



Mixed Income Protocol (MIP) Update

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- MIP Purpose and Goals
- Coordination to Date
- 3-4 Unit Overview
 - Home Energy Assessments
 - Weatherization Coordination
- 5+ Unit Delivery
- Next Steps

Current Service

- All customers are currently being served; receiving 100% weatherization through whole building, mod income, or renter incentives.
- Some units in a building may be served by market rate and others by the income eligible program (IE).

Purpose of the MIP

- The purpose of this protocol is to streamline the service model so it is more seamless for customers and vendors, and to do so in a way that is careful about customer funding and program requirements.

- Seamless delivery of services to customer in buildings with varying program eligibility due to income qualifications (where fewer than 50% of the total building units qualify as income eligible)
- Streamlined customer facing services, with any program allocations occurring on the back end
- Leveraging program contractors participating in both programs for delivery

Coordination to Date



2019

- PAs managing income eligible and Residential Coordinated Delivery (RCD) programs, lead vendors from both programs begin meeting quarterly to lay out process
- Action, Action for Boston Community Development (ABCD), Housing Assistance Corporation (HAC) establish agreements with several RCD vendors to begin receiving MIP referrals

2020

- Working group meets in Q1 and comes closer to consensus on process
- COVID pandemic pause

2021

- Quarterly meetings continue
- Vendors continue to receive MIP referrals and iterate on what final process should look like
- Full protocol agreed on to apply to all vendors

Process Overview



| | Barrier Addressed | 3-4 Units | 5+ Units |
|--|---|---|---|
| Energy Assessment | Minimize number of vendors, amount of time taken from customer, maximize ability to identify efficiency opportunities | RCD vendor does energy assessments for market rate units, CAP agency does assessment on income eligible unit w/in 1 week | RCD vendor assesses whole building, income eligible vendor does in-unit assessments for income eligible customers |
| Weatherization +barriers | Provide most robust incentive the building is eligible for while overcoming differences in scoping, data, tracking, invoicing | Vendor approved in RCD and IE does weatherization scope, 100% incentive for building, up to \$12k barrier mitigation, invoicing shared between programs | RCD vendor does weatherization work. Incentive of at least 75%. |
| HVAC | Maximize ability to identify additional efficiency opportunities for income eligible customers, simple process for condo association/building owner | CAP agency assesses for income eligible customer's HVAC opportunities and installs; remaining units participate through Retail program | RCD vendor does HVAC work |
| Appliances and instant savings measures (ISMs) | Maximize ability to identify additional efficiency opportunities for income eligible customers | CAP agency assesses income eligible unit and installs appliances, ISMs; RCD vendor provides ISMs to market rate units | Income eligible vendor unit and installs appliances, ISMs; RCD vendor provides ISMs to market rate units |
| Quality Control (QC) | Minimize time taken from customer, maximize accuracy | RCD and income eligible QC vendor (typically this is the same vendor) do simultaneous QC | RCD and income eligible QC vendor (typically this is the same vendor) do simultaneous QC |

3-4 Unit Process Overview



- Multi-unit buildings with 50% income eligible tenants are served entirely by the Community Action Program (CAP) agency
- For 3 and 4-unit buildings where only one customer is income eligible, the PAs, LEAN partners, and lead vendors (LVs) have discussed the following
 - Home Energy Assessments (HEAs) are provided within RCD, and appliance management program (AMP), heating assessment by CAP Agencies
 - Weatherization Contractors must sign on to participate in both IE and RCD

3-4 Home Energy Assessments (HEA)



1. RCD vendor (Lead Vendor or Home Performance Contractor) provides the HEA on all units in the building
 - If it is identified that there is one customer on the discount rate code, this will trigger a MIP referral.
 - Resulting weatherization work scopes are shared with the income eligible lead vendor and CAP agency.
 - RCD vendor refers market rate units to HVAC contractor list for any HVAC opportunities

2. The local CAP agency follows up with an AMP and heating system assessment for the income eligible customer to provide them with any eligible appliances, heating system, and/or instant savings measures they qualify for.
 - The goal is to have this assessment completed within the same week as the weatherization installation, or as soon as possible based on the customer's calendar.

3-4 Weatherization Coordination



3. If pre-wx barriers exist, the customer will be informed of the remediation incentive of up to \$7,000.
 - If additional funding is needed, the RCD vendor will coordinate with the IE LV and CAP for an additional \$5,000, for a total of **up to \$12,000 towards remediation.**
4. Weatherization work is completed for the whole building by that same RCD vendor.
 - The building receives a **100% weatherization incentive.**
5. The CAP and the RCD vendor complete their quality control (QC) check at the same time, at which point the market rate units receive their ISMs.

5+ Unit Delivery



Process currently exists to serve customers in 5+ buildings

- If the building is 50%+ Income Eligible, the CAP agency serves the entire building
 - If the building is less than 50% Income Eligible, the income qualifying residents are served by the CAP agencies, and all other customers served via Residential Coordinated Delivery
1. Whenever possible, a vendor will be assigned to the job who can work in both RCD and IE programs; in all other cases coordination will be between RCD vendor and IE lead vendor
 2. Income Eligible customers receive an AMP assessment for all in-unit measures, within 3 weeks of initial whole-building assessment
 3. RCD vendor provides all common area/whole building upgrades; IE vendor provides all in-unit upgrades for IE units
 4. One point of contact provided to customers via RCD vendor to streamline the process and avoid confusion

Next Steps



- Finalized processes for 1-4 and 5+ units to be cascaded to all vendor and PA staff.
- PA's and LEAN intend to implement enhancements beginning in 2022.