- **FULL EQUITY RECOMMENDATIONS WILL BE PRESENTED DURING NOVEMBER EEAC (DEC, CFP, LANGUAGE ACCESS, WFD, SMALL BUSINESS)**

SUMMARY OF STRAW PROPOSALS

Sector	Focus Area	Number	Proposal
Cross Cutting	Affordability	1a.	The PAs must provide bill impacts as part of its draft 2028-2030 plan presented to the EEAC on or before March 31st.
Cross Cutting	Affordability	1b.	The PAs should examine all processes to ensure administrative costs are minimized to the fullest extent possible.
Cross Cutting	Numeric Targets	2.	The PAs will continue to work with the EEAC, Council Consultants and DOER to establish numeric targets and goals for the 2028-2030 term, which will be incorporated into the final plan presented to the Department of Public Utilities.
Cross Cutting	Implementation	3.	The PAs should fully implement all recommendations.
Cross Cutting	Incentives	4.	All incentives for energy efficiency measures should be reviewed to ensure right sizing (including for heat pumps, multi-family and barrier mitigation) to maximize achievement of desired outcomes (e.g. rebate or heat loan for market rate)
Cross Cutting	Data Reporting	5.	In Quarterly Reports, report each initiative's cumulative performance relative to planned values for that initiative. When an initiative is more than 20% below goal, provide monthly updates to the EEAC concerning steps being taken to increase performance and pipeline estimates until the initiative is delivering cumulative savings/benefits of at least 85% of goal for the plan period to date. (This is a cross-cutting recommendation – residential, income eligible, C&I and equity).

Cross Cutting	Equity	6.	Collaborate with MassCEC to enhance its programmatic focus on enhancing Mass Save's workforce diversity; report regularly on progress in achieving impact: • Supplier diversity at every level of supplier engagement with Mass Save • More equal participation across types of diverse suppliers • Returning citizens • End to end Language access services
Cross Cutting	Equity	7.	Continue engagement with EWG on further consideration and/or adoption of fair chance hiring practices
Cross Cutting	Equity	8.	Maintain aspirational 15% supplier diversity goal and continue to report progress
C&I	General Improvements	1.	Adopt a comprehensive, formal continuous improvement approach to all aspects of program implementation to assess and refine programmatic changes. Include regular reporting to the Council on strategies considered and tested, implemented changes, customers reached, quantifiable outcomes that can also be attributed to the changes, associated costs, ant other relevant information.
C&I	General Improvements	2.	Expand and improve data analytics tools and services, particularly for small and mid-sized businesses without dedicated account managers. Tools should be developed to provide to both customers and contractors easy to understand energy insights and actionable guidance to increase participation. Use continuous improvement approach to test and learn whether the data analytics products and services are meeting the needs of customers/contractors and producing energy savings
C&I	General Improvements	3.	Conduct research through customer/vendor surveys, focus groups, and/or industry publications to understand data needs of customers/technical assistance providers and to identify available products and services that may fulfill those needs.
C&I	General Improvements	4.	Conduct research through customer surveys, focus groups, and/or industry publications to understand educational needs at different stages/levels (e.g., web-based interactions with Mass Save, vendor-customer interactions, project proponent interactions with decision makers) and best practice for approaching different target audiences within customer organizations.

C&I	General Improvements	5.	Educate customers on utility rates and alternative rate structures to ensure that they understand drivers behind both rates and bills.
C&I	General Improvements	6.	Differentiate incentives for lighting controls to provide higher incentives for advanced controls strategies (i.e., Luminaire-level/Networked Lighting Controls) that deliver the highest savings.
C&I	Electrification	7.	Continue to provide comprehensive technical assistance to help customers plan for electrification over multiple years.
C&I	Electrification	8.	Plan and budget for growth in C&I electrification activity to reflect growing market activity.
C&I	Electrification	9a.	Collect data on market conditions, measure performance, and customer outcomes to better inform program requirements and design.
C&I	Electrification	9b.	Create a formal market transformation initiative around C&I electrification to give EM&V a framework to better track indicators and assess market progress. Data collection, reporting, and market transformation efforts should address both residential and commercial equipment.
C&I	Electrification	10.	Use customer-specific inputs when calculating anticipated impacts of electrification, where possible, to more accurately predict and communicate project costs and benefits and impacts on energy affordability.
C&I	Electrification	11.	Monitor developments on heat pump rates for C&I customers. If approved, integration into program should include a) customer education about rate and enrollment, b) review and adjustment, if needed, to incentives and c) analysis of bill savings due to new rate relative to other heating fuels.
C&I	Electrification	12.	Where appropriate, coordinate decarbonization strategy with the MassCEC Building Performance Exchange to help customers reduce load, recover wasted energy, and electrify their buildings over time. Integrate Building Performance Exchange best practice recommendations and collaborate with MassCEC, as needed, to improve program decarbonization efforts.
C&I	Equity	13.	Track and report five-year cumulative location participation rates by zip code for microbusinesses and small businesses.

C&I	Equity	14.	Track and report the number of Small Business Turnkey projects that receive enhanced incentives.
C&I	Equity	15.	Track and report account participation, and participation rates, if possible, for renters over time to inform renter and non-renter participation.
C&I	Equity	16.	Maintain enhanced offers for renters and non-profits. Through embedded evaluation, determine whether these approaches are driving participation.
C&I	Equity	17.	Identify which mechanisms may improve participation by C&I renters and property owners.
C&I	Equity	18.	The Program Administrators should determine the effectiveness of the Municipal Energy Manager Grants to include an informed request to the DPU for continued funding, if appropriate. The Program Administrators should update the Council and its Consultants prior to any action.
C&I	Equity	19.	For Community First Partners that identify small businesses as a target segment, develop an approach to better leverage community resources and organizations to communicate Mass Save micro/small business offerings.
C&I	Equity	20.	Explore small business financing opportunities and facilitate connections for customers
C&I	Multifamily and Mixed-Use Buildings	21.	Develop specific multifamily and mixed-use building evaluation studies to identify barriers to participation, key strategies for overcoming those barriers, and provide recommendations on developing a streamlined, dedicated offer.
C&I	Multifamily and Mixed-Use Buildings	22.	Develop a specific offering for mixed-use buildings that consolidates residential and commercial incentives.
C&I	Multifamily and Mixed-Use Buildings	23.	Promote energy-aligned leases, triple-net leases, and other mechanisms to overcome the tenant-landlord incentive split by providing language, guidance, and technical support for property owners. In addition, consider including energy aligned lease provision in Mass Save participation agreements.
Low Income	Budget	1.	Maintain the same overall low-income program as is provided in the current Term, with the same general measure focus, depth of service, and delivery mechanism, with a

			primary emphasis on weatherization.
Low Income	Budget	2.	Target non-incentive costs to achieve total sector incentive spend of 82% (from its current of 78%) by examining cost reduction opportunities from program overhead and administration, quality assurance, and data management.
Low Income	Budget	3.	Provide semi-annual reporting on non-incentive spend.
Low Income	Service Delivery	4.	Update current DEC reporting to include sector specific goals, including goals for weatherization and heat pumps.
Low Income	Service Delivery	5a.	Continue support for strategic electrification by prioritizing heat pump installations for space and water heating in this order: electric resistance, propane/oil, and gas.
Low Income	Service Delivery	5b.	Develop criteria to permit gas customers converting to heat pumps, which also includes customer education on operating costs
Low Income	Service Delivery	5c.	Conduct evaluation of residential (all segments) heat pump delivery costs to assess and recommend implementation strategies to align pricing guidelines to the fullest extent possible.
Low Income	Service Delivery	5d.	Test and implement (if successful) other innovative heat pump technologies (e.g., saddle-style heat pumps) and delivery methods (e.g., DOER lending library, target areas with failing or problematic gas infrastructure).
Low Income	Service Delivery	6.	Establish and implement clear protocols for customer communications throughout the customer journey.
Low Income	Service Delivery	7.	Establish metrics and then set processes to collect data to determine service delivery differences, through geography or participation pathway, and establish mitigation strategies.
Low Income	Service Delivery	8.	Develop an electronic statewide system of program data management using prior evaluation recommendations as a guide to improve consistency and assessment of performance and cost efficiency.

Residential	Weatherization and HEAs	1.	Maintain current weatherization incentives and turnkey delivery model. Explore new opportunities that could contribute to deeper savings and/or may meet customer needs.
Residential	Weatherization and HEAs	2.	Continue to explore new strategies for identifying additional weatherization potential and increasing conversion rates by reviewing past production data, building level data, and community-based insights. Report to the Council strategies identified and those being considered for field deployment.
Residential	Heat Pumps	3.	To simplify customer and contractor experiences and to promote co-adoption of weatherization and electrification, move to a simplified rebate structure that includes two tiers, with one tier offering a higher $ per ton of heating capacity downstream rebate for customers who weatherize with their heat pump installation. Work with HPIN contractors to develop strategic partnerships with IICs to facilitate co-delivery.
Residential	Heat Pumps	4.	Prioritize quality of heat pump installations and customer satisfaction: a. Further refine Heat Pump Installer and Heat Pump Leader Networks participation and education requirements to further improve customer outcomes and program satisfaction b. Further develop QA/QC procedures to improve installation quality and that identifies and remedies any design deficiencies c. Coordinate with MassCEC to ensure that existing contractors and workforce entrants understand heat pump design best practices and sizing principles.
Residential	Heat Pumps	5.	Maintain existing customer supports that help customers navigate electrification decisions.
Residential	Heat Pumps	6a.	Create and publish metrics around these supports to help the Council determine their efficacy in promoting high-efficiency electrification.
Residential	Heat Pumps	6b.	Expand customer facing pricing guidance to increase cost competition in the market.

Residential	Heat Pumps	6c.	Provide customer webinars to educate on the proper operation and maintenance of heat pump systems. Consider producing an educational video that can be distributed for use by program partners, e.g., CFPs or CBOs.
Residential	Moderate Income	7.	Maintain the existing 100% weatherization incentive offers for all residential moderate-income households, with no programmatic requirement changes, e.g. self-attestation statewide, no income verification in DECs.
Residential	Moderate Income	8.	Evaluate whether the moderate-income rebate pathway should be eliminated, i.e., adopt the successful Low-Income program model
Residential	Turnkey Delivery	9.	Continue the Moderate-Income Turnkey Offer with refinements indicated by customer and contractor feedback, EM&V research, and assessment of metrics data
Residential	Turnkey Delivery	9a.	Develop criteria for expanded participation by existing gas heating customers
Residential	Turnkey Delivery	9b.	Develop criteria for partial displacements/waiver of the disconnection requirement
Residential	Turnkey Delivery	9c.	Conduct a quantitative assessment of moderate-income turnkey offer, e.g., administrative costs, quality control etc, as well as a qualitative assessment, e.g., customer satisfaction to determine whether to expand a similar turnkey approach to market rate customers.
Residential	Multifamily	10.	Conduct a comprehensive review of the multi-family offers and adopt modifications to increase participation of multi-family buildings (relative to single family buildings). Considerations of program redesign should include: • Increased electrification outcomes • Expansion of landlord agreement requirement for all multi-family rental properties statewide

Residential	Multifamily	11.	In coordination with the Consultants, improve multifamily reporting and evaluation across all sectors and multi-family categories, e.g., mixed use, mixed income, or both.
Residential	Financing	12.	Continue the newly revised two-tier HEAT Loan offer. Assess impacts to inform further program changes during the 2028-2030 Term.
Residential	Financing	13.	Inform customers of the specific incentive value they are receiving from Mass Save as a result of their HEAT Loan.