

EEAC Equity Working Group Summary to EEAC on Moderate-Income, Renter and Landlord, Small Business, and Community Partnerships Recommendations

January 2021

Background

On May 20, 2020, the [EEAC created the Equity Working Group \(EWG\)](#) to identify and recommend priority actions, plans, and partnerships to increase participation among moderate-income customers, renters and landlords, customers with limited English proficiency, and small businesses as identified in the non-participant studies completed earlier this year.¹ The EWG strives to develop just and equitable solutions that are centered in the communities that have been historically underserved by the existing Mass Save programs.

This document will focus on providing a summary report of the work undertaken by the EWG to develop recommendations for the 2022-2024 Statewide Energy Efficiency Plan. Recommendations on workforce development were presented during workshop #4 on December 15, 2020.

Mission/Objective

The mission of the EWG was established in the EEAC's commissioning of the group and then further refined in the EWG: Framework document. The EWG is to identify and recommend priority actions, plans, and partnerships, to increase participation among these customer groups to inform the 2022-2024 Three-Year Energy Efficiency Plan,² The EWG will strive to develop just and equitable solutions that center on the communities that have been underserved by existing Mass Save programs. The working group will prioritize developing data-driven recommendations when feasible that address the needs of renters, moderate-income customers, customers with limited English language proficiency, and small businesses. In effort to develop just and equitable solutions, the EWG will solicit meaningful participation and engagement from relevant organizations that represent these underserved communities.

The EWG will use these deliberations to inform a vision for equity within the Mass Save® programs and identify specific and measurable, steps toward achieving that vision. As a starting point, the EWG will use the Metropolitan Area Planning Council's State of Equity Policy Agenda³ to define equity:

Equity is the condition of fair and just inclusion into a society. Equity will exist when those who have been most marginalized have equal access to opportunities, power, participation, and resources and all have avenues to safe, healthy, productive, and

¹ [Residential Non-Participant Customer Profile Study](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); [Commercial and Industrial Small Business Non-Participant Customer Profile Study](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).

² <http://ma-eeac.org/wordpress/wp-content/uploads/Final-Draft-EEAC-Equity-Working-Group-Doc-for-Vote-5-20-20.pdf>.

³ MAPC State of Equity for Metro Boston Policy Agenda <https://equityagenda.mapc.org/>.

fulfilling lives. It 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.

Equity Working Group Process and Goals

A full list of EWG members can be found in Appendix A. The EWG met every other week through summer and fall, and meetings are structured around a specific topic selected by EWG members. Before each topic specific meeting, the EWG co-chairs along with the DOER and the EEAC consultant team meet to prepare for the upcoming working group meeting. During this planning meeting the co-chairs will begin to outline a meeting agenda. Meeting agendas are based on accomplishing the goals identified by the EWG in its Framework document. These goals include identifying recommendations that accomplish the following:

- ◆ Support in identifying institutional barriers, practices, and policies to increase lower to moderate-income customers program participation rates;
- ◆ Increase participation and savings from renters, moderate-income customers, customers with limited English proficiency, and small businesses;
- ◆ Increase the racial/ethnic, gender, and language diversity of the energy efficiency workforce via workforce development efforts;
- ◆ Increase participation and savings in municipalities identified through the residential and commercial non-participant studies; and
- ◆ Improve coordination and communication between external stakeholders, EEAC members, and the Program Administrators (PAs) with regard to equity.

Stakeholder Engagement and Themes

In an effort to include stakeholders throughout the process, EWG meetings have been structured to include topic-based stakeholder input sessions. These sessions have been structured as facilitated feedback sessions where stakeholders respond to various open-ended questions about the selected topic. To date the EWG has consulted with 58 stakeholders on the topics identified by the working group. A list of the stakeholder organizations participating is included as Appendix B. Below is a brief description of common themes that emerged during discussions with stakeholders and EWG members.

Common themes that emerged during the discussion on **moderate-income** included:

- ◆ Support for enhanced incentives for moderate-income customers, including current offer for no-cost weatherization measures.
- ◆ The current income verification process could be streamlined and improved to reduce barriers and increase participation.
- ◆ Current moderate-income rebates, incentives, and financing are not affordable or easily accessible to moderate-income customers.
- ◆ Customers living in metro areas with a high-cost of living are unable to qualify for the current moderate-income offer.

- ◆ Pre-weatherization barriers often prevent moderate-income customers from achieving deeper savings.

Common themes that emerged during the discussion on **renters and landlords** included:

- ◆ Landlords and building owners are the key decision makers regarding changes to the building. Focusing outreach on decision makers would help increase participation.
- ◆ Existing renter initiatives need to be improved to adequately provide whole building services.
- ◆ Landlords and building owners can benefit from additional guidance and “hand holding” when accessing programs.
- ◆ Pre-weatherization barriers often prevent renters and landlords from achieving deeper savings.

Common themes that emerged during the discussion on **small businesses** included:

- ◆ Marketing and outreach should include a concerted focus on main streets rather than office parks.
- ◆ Technical jargon can deter customers from participating.
- ◆ Overreliance on “upstream” programs limits deeper savings for small businesses.
- ◆ Co-delivery of lighting and non-lighting measures would allow small businesses to more holistically evaluate the energy efficiency opportunities available that enable deeper savings.

Common themes that emerged during the discussion on **limited English proficiency (LEP)** included:

- ◆ It is difficult to assess language access needs without complete customer journey profiles.
- ◆ Lack of standardization of commonly translated energy efficiency terms creates confusion for customers.
- ◆ Community-based organizations are often viewed as trusted resources with strong ties to community members.
- ◆ A multi-lingual energy efficiency workforce is needed to effectively reach LEP customers.

Common themes that emerged during the discussion on **community partnerships** included:

- ◆ Municipal partnership is a good first step to engaging municipalities and community organizations.
- ◆ Community partners need access to data to help them effectively target potential program participants.
- ◆ Multi-year commitments, goals, and investment are necessary for community partners to build resources and effectively deliver programs.
- ◆ Programs should focus more directly with community organizations and providing resources to those organizations.

Overview of EWG Recommendations

In effort to capture more detailed feedback and ensure all were provided ways to comment with which they are comfortable, a survey on provisional recommendations was developed and sent to EWG members. Based on this, the EWG makes the following recommendations. The recommendations below are presented with cross-cutting recommendations first, then by customer group/topic area. Cross-

cutting recommendations were those that came up repeatedly across topics areas, and are broadly related to the need for more regular and granular reporting and the development of performance incentives. For those who wish to view the recommendations as they were developed thematically during EWG meetings, please see Appendix C. Appendix D provides a quick reference guide to commonly used acronyms.

CROSS-CUTTING

Reporting

- ▶ More frequent reporting of participation by rental properties
- ▶ More detailed reporting related to rental properties
- ▶ Return to reporting methods of 2016-2018
 - No merging small business with C&I existing building retrofit
 - More detailed reporting on small business participation
- ▶ Establish written language access policy, preferably in common across all PAs and vendors, and provide regular training on language access
- ▶ Gather and track customer language preference
- ▶ Track and report language by program participant
- ▶ Maintain catalog of language capabilities of workforce, including PA staff and vendors
- ▶ Create mechanisms for easy and equitable sharing of language support
 - MOU across PAs, lead vendors, subcontractors
 - Regularly updated template for PA and vendor access language support
- ▶ Track and regularly report key indicators of workforce diversity
 - Disadvantaged Business Enterprise vendor participation (in # and in \$)
 - # of women and BIPOCs employed by PAs and other firms providing services to Mass Save

Rewarding PA Performance

- ▶ Designate PA budget and savings goals for rental properties, with targets for small buildings
- ▶ Craft performance incentive mechanism that DPU can approve
- ▶ Build equity goals and metrics into small business turnkey vendor contracts at time of renewals
 - ▶ Serving EJ communities
 - ▶ Supplier diversity goals for prime contractors

- ▶ Establish goal for increased participation by LEP
- ▶ Establish goals and benchmarks to increase diversity of workforce in 2022-2024
 - Set numerical targets to increase the following: MBE and WBE participation in the trade ally network, number of projects completed by MBEs and WBEs, and number of contracts executed with MBEs and WBEs
 - Set goals for the numbers of women and BIPOCs employed by PAs and other firms directly contracted with Mass Save

MODERATE-INCOME

Expand Eligibility

- ▶ Expand moderate-income eligibility to include customers from 61-80% SMI or AMI, whichever is greater

Improve Qualification Process

- ▶ Revise the income verification process to improve ease of access for moderate-income customers
 - Examples include offering:
 - Multiple options for income verification, such as automatic qualification in certain EJ communities/geographic areas or using the California model for fuel assistance (random plus targeted verification)
 - Establishing eligibility through documented participation in other state income-qualified programs

Enhance Incentives

- ▶ Provide no-cost incentives for weatherization, heating system replacements, and appliances to moderate-income customers
- ▶ Allocate funding for pre-weatherization barrier mitigation for moderate-income customers

RENTERS and LANDLORDS⁴

Enhance Marketing and Outreach

- ▶ Target municipalities with high numbers of rentals
- ▶ Use multiple strategies to reach rental property owners and residents

⁴ The EWG also discussed two recommendations outside of Mass Save and EEAC purview: disclosure to renters of utility costs and Mass Save assessments, and minimum energy performance standards for rental properties.

- ▶ Develop compelling case for participation by developing case studies when new program offerings become available
- ▶ Develop alternative sales and / or delivery models for rental property segment (e.g., landlord association, other 3d party)

Improve Whole Building Services

- ▶ Collaborate with rental owners on program design
- ▶ Address pre-weatherization barriers
- ▶ Continue and enhance efforts to provide integrated service delivery with one point of contact for owner
- ▶ Enhance incentives for measure bundles and / or for higher savings levels
- ▶ Employ “closers” who get paid to close comprehensive projects and / or revise Mass Save sales compensation model
- ▶ Provide referral incentives to landlords
- ▶ Develop a marketing offer that combines energy efficiency and other related improvements to attract new program participants

SMALL BUSINESS

Enhance Marketing and Outreach

- ▶ Include small business Main Streets in efforts to serve EJ communities with reduced focus on business parks
- ▶ Develop marketing and outreach strategies for commercial landlords to help commercial renters participate
- ▶ Bring back dedicated account managers for small business customers
- ▶ Allow eligible customers to sign up for turnkey small business audits online
- ▶ Expand pool of small business turnkey vendors that employ diverse staff

Prioritize Small Business Turnkey Program

- ▶ Improve incentives and financing and standardize offering of turnkey services across PAs
- ▶ Reduce reliance on upstream programs for small business
- ▶ Enhance opportunities for deeper savings for underserved customers
- ▶ Provide “handholding” services to guide customers through audit and installation

Emphasize Co-delivery of Lighting and Non-lighting Measures

- ▶ Bundle lighting and non-lighting measures to deliver comprehensive solutions and deeper savings
- ▶ Deliver more small business weatherization and address pre-weatherization barriers
 - Incorporate non-energy impacts in measure screening
- ▶ Deliver more custom measures and compress the level of effort required to design a custom measure

LIMITED ENGLISH PROFICIENCY (LEP)

Understand LEP Customer Journeys

- ▶ 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 full network
 - Use customer journey maps to establish appropriate expectations among contractors and customers
- ▶ Identify gaps in resources and develop plan to bridge them through program outreach, design, delivery, and workforce development efforts

Facilitate Ease of Participation

- ▶ Reduce number of steps required to access offers—participation should be seamless
- ▶ Provide immediate pathways to action
- ▶ Provide direct connections to services (e.g., utility supplies electrician to remedy issue) and energy concierge services
- ▶ Standardize and socialize common industry terms

Develop Community-based Connections

- ▶ Enhance connections with community-based groups
 - Identify and connect with statewide, regional, and local groups that work within non-English 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
- ▶ Leverage community networks to develop necessary cultural competence and build trust with LEP
 - Support and use ethnic / non-English media
 - Provide feedback on cultural aspects of marketing
 - Help with intersectional approaches

Focus on LEP Workforce Development

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

WORKFORCE DEVELOPMENT (note these workforce recommendations will not be discussed at the workshop on 1/12/21 workshop)

Increase the Diversity of the Workforce Supporting Mass Save

- ▶ 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
 - 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
- ▶ 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
- ▶ 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
- ▶ Create 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
- ▶ 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

- ▶ 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
- ▶ 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

PARTNERSHIPS

Enhance Community Partnerships

- ▶ 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 internal capacity building
- ▶ Tie incentives specifically to increases in participation by renters, moderate income customers, and LEP customers, which is not currently the case for the Municipal Partnership Program
- ▶ 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
- ▶ Create goal-setting and evaluation mechanisms that include partners
- ▶ Increase the number of participating municipalities and allow municipalities to submit multi-year applications
- ▶ 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 CBOs as they navigate data
- ▶ Give program partners more flexibility to develop marketing materials that will resonate with their community

Develop Additional Pathways for Community Partnerships

- ▶ Expand approach to partnerships to include entities other than municipalities
 - Community-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
- ▶ Create goal-setting and evaluation mechanisms that include partners
- ▶ Ensure partnerships go beyond just outreach
 - E.g., partners could serve as savings aggregators, project openers or closers, implementers

Invest in Community-based Partnerships

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

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

Prioritize Underserved Communities

- ▶ 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

Next Steps

Following the January workshop, the EWG will continue to meet on a regular basis. During this next phase EWG members will continue to refine existing recommendations in effort to provide more detailed recommendations. Topics that the EWG will continue to examine include:

- ◆ Moderate Income incentives, program delivery, and additional detailed recommendation on income verification process;
- ◆ Detailed recommendations for community-based program;
- ◆ Developing Equity Goals for 2022-2024;
- ◆ Tracking and Reporting across Equity Metrics; and
- ◆ Measuring and Rewarding PA Performance, including the performance incentive.

Appendix A –Equity Working Group Members

Name	Position
Maggie McCarey	DOER
Alexis Washburn	DOER
Cindy Arcate	Representing Massachusetts Non-Profits
Charlie Harak	Representing Organized Labor
Cammy Peterson (Chair)	Representing Commonwealth Cities & Towns
Mary Wambui (Chair)	Representing Residential Consumers
Jo Ann Bodemer	AGO
Amanda Formica	National Grid
Ruth Georges	Eversource
Stephanie Terach	Liberty Utilities
Margaret Downey	Cape Light Compact
Brian Beote	Action Inc.
James Collins	ABCD
Elizabeth Chant	EEAC Consultant
Margie Lynch	EEAC Consultant
Eugenia Gibbons	Healthcare Without Harm/Green Justice Coalition
Caitlin Peale Sloan	Conservation Law Foundation
Cindy Luppi	Clean Water Action/Green Justice Coalition

Appendix B –Participating Stakeholders

Name	Organization
Adam Parker	Emerald Cities Boston
Aimee Powelka	MassEnergize and Sustainable Framingham
Amanda Converse	Love Live Local
Andrea Nyamkye	Neighbor to Neighbor
Bill Bullock	Small Business Expert - Eversource
Carolyn Royce	Jamaica Plain Neighborhood Council
Catherine Ratte	Pioneer Valley Planning Commission
Claire Müller	Unitarian Universalist Mass Action
Cynthia Loesch-Johnson	Codman Square Neighborhood Council
Daryl Wright	Emerald Cities Boston
Doug Quatrochi	Mass Landlords Association
Ed Connelly	New Ecology
Edward Hsieh	Asian American Civic Association
Elizabeth Kennedy Cleveland	MassCEC
Elizabeth Youngblood	MassCEC
Emily Jones	LISC
Fahad Khan	Springfield Technical Community College
Fatima Ali-Salaam	Greater Mattapan Neighborhood Council
Gabe Shapiro	All in Energy
Greg King	TSK Energy Solutions
Jane Winn	Berkshire Environmental Action Team
Jennifer Vivarwong	City of Boston Department of Language and Communication
Jessica Bergman	Chambers for Innovation and Clean Energy
Josh Kriesberg	MassCEC
Joy Gary	Greater Mattapan Neighborhood Council
Katherine Moses	City of Lowell
Kevin Cote	ClearResult
Kevin McCaskil	Madison Park Vocational Technical High School
Kevin Rainsford	Jamaica Plain Neighborhood Council
Kristen Patneaude	Power Options
Latrelle Pinkney-Chase	Madison Park Vocational Technical High School
Lindsay Henderson	Small Business Expert - CLC
Lisa Dobbs	MassCEC
Lorenzo Macaluso	Center for EcoTechnology
Maria Belen-Power	GreenRoots Chelsea/Green Justice Coalition
Martha Grover	City of Melrose
Matt Rusteika	Acadia Center

Meg Howard	MassCEC
Neal Duffy	DOER Green Communities Division
Noelle Pina	Orleans Chamber of Commerce
Pete Smith	Newton Needham Chamber of Commerce
Rose Wessel	Berkshire Environmental Action Team
Rouwenna Altemose	All in Energy
Saba Ijadi	Fairmount Indigo CDC Collaborative
Sabrina Davis	Coalition for Social Justice
Sarah Dooling	Mass Climate Action Network
Shalanda Baker	Northeastern University
Shawn Luz	City of Framingham
Sofia Owen	Alternatives for Community and Environment
Staci Rubin	Conservation Law Foundation
Stephan Wollenburg	National Grid
Steve Cowell	E4 the Future
Susan Almono	Merrimack Valley Interfaith Team
Susan Olshuff	Ener-g-save
Susie Potter	Potter Ruiz Advertising
Tamika Jacques	MassCEC
Todd	Deaf Inc
Vin Graziano	RISE Engineering

Appendix C – Equity Working Group Recommendations Presented Thematically

DESIGN PROGRAMS WITH COMMUNITY PARTNERS

- ▶ Enhance connections with community-based groups
 - Identify and connect with statewide, regional, and local groups that work within non-English 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
- ▶ Create goal-setting and evaluation mechanisms that include partners
- ▶ Ensure partnerships go beyond just outreach
 - E.g., partners could serve as savings aggregators, project openers or closers, implementers
- ▶ Listen to community-identified needs
- ▶ Include leaders in goal-setting and program planning
- ▶ Identify and work with community leaders, with compensation for their time, experience, and knowledge
- ▶ Provide resources on a sustained basis to achieve mutual energy efficiency objectives
- ▶ Create regular mechanisms for two-way communication

IMPROVE ACCESS THROUGH PARTNERSHIPS

- ▶ Recruit through community-based organizations
- ▶ 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
- ▶ 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 internal capacity building

- ▶ Tie incentives specifically to increases in participation by renters, moderate income customers, and LEP customers, which is not currently the case for the Municipal Partnership Program
- ▶ 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
- ▶ Increase the number of participating municipalities and allow municipalities to submit multi-year applications
- ▶ Give program partners more flexibility to develop marketing materials that will resonate with their community
- ▶ Expand approach to partnerships to include entities other than municipalities
 - Community-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
- ▶ Identify and connect with local groups that work within underserved communities
- ▶ 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

SIMPLIFY SERVICE

- ▶ Revise the income verification process to improve ease of access for moderate-income customers
 - Examples include offering:
 - ▶ Multiple options for income verification, such as automatic qualification in certain EJ communities/geographic areas or using the California model for fuel assistance (random plus targeted verification)
 - ▶ Establishing eligibility through documented participation in other state income-qualified programs
- ▶ Continue and enhance efforts to provide integrated service delivery with one point of contact for owner
- ▶ Allow eligible customers to sign up for turnkey small business audits online

- ▶ Expand pool of small business turnkey vendors that employ diverse staff
- ▶ Provide “handholding” services to guide customers through audit and installation
- ▶ Deliver more custom measures and compress the level of effort required to design a custom measure
- ▶ Reduce number of steps required to access offers—participation should be seamless
- ▶ Provide immediate pathways to action
- ▶ Provide direct connections to services (e.g., utility supplies electrician to remedy issue) and energy concierge services
- ▶ Standardize and socialize common industry terms
- ▶ Leverage community networks to develop necessary cultural competence and build trust with LEP
 - Support and use ethnic / non-English media
 - Provide feedback on cultural aspects of marketing
 - Help with intersectional approaches
- ▶ Establish written language access policy, preferably in common across all PAs and vendors, and provide regular training on language access
- ▶ Gather and track customer language preference

IMPROVE MARKETING & OUTREACH

- ▶ Target municipalities with high numbers of rentals
- ▶ Use multiple strategies to reach rental property owners and residents
- ▶ Develop compelling case for participation by developing case studies when new program offerings become available
- ▶ Develop alternative sales and / or delivery models for rental property segment (e.g., landlord association, other 3d party)
- ▶ Develop a marketing offer that combines energy efficiency and other related improvements to attract new program participants
- ▶ Include small business Main Streets in efforts to serve EJ communities with reduced focus on business parks
- ▶ Develop marketing and outreach strategies for commercial landlords to help commercial renters participate
- ▶ Bring back dedicated account managers for small business customers

IMPROVE REPORTING TO SUPPORT ACHIEVEMENT OF EQUITY GOALS

- ▶ More frequent reporting of participation by rental properties
- ▶ More detailed reporting related to rental properties
- ▶ Return to reporting methods of 2016-2018
 - No merging small business with C&I existing building retrofit
 - More detailed reporting on small business participation
- ▶ Track and report language by program participant
- ▶ Maintain catalog of language capabilities of workforce, including PA staff and vendors
- ▶ Track and regularly report key indicators of workforce diversity
 - Disadvantaged Business Enterprise vendor participation (in # and in \$)
 - # of women and BIPOCs employed by PAs and other firms providing services to Mass Save
- ▶ Create 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
- ▶ 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 CBOs as they navigate data

DEFINE GOALS; MEASURE & REWARD PERFORMANCE

- ▶ Designate PA budget and savings goals for rental properties, with targets for small buildings
- ▶ Craft performance incentive mechanism that DPU can approve
- ▶ Build equity goals and metrics into small business turnkey vendor contracts at time of renewals
 - Serving EJ communities
 - Supplier diversity goals for prime contractors

- ▶ Establish goal for increased participation by LEP
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 - Set numerical targets to increase the following: MBE and WBE participation in the trade ally network, number of projects completed by MBEs and WBEs, and number of contracts executed with MBEs and WBEs
 - Set goals for the numbers of women and BIPOCs employed by PAs and other firms directly contracted with Mass Save

MODERATE INCOME

- ▶ Expand moderate-income eligibility to include customers from 61-80% SMI or AMI, whichever is greater
- ▶ Provide no-cost incentives for weatherization, heating system replacements, and appliances to moderate-income customers
- ▶ Allocate funding for pre-weatherization barrier mitigation for moderate-income customers

RENTERS and LANDLORDS⁵

- ▶ Collaborate with rental owners on program design
- ▶ Address pre-weatherization barriers
- ▶ Enhance incentives for measure bundles and / or for higher savings levels
- ▶ Employ “closers” who get paid to close comprehensive projects and / or revise Mass Save sales compensation model
- ▶ Provide referral incentives to landlords

SMALL BUSINESS

- ▶ Improve incentives and financing and standardize offering of turnkey services across PAs
- ▶ Reduce reliance on upstream programs for small business
- ▶ Enhance opportunities for deeper savings for underserved customers
- ▶ Bundle lighting and non-lighting measures to deliver comprehensive solutions and deeper savings
- ▶ Deliver more small business weatherization and address pre-weatherization barriers
 - Incorporate non-energy impacts in measure screening

LIMITED ENGLISH PROFICIENCY

⁵ The EWG also discussed two recommendations outside of Mass Save and EEAC purview: disclosure to renters of utility costs and Mass Save assessments, and minimum energy performance standards for rental properties.

- ▶ 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 full network
 - Use customer journey maps to establish appropriate expectations among contractors and customers
- ▶ Identify gaps in resources and develop plan to bridge them through program outreach, design, delivery, and workforce development efforts
- ▶ Address gaps identified in language cataloging
- ▶ Focus recruitment efforts to develop multilingual workforce for all levels
- ▶ Create career ladders for multilingual staff; include pay differentials for language / cultural experience
- ▶ Adapt to cultural differences within language groups, based on ethnicity, age, etc.
- ▶ Create mechanisms for easy and equitable sharing of language support
 - MOU across PAs, lead vendors, subcontractors
 - Regularly updated template for PA and vendor access language support

WORKFORCE DEVELOPMENT

- ▶ 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
 - 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
 - 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
 - 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
- ▶ 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
- ▶ 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

Appendix D – List of Commonly Used Acronyms

Acronym	Term
EWG	Equity Working Group
DBE	Disadvantaged Business Enterprise
MBE	Minority Business Enterprise
WBE	Women Business Enterprise
VBE	Veteran Business Enterprise
LGBTBE	Lesbian, Gay, Bisexual, and Transgender Business Enterprises
DOBE	Disability-Owned Business Enterprise
BIPOC	Black, Indigenous, and People of Color
RFI	Request for Information
RFP	Request for Proposal
RFQ	Request for Quotation
HERS	Home Energy Rating System
HVAC + R	Heating, Ventilation, Air Conditioning, and Refrigeration
BOC	Building Operator Certification
BAS	Building Automation Systems