifamily rental properties. The lead vendor should have expertise in serving multifamily properties (including smaller rental properties) and English-isolated customers, and in implementing community-based approaches.
2. Work with municipalities served by Municipal Light Plants to develop a co-delivered offer for multifamily customers with gas through the investor-owned utilities, leveraging IRA funds as available

**J. RECOMMENDATION: Increase budget and plan goals for all moderate income BCR measures in absolute numbers and as a proportion of Residential Sector spending and goals (distributive justice)**

### **III. COMMUNITY FIRST PARTNERSHIPS (CFPs)**

**A. RECOMMENDATION: Provide additional funding to support, as needed, hiring a heat pump coach, a facilitator/quarterback, and a small business liaison in each community, as well as to support language services, as needed.**

1. Increase CFP budget to achieve objectives included in these recommendations
2. Provide additional flexibility for the program to support innovative, place-based solutions

**B. RECOMMENDATION: Support the CFPs' outreach efforts with collateral material tailored to the CFP needs.**

1. Provide individualized marketing materials
2. Work with CFPs to develop outreach efforts
3. Expedite PA approval process

**C. RECOMMENDATION: Work to improve data availability tailored to the CFP needs**

1. Develop protocol to provide CFPs with access to information on what buildings have been served with what services so they can effectively target

**D. RECOMMENDATION: Continue to work to increase the number of EJMs participating in Mass Save as CFPs.**

1. Consider developing a referral program that has the ability to recognize community members within EJMs that refer other community members to services that they have received through Mass Save.

### **IV. LANGUAGE ACCESS**

**A. RECOMMENDATION: Provide end-to-end language support for all customers at all stages of service, including through Community Partners.**

1. Begin this process with seven languages: Haitian Creole, Portuguese, Arabic, and all additional languages required by the US Election Assistance Commission's Language Access Designations pursuant to Section 203 of the Voting Rights Act (at time of recommendation, Spanish, Chinese,

Vietnamese and Khmer (Cambodian)). Continue with other languages as appropriate.
2. Work to enhance language support to increase access on a community level (e.g., through CFPs) as appropriate.
<b>B. RECOMMENDATION: Prioritize hiring of multilingual staff for all Mass Save programs.</b>
1. Increase visibility of indirect providers with additional language capabilities
<b>C. RECOMMENDATION: Record customer’s preferred language at every interaction.</b>
<b>V. WORKFORCE</b>
<b>A. RECOMMENDATION: Through PAs’ efforts and in coordination with MassCEC, ensure that equity considerations are included in workforce development recommendations from both the customer and contractor standpoint.</b>
1. Ensure that the workforce is equipped to serve language isolated customers
2. Ensure that workforce efforts are designed to foster diversity amongst contractors. Document which contractors are certified MWBEs in the various qualified contractor networks (home performance contractors (HPC), independent insulation contractors (IIC), and heat pump installer network (HPIN)). Additionally identify which contractors can provide services in languages other than English and document on the Mass Save website. Note that this self-identification could be optional.
3. Consider adjustments to qualifications to ease entry for returning citizens
4. Establish a Contractor Development Pathway
5. Clearly define the contractor journey pathway
6. Provide contractor- facing information about the Mass Save programs on the Mass Save website.
7. By January 2025, review background check requirements and implement changes to ease requirements as appropriate to encourage opportunities for potential employees while appropriately protecting the safety and security of participants.
<b>VI. SMALL BUSINESS</b>
<b>A. RECOMMENDATION: Ensure that equity considerations are included in program design/implementation of any small business programs.</b>
1. Provide translation services for Main Streets events
<b>B. RECOMMENDATION: Provide concierge services for small businesses</b>
<b>VII. MEASURING SUCCESS</b>
<b>A. RECOMMENDATION: Re-evaluate Equity Performance Incentive mechanism to ensure alignment with 2025-2027 EWG recommendations.</b>
<b>B. RECOMMENDATION: Revise the Equity Targets as a collaborative effort between the PAs, DOER and the Consultants, and the Equity Working Group to reflect the increased emphasis on equitable outcomes and the Equity Working Group’s priorities and recommendations for the 2025-2027 Term.</b>
<b>C. RECOMMENDATION: Provide consistent tracking and reporting of data to assess progress toward achieving recommendations, including for “ready access” geography-based rental property and moderate-income programs described above, and for multi-family projects (by project type, e.g.,</b>

building size, ownership status, projects in certain geographies).

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## SUMMARY

Equitable decarbonization must be the focus and outcome of the 2025-2027 Mass Save Energy Efficiency Plan. The Equity Working Group's priorities and recommendations are advanced to improve progress in ensuring that LMI customers, English-isolated customers, tenants, small landlords, and small businesses reap the benefits that have historically accrued to more well-resourced customers and communities.

## APPENDIX A: EQUITY WORKING GROUP MEMBERS

Member	Position
Jo Ann Bodemer, DOER	Councilor representing DOER
James Collins, LEAN	Councilor representing the low-income weatherization and fuel assistance network
Charlie Harak, National Consumer Law Center	Councilor selected by the EEAC
Kyle Murray, Acadia Center	Councilor selected by the EEAC
Will Rose, Attorney General's Office	Councilor representing the Attorney General's Office
Co-chair Mary Wambui, Planning Office for Urban Affairs	Councilor representing Residential Consumers
Co-chair Brooks Winner, Metropolitan Area Planning Council	Councilor representing Commonwealth Cities and Towns
Margaret Downey, Cape Light Compact	Program Administrator
Jhenny Saint Surin, Eversource	Program Administrator
Sonakshi Saxena, National Grid	Program Administrator
Stephanie Terach, Liberty Utilities	Program Administrator
Cindy Luppi, Clean Water Action/Green Justice Coalition	Representing organizations that are not represented on the EEAC, selected by the seven Councilors of the Equity Working Group
Doug Quattrochi, Mass Landlords	Representing organizations that are not represented on the EEAC, selected by the seven Councilors of the Equity Working Group
Alexis Washburn, Emerald Cities Collaborative	Representing organizations that are not represented on the EEAC, selected by the seven Councilors of the Equity Working Group
Benjamin Cartwright	EEAC Consultant
Margie Lynch	EEAC Consultant

## APPENDIX B: PARTICIPATING STAKEHOLDERS

TOPIC	STAKEHOLDER
<b>Low- and moderate-income electrification</b>	Dave Boettcher, Abode
	James Collins, Brian Beote, and Orest Manzi, LEAN
	Travis Estes, Abode
	Bill Graham, HomeWorks Energy
	Jacob Grier, Cape Cod Heat Pumps
	Mike Harris, Cape Cod Heat Pumps
	Chris Nichols, HomeWorks Energy
<b>Community First Partnerships</b>	Sherdyl Fernandez-Aubert, Berkshire Regional Planning Commission
	Degen Larkin, City of Boston
	Alex Pratt, City of Malden
	Alex Train, Chelsea Dept of Housing and Community Development
	Victor Vargas, City of Lowell
	Fangxue Zheng, Quincy Asian Resources Inc. (Quincy & Randolph)
<b>Renters and Landlords</b>	Hessann Farooqi from Boston Climate Action Network—representing renters
	Mary Knittle, Worcester Community Action Council
	Lisette Matos, landlord in Northern Worcester County
	Doug Quattrochi, MassLandlords
	Russell Sabadosa, landlord in Hampden County
<b>Moderate Income</b>	Chris Nichols, HomeWorks Energy
	Abel Vargas, Valley Home Insulation
	Gemma Wilkens, City of Gloucester