Council-Approved Equity Recommendations 2/24/2021

<u>**PARTNERSHIPS**</u>

Enhance Community Partnerships

1. Ensure incentives and other means of support are adequate to meet partners' needs
    -   Provide guaranteed financial support at the beginning of the program year to support CBO and municipal staff capacity both internally and through their external partners
2. Tie partnership goals specifically to increases in participation by renters, moderate income customers, and language isolated customers, which is not currently the case for the Municipal Partnership Program
3. Enable more different and innovative pathways that partnerships could follow
    -   Flexible, customized, and targeted approaches to better meet needs of individual communities and priorities within a community
4. Create goal-setting and evaluation mechanisms in collaboration with partners
5. Increase the number of participating municipalities and allow municipalities to submit multi-year applications
6. Increase access to, transparency around, and granularity of data by:
    -   Standardizing data collection and reporting across all PAs
    -   Developing data sharing agreements between program partners and PAs
    -   Providing regular trainings to interested stakeholders on the Mass Save Data
    -   Providing support and technical assistance to smaller community based organizations and municipalities as they navigate data
7. Streamline process and give program partners more flexibility to develop marketing materials that will resonate with their community

Develop Additional Pathways for Community Partnerships

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

Invest in Community-based Partnerships

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

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

Prioritize Underserved Communities

16. Use quantitative information where available to determine geographic areas and population groups that should be targeted with partnerships
    - History of underservice
    - Income / energy burden
    - Language
    - Race or ethnicity
    - Environmental burdens

WORKFORCE DEVELOPMENT

Increase the Diversity of the Workforce Supporting Mass Save

1. Assess and revise vendor solicitation processes

    - Minimize use of invite-only procurements
    - Include certified DBEs 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
        - o Require lead vendors to partner with DBEs on all Mass Save contracts
    - Make selection criteria objective and transparent to avoid implicit bias
    - Host webinars and trainings, and provide technical assistance to help vendors navigate the procurement process

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

    - Identify new DBE firms; support eligible vendors to pursue diversity certification or small business certification

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

    - Provide detailed technical assistance to vendors as they develop formal diversity, equity, and inclusion policies

4. Create and keep up-to-date 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

- Make a concerted effort to identify key upskilling opportunities for the incumbent workforce and develop new training opportunities where there are gaps
- Coordinate with the trade ally network and training providers to ensure that graduates of training programs have direct access to job opportunities with Mass Save contracted vendors
- Expand geographic access to training opportunities by providing virtual and in-person trainings throughout the Commonwealth

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

- Engage with community-based organizations and industry groups / associations that focus on diverse businesses

Attract and Train Young and Diverse Persons for Participation in the Energy Efficiency Workforce

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

- Create multiple viable career pathways to illustrate career opportunities available to new entrants in the workforce
- Establish energy efficiency career days where students can learn firsthand from energy efficiency workers
- Make direct connections between careers in energy efficiency and climate and the environment

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

- Partner with employers to offer partial wage subsidies for a limited time for new entrants into the energy efficiency workforce
- Include mentorship and networking opportunities as a component of all internship, apprenticeship, pre-apprenticeship, and externship opportunities
- Track and report the number of internships, pre-apprenticeships, apprenticeships, and externships that translate into full-time job offers

MODERATE-INCOME

Improve Qualification Process

1. Revise the income verification process to improve ease of access for moderate-income customers[1]

Enhance Incentives

2. Provide no-cost incentives for weatherization, heating system replacements and appliance replacements to moderate-income customers[2]

   - Increase incentives to support electrification
   - Prioritize whole-building services to incentivize weatherization at the time of heating system replacement

3. Increase and allocate sufficient funding for pre-weatherization barrier mitigation for moderate-income customers

RENTERS and LANDLORDS

Enhance Marketing and Outreach

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

Improve Whole Building Services[3]

4. Collaborate with rental owners on program design
5. Address pre-weatherization barriers
6. Continue and enhance efforts to provide integrated service delivery with one point of contact for owner
7. Enhance incentives for measure bundles and / or for higher savings levels
8. Employ "closers" who get paid to close projects and / or revise Mass Save sales compensation model
9. Provide referral incentives to landlords and tenants who refer their landlords

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[1] Examples the EWG has discussed, but are not yet in agreement on how to proceed, include: Multiple options for income verification, such as automatic qualification in certain EJ communities/geographic areas (community level verification) or using self-verification with audits (household level verification) or other highly simplified verification processes.
Establishing eligibility through documented participation in other state income-qualified programs

[2] The EWG continues to discuss this recommendation and plans to review budget, benefits, and participation data projections for increased incentives for moderate income customers.
[3] Ensure coordination between the low-income and market rate multi-family programs

10. Develop a marketing offer that combines energy efficiency and other building upgrades to attract new program participants

SMALL BUSINESS

Enhance Marketing and Outreach

1. Commit to prioritizing Main Streets programs in EJ communities in addition to and separate from efforts in business parks
2. Develop marketing and outreach strategies for commercial landlords to help commercial renters participate
3. Provide dedicated account managers for a subset of small business customers to allow for more personalized service
   − Consider grouping small business accounts by industry
4. Allow eligible customers to sign up online for turnkey small business audits
5. Expand pool of small business turnkey vendors that employ diverse staff

Prioritize Small Business Turnkey Program

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

Emphasize Co-delivery of Lighting and Non-lighting Measures

10. Bundle lighting and non-lighting measures to deliver comprehensive solutions and deeper savings
11. Deliver more small business weatherization and address pre-weatherization barriers

    − Incorporate non-energy impacts in measure screening

12. Deliver more custom measures and compress the level of effort required to design a custom measure

LANGUAGE ISOLATED POPULATIONS

Understand the Customer Journeys of Language Isolated Populations

1. Create detailed customer journey maps
   − Illustrate individual journeys for each program within IES, Residential, and C&I, and for different customer types, including owners, tenants, property owners and managers
   − Identify all points of contact requiring translation and / or interpretation

- Catalog language assets available within the Mass Save program administrators and contractor network
- Use customer journey maps to establish appropriate expectations among contractors and customers

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

Facilitate Ease of Participation

3. Reduce number of steps required to access offers—participation should be seamless
4. Provide immediate pathways to action
5. Provide direct connections to services (e.g., utility supplies electrician to remedy issue) and energy concierge services
6. Collaborate with community-based organizations serving language isolated communities to standardize and socialize common industry terms

Develop Community-based Connections

7. Enhance connections with community-based groups

- Identify and connect with statewide, regional, and local groups that work within language isolated communities
- Create regular mechanisms for two-way communication
- Listen to community-identified needs
- Identify and work with community leaders, with compensation for their time, experience, and knowledge
- Include community leaders in program planning
- Provide resources on a sustained basis to achieve mutual energy efficiency objectives including financial incentives for lead generation and conversion

8. Leverage community networks to develop necessary cultural competence and build trust with language isolated communities

- Support and use inclusive and multi-lingual media
- Provide feedback on cultural aspects of marketing
- Help with intersectional approaches

Focus on Multi-Lingual Workforce Development

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

Develop Language Access

14. Establish written language access policy, preferably in common across all PAs and vendors, and provide regular training on language access
15. Maintain catalog of language capabilities of workforce, including PA staff and vendors
16. Create mechanisms for easy and equitable sharing of language support, including an MOU across PAs, lead vendors, subcontractors and regularly updated template for PA and vendor access language support

CROSS-CUTTING

Reporting

More frequent and detailed reporting of participation by underserved customer groups as described below.

1. ***Small business***

   - Separate small business from C&I existing building retrofit reporting

   - Expand reporting on small business participation

2. ***Language Isolated Populations***

   - Gather, track, and report customer language preference and language of program participants

3. ***Renters and Landlords***

   - Report renter participation quarterly
   - Report on program participation in small rental buildings (5-25 units)
   - Number of property owners/landlords receiving enhanced insulation incentive
   - Participation, savings, and costs for multifamily program, including # of affected projects and units

4. ***Moderate Income***

   - Provide regular information on barriers to weatherization
   - Number of heating equipment installations for moderate income customers, by type

5. ***Workforce***
   - Track and report on baseline levels, for vendors and employees, by relevant racial and/or cultural categories and at least annually report on progress over time. Include data on those enrolled in training and apprentice programs.

Targeting and Rewarding PA Performance

9. Designate PA budget and savings goals for rental properties, with targets for small buildings (5-25 units)
10. Establish numerical goals for increased participation among underserved customer groups such as moderate-income customers, renters and landlords, language isolated customers, and small businesses

11. Craft performance incentive mechanism that DPU can approve and that will emphasize equity and serving underserved customer groups