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October 28, 2013

BY EMAIL AND U.S. MAIL

Lauren Farrell
Executive Office of Energy and Environmental Affairs
Energy Policy Review Commission
100 Cambridge Street, 9th Floor
Boston, MA 02114

Re: Comments of the Energy Efficiency Program Administrators to the
Energy Policy Review Commission

Dear Secretary Marini:

On behalf of Bay State Gas Company d/b/a Columbia Gas of Massachusetts, The Berkshire Gas Company, Blackstone Gas Company, Boston Gas Company and Colonial Gas Company each d/b/a National Grid, Fitchburg Gas and Electric Light Company d/b/a Unitil, NSTAR Gas and Electric Company, New England Gas Company, Cape Light Compact, Massachusetts Electric Company and Nantucket Electric Company each d/b/a National Grid, and Western Massachusetts Electric Company (collectively "Program Administrators" or "PAs"), pursuant to Section 41(c)(1) of An Act relative to competitively priced electricity in the Commonwealth, S. 2395 at § 41 (2012) (the "2012 Energy Act"), please find comments of the Program Administrators to the Energy Policy Review Commission.

Please do not hesitate to contact me with any questions you may have relating to these comments.

Very truly yours,



Jodi K. Hanover

Enclosures

cc: Program Administrator Counsel

**JOINT COMMENTS OF THE MASSACHUSETTS ENERGY EFFICIENCY PROGRAM
ADMINISTRATORS TO THE ENERGY POLICY REVIEW COMMISSION**

Bay State Gas Company d/b/a Columbia Gas of Massachusetts (“CMA”), The Berkshire Gas Company (“Berkshire”), Blackstone Gas Company (“Blackstone”), Boston Gas Company and Colonial Gas Company each d/b/a National Grid (“National Grid”), Fitchburg Gas and Electric Light Company d/b/a Unitil (“Unitil”), NSTAR Gas and Electric Company (“NSTAR”), New England Gas Company (“New England”), Cape Light Compact (“Compact”)¹, Massachusetts Electric Company and Nantucket Electric Company each d/b/a National Grid (“National Grid”), and Western Massachusetts Electric Company (“WMECO”, together with NSTAR, “NU”) (collectively “Program Administrators” or “PAs”) hereby submit the following comments to the Energy Policy Review Commission (“EPRC”), pursuant to Section 41(c)(1) of An Act relative to competitively priced electricity in the Commonwealth, S. 2395 at § 41 (2012) (the “2012 Energy Act”).

Promoting Energy Efficiency in the Commonwealth

The Program Administrators acknowledge and appreciate the work of the EPRC in performing a broad review of energy policies in Massachusetts. With respect to the EPRC’s review of energy efficiency, the Program Administrators wish to express their support for the current regulatory framework for energy efficiency, which has resulted in nation-leading, award-winning programs with savings goals and delivery that are unprecedented. The current energy efficiency framework requires the development of three-year plans that provide for cost-effective and sustainable energy efficiency efforts, and account for customer bill impacts and expected costs and benefits associated with energy efficiency programs. The Program Administrators develop these plans in a collaborative, transparent, and year-long process with the Energy Efficiency Advisory Council (“EEAC”), which is comprised of a diverse group of stakeholders, the EEAC’s consultants, and other interested stakeholders, and then submit them for extensive review by the Department of Public Utilities (“DPU”), an agency subject to G.L. c. 30A. In addition, the current energy efficiency framework provides for regular, publicly available reporting by the Program Administrators to the DPU and the EEAC. The EEAC holds monthly

¹ In addition to Investor Owned Utilities, the Green Communities Act also applies to the Compact as a municipal aggregator and provider of energy efficiency programs in coordination with Massachusetts utilities.

meetings to monitor and advise the implementation of three-year plans. The level of review, collaboration and accountability of the current regulatory framework ensures that customers are receiving beneficial and cost-effective services. Consideration of any modification should take into account the success of the current framework and avoid additional or redundant reporting that would result in unnecessary customer costs and added administrative burdens on the PAs that do not lead to increased savings.²

Pursuant to the mandates of the Green Communities Act,³ the Program Administrators develop three-year energy efficiency plans to acquire all cost-effective energy efficiency through a sustained and integrated statewide energy efficiency effort. In these plans, the PAs set aggressive, sustainable goals that (1) capture all available cost-effective energy efficiency, (2) maximize net economic benefits, (3) achieve energy, capacity, climate and environmental goals, and (4) consider both short-term customer bill impacts and longer-term benefits expected from proposed efforts. These plans include comprehensive programming, large-scale marketing and education campaigns, and extensive Evaluation, Monitoring, and Verification (“EM&V”), all resulting in significant energy savings to customers in the Commonwealth.

Pursuant to law, the Program Administrators’ energy efficiency plans and programs are extensively reviewed by the DPU and EEAC (which was established as an advisory body by the Green Communities Act). Final approval of the plans follows not only review and input by the EEAC, but also a formal investigation by the DPU. Given this amount of review, no additional oversight or review processes are necessary. Both prior to and particularly following the passage of the Green Communities Act, there has been, and continues to be, extensive review of the three-year plans with input by multiple stakeholders, including the EEAC, the DPU, the Department of Energy Resources (“DOER”), the Office of the Attorney General (“AG”), and many other interested parties.⁴

² For a discussion of current DPU efforts to reduce the administrative burdens and cost to customers associated with the delivery of energy efficiency programs, please see the Comments of the Compact filed with the EPRC on May 17, 2013.

³ An Act Relative to Green Communities, Acts of 2008, chapter 169, section 11, codified at G.L. c. 25 §§ 19, 21-22.

⁴ For additional discussion of this extensive oversight process, please see the Comments of the Compact filed with the EPRC on May 17, 2013.

The DPU, a regulatory agency statutorily responsible for extensive oversight of the Program Administrators in Massachusetts, is responsible for final approval of energy efficiency plans, after a comprehensive process that includes standards for filing, discovery, evidentiary hearings, briefing and careful and extensive analysis informed by the DPU's technical expertise. For example, during the 2013-2015 three-year plan review process, each Program Administrator responded to over 150 information and record requests and participated in nine days of evidentiary hearings at the DPU.

The development of the energy efficiency plans is a collaborative effort among the Program Administrators, the EEAC and its consultants, DOER, the Attorney General, and other interested stakeholders who work together to refine the plans. For example, as part of the development of the 2013-2015 statewide energy efficiency plan, the Program Administrators participated in 11 EEAC meetings and four EEAC-organized webinars, at which the Program Administrators presented on a variety of topics, and 17 EEAC Executive Committee and subcommittee meetings. In addition, the PAs convened numerous working groups, held one-on-one meetings with stakeholders to address best practices and issues related to the development of the plan, and held a well-attended Appreciative Inquiry Summit. The Program Administrators developed and filed with the EEAC three draft versions of the plan, and remained actively engaged in discussions with the EEAC and the EEAC's consultants in an effort to obtain the full support of the EEAC.

The EEAC holds monthly, publicly-noticed open meetings, with regular presentations from the Program Administrators and the EEAC's consultants as well as public comment. The PAs share best practices and identify new and innovative strategies through their many working groups and management committees, including the Residential Management Committee, the Commercial & Industrial Management Committee, the Evaluation Management Committee, Low-Income Best Practices, the Massachusetts Technical Advisory Committee, and the Contractor Best Practices Group.

Additionally, each Program Administrator files publicly available data tables, including measure level benefit-cost screening models, with each plan and report submitted to the DPU,

and the PAs submit quarterly reports and monthly data dashboards to the EEAC, along with many other *ad hoc* data requests.⁵ Given the extensive amount of oversight, review, and available data, any new or additional oversight of energy efficiency programs would be unnecessary and would likely be counterproductive.

With respect to costs and benefits, as set forth in the Green Communities Act, the Program Administrators are required to seek all available cost-effective energy efficiency. In other words, PAs must seek all cost-effective opportunities (with due consideration of customer bill impacts), and all PA programs must be cost-effective. The Program Administrators determine cost-effectiveness using the Total Resource Cost Test, as prescribed by the DPU in §3.4.3 of the Revised Energy Efficiency Guidelines, D.P.U. 11-120-A, Phase II (2013). In Revised Energy Efficiency Guidelines, D.P.U. 08-50-A (2009), the DPU performed a detailed and extensive review of cost-effectiveness tests and stated: “the Department reaffirms that the Total Resource Cost test -- which includes all costs and benefits associated with the energy system, as well as all costs and benefits associated with program participants -- continues to be the most appropriate test to use in analyzing energy efficiency cost-effectiveness, and is consistent with the requirements of the Green Communities Act.” D.P.U. 08-50-A at 14. The Program Administrators continue to comply with all statutes and DPU Orders regarding cost-effectiveness for energy efficiency.

Position of Tom Regh, Progressive Energy Services

The EPRC report was adopted by its members, but contains a number of appendices, including Part 4 – Positions of Commission Members. The Program Administrators would like to address some of the comments of Tom Regh, Progressive Energy Services. The Program Administrators appreciate Mr. Regh’s interest in energy efficiency, and the time and effort he has put into promoting energy efficiency in the Commonwealth. The Program Administrators respectfully submit that some of Mr. Regh’s analyses and conclusions, which focus primarily on the Home Energy Services initiative (“HES”), contain inaccuracies and misleading and

⁵ For additional discussion of the reporting obligations of the Program Administrators, please see the Comments of the Compact filed with the EPRC on May 17, 2013.

unsubstantiated statements.⁶ While the following comments do not detail or attempt to rebut every issue raised by Mr. Regh, the Program Administrators provide the following clarifying information on several points contained in Mr. Regh's position statement.⁷ For additional information on HES and further details on program efforts and achievements, please see presentations of the Program Administrators to the EEAC on June 12, 2013 and August 22, 2013, attached hereto as Appendix A.

The Program Administrators strongly disagree with Mr. Regh's opinion that the PAs do not value contractors and that many contractors have "opted out" of the program. In fact, the Program Administrators greatly value the many participating contractors, and understand acutely that the programs would not exist without contractors installing energy efficiency measures. Contrary to Mr. Regh's implications, the number of participating contractors has grown significantly since 2010, with over 125 approved contractors currently providing services to the Program Administrators' customers, with ancillary benefits of job creation in the energy efficiency sector. Many of these contractors have expressed satisfaction with the program through comments to the EPRC⁸, at the EEAC, and in other venues. The Program Administrators provide significant training resources to contractors, and established a Contractor Best Practices Group in 2011, at the contractors' request, which meets monthly in order to provide a forum for discussions and to improve program delivery and strengthen relations.

Mr. Regh attributes many costs of HES to "overhead," implying that they are administrative costs that do not benefit customers. In fact, the percentage of costs that he deems "overhead" include funding that provides direct benefits to customers and contractors. For example, the non-incentive portion of the budget includes the cost of conducting the home

⁶ In terms of Mr. Regh's requests for data, the Program Administrators worked with DOER in early April to provide responses and also assisted in providing responses to similar requests of his outside of the EPRC process.

⁷ For additional discussion of some points of clarification that Program Administrators provided during the EPRC process, please see the Comments of the Compact and Unifil filed with the EPRC on May 17, 2013, as well as the PAs' presentation on April 3, 2013, entitled "Working to Expand and Promote Energy Efficiency" that is included in the Appendix to the EPRC report.

⁸ Please see the following comments filed with the EPRC on or about May 17, 2013 which offer support and additional points of clarification: Paul Murphy, Director of Operations for EEI, Inc.; Richard Frehill, Owner of Frehill Insulation; Vin McLaughlin of McLaughlin Weatherization; Christopher Alphen of Dolphin Insulation; Tom Cahill of TC Building; Rick Taglienti of Rogers Insulation Specialist; Patrick & Christine McEachern of McEachern Insulation.

energy assessment (sometimes referred to as an audit). This assessment includes, but is not limited to a combustion safety test, analysis of the thermal envelope, mechanical equipment, appliances, a site-specific home energy report, distribution of several instant savings measures (e.g., efficient lighting, programmable thermostats, faucet aerators, low flow shower heads and advanced power strips), full weatherization work scope and general energy efficiency education. The “overhead” also includes items such as highly subsidized training for participating contractors, subsidized certifications (e.g., BPI credentials) and incentive bonuses for both contractors and customers that promote adoption of deeper savings. The claim that these funds, which directly benefit customers and contractors, are “overhead” is misleading and represents an incomplete understanding of the nature and use of funds.

Mr. Regh’s assertion of low implementation and participation rates and low savings from 2010 through 2012 is based on a limited review of information and does not reflect a comprehensive understanding of the PA programs. For example, looking at one year of production and comparing it to total housing stock, as Mr. Regh did, does not take into account the hundreds of thousands of customers served over multiple years of energy efficiency programming in the Commonwealth. Additionally, this narrow view does not take into account the number of customers who choose to make significant investments in energy efficiency based on recommendations in the home energy assessment that are not all claimed by HES Program Administrators. The impact of the HES initiative recommendations leading to customers pursuing deeper energy efficiency investments is evidenced by the more than \$60,000,000 in energy efficiency upgrades financed via the HEAT loan in 2012 alone (and that only accounts for customers who chose to finance their improvements rather than paying for them out of pocket). Further, regarding savings in the initial three-year plan of 2010-2012, the gas PAs reached 88% of the statewide three-year annual savings goal, for a total savings of 49,022,624 therms, and electric PAs reached 91% of the statewide three-year annual savings goal, for a total savings of 2,389,645 MWh. For that same time period for HES, statewide gas and statewide electric savings each exceeded 100% of goal. These goals were very aggressive stretch goals, and these savings represent a major increase over prior years. This successful ramp-up demonstrates the success of the Program Administrators’ approved energy efficiency plans. Indeed, over 200,000 households were served under HES in 2010-2012, and participation rates continue at high levels.

The Program Administrators strive to reach all customers, including hard-to-reach customers, and are required by law to seek all available cost-effective energy efficiency. The Program Administrators have committed to mitigating residential barriers and to serving hard-to-reach customers, and have worked extensively with stakeholders in developing enhancements designed to address barriers, including establishment of and participation in a Residential Barriers Working Group. This working group was convened in accordance with a DPU directive; the detailed report of this working group was submitted to the DPU on September 30, 2013 and is attached hereto as Appendix B to these comments. Mr. Regh's statement that hard-to-reach customers are "unwilling" customers does not appear to be based on any reliable information, and does not take into account the mandate to seek all available cost-effective energy efficiency and the DPU's directive on residential enhancements. Additionally, stating that Program Administrators should focus on one program (HVAC) instead of another (lighting) demonstrates a lack of understanding of PA requirements and goals, which are to promote all cost-effective programs and obtain energy savings for their customers and the Commonwealth. In fact, HES utilizes a whole-house approach that provides a fuel blind evaluation of all cost-effective energy efficiency improvement opportunities. In addition to providing energy efficiency education to the customer, the whole-house assessment evaluates the cost-effectiveness of weatherization opportunities, domestic heating and hot equipment upgrades, central air conditioning upgrades, home appliance use and consumer electronics use.

Regarding the calculation of benefits, Mr. Regh makes several statements to the effect that the PAs misrepresent and over-count program benefits. There is simply no basis for this assertion. Massachusetts has an extremely robust EM&V system, in which evaluation work is conducted by competitively procured third-party evaluation contractors, and overseen by the Program Administrators and the EEAC. These evaluation studies are subject to extensive regulatory review in DPU evidentiary hearings related to the PAs' performance in implementing their energy efficiency plans. All program benefits are detailed in the Massachusetts Technical Reference Manual, which is filed with each plan and report, and which includes all best available data at the time of publication.

Lastly, Mr. Regh recommends additional reporting. Because of the extensive amount of information already reported to advisory and regulatory bodies, the PAs respectfully believe that existing reporting is sufficient to ensure robust oversight and execution of programs. The PAs provide detailed program level data for multiple metrics in publicly filed documents, which were developed after an extensive stakeholder input process in D.P.U. 08-50, including budgets, annual and lifetime savings, benefits, cost-effectiveness, funding sources, competitive procurement, low-income spending, and greenhouse gas reductions. The DPU approved the energy efficiency plan template and tables developed in this stakeholder process and directed the PAs to comply with the template. Revised Energy Efficiency Guidelines, D.P.U. 08-50-B at 9-12 (2009). The PAs also file cost-effectiveness screening models at the measure level for each plan and report submitted to the DPU. In addition, the PAs are actively participating in the EEAC's working group dedicated to building a statewide energy efficiency database.

In addressing some of Mr. Regh's comments, the Program Administrators seek to provide a more balanced and accurate view of the energy efficiency efforts and outcomes in Massachusetts. The PAs will continue to aggressively pursue energy savings, promote energy efficiency through education and marketing efforts, support contractors, provide transparent data, and engage with stakeholders during this three-year plan and into the future. The current regulatory framework overseeing energy efficiency appropriately allows for improvement, transparency and effective implementation of energy efficiency plans. Adding new metrics, reporting or tracking requirements will increase the costs to customers and administrative burdens associated with delivery of the programs without necessarily improving programs or increasing savings. There is no compelling reason to change the current energy efficiency framework, and indeed evidence shows that it is working very well. The Program Administrators emphasize that consideration of any modifications should balance the successful accountability and delivery of beneficial and cost-effective services of the current framework against additional costs for customers and administrative burdens on the PAs that do nothing to improve delivery of services or increase savings.

Dated: October 28, 2013



Mass Save[®] Home Energy Services Update

Ellen Pfeiffer
National Grid
June 2013





Successful New Program Design

- Customer centered changes in the HES program over the past three years:
 - Created a unified and integrated gas and electric service model
 - Moved to a set price model, protecting customers from price manipulation and ensuring cost of projects will not exceed least cost procurement.
 - Expanded pathways to participation with IIC and HPC participating contractors.
 - Maintained high rates of internal QA/QC and implemented additional 3rd party QA/QC to protect customers and ensure high quality contracting work.



Recent Program Successes

- Recognized as 2013 ACEEE Exemplary Program
- Creating Jobs
 - 2011 Workforce Development Study showed a total of 834 Full Time Equivalents employed across IICs, HPCs, and LVs
 - 95 Participating IICs
 - 22 HPCs
- Driving Savings
 - 2012 average statewide recommendation to major measure installation*
close rate: 45%



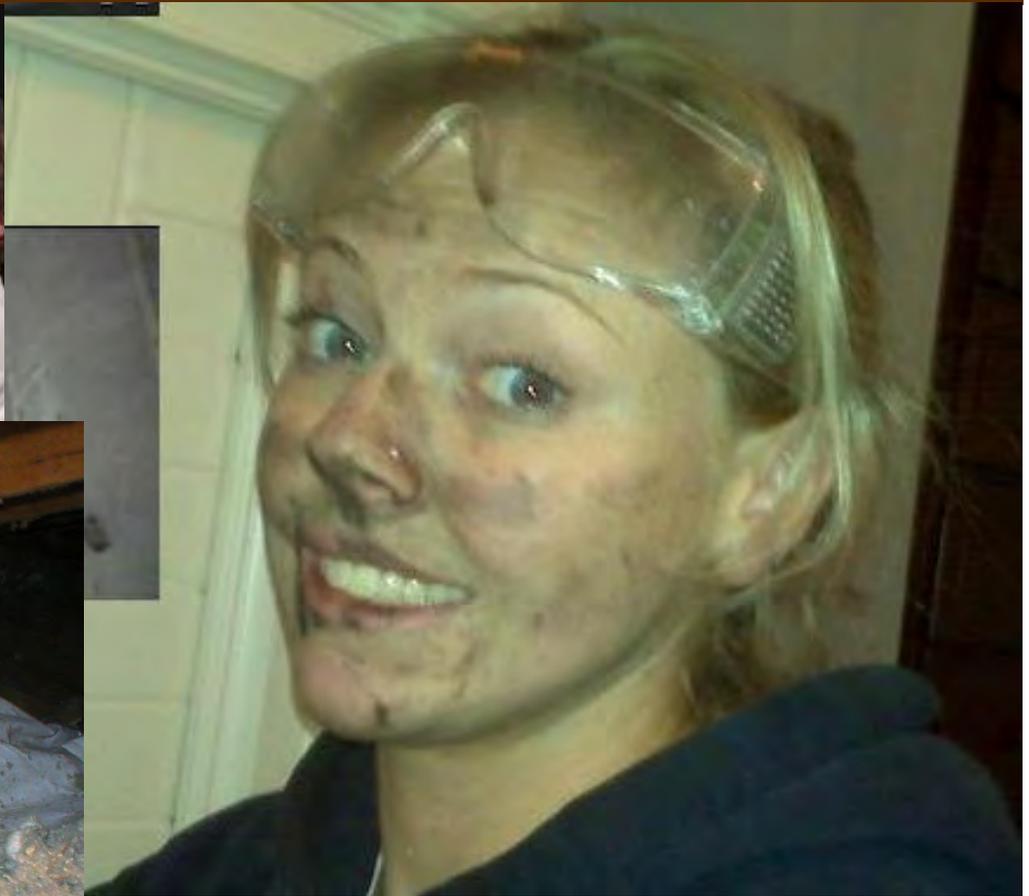
* (Attic insulation, Wall insulation, Duct insulation, Heating pipe insulation, Basement insulation, Air sealing, Duct Sealing, Brushless fan motor, Secondary recycled refrigerators/freezers, High Efficiency qualified heating, water heating, and central air conditioning equipment)



Workforce Development



Growing our business together





BPWG Successes 2012-2013

- Development of Group Bylaws
- Prioritization of Group Goals
- Streamlining of Customer Required actions for HES and HEAT loan participation across the state
- Formation of monthly contractor call to communicate BPWG items
- Sharing of Contractor Employee Recognition and Incentives
- Addition of “What’s New in the Industry” portion to the meetings
- Regular PA Updates on pipeline and marketing campaigns



BPWG Successes 2012-2013

Lead Vendor Process Improvements:

- Improved Energy Specialist / Contractor Communication:
 - Energy Specialist field staff shadowing IICs jobs to improve job scopes
 - Customer FAQ list developed by IICs posted on Mass Save site.
- LVs allocated more resources to field support of contractors on site.
 - Job Shadowing, single point of contact
 - One on one combustion safety training in response to survey of contractor training needs
- Established a process to allow contractors more freedom in adjusting the work scope on the job as necessary, reducing costly time spent on approval of change orders.



Improving contractor performance through reporting

Work Quality
Customer Service
Paperwork
Time to Serve
IIC Metrics

**Over 50% of
contractors
rank above 9.0
on a 1-10
ranking**

**Steady
consistent
improvements
over time**

**HPC Metrics
Introduced in
2013**



Additional Contractor Improvements

- Some PAs established round table discussions at quarterly IIC and HPC meetings to get more discussion and candid feedback

"I like that there seems to be increased opportunity for feedback / cooperation / support."

"I love the format! Helped me think of ways to deliver our services better and ultimately serve our customers more effectively"

"Thank you for all your work!"

"Felt like I was heard."



Sales and Marketing Training

- Offered in response to Survey of contractors of top needs

“The financial outlook as to how accomplish sales and profit goals. The excel work book that was given as a gift is great.”

“I wanted to thank National Grid and you personally for offering this second installment of the Sales Accelerator Training... I have been studying marketing for over 30 years and your training proved to me, once again, that one can always learn more, in this area, which is critical to any successful business.”

“Just wanted to say thank you very much for sponsoring the training yesterday. It was extremely valuable and positive on many levels. The sales training was perfectly matched for our industry, Blaine was well prepared, and I especially loved the team building aspect. Everyone I talked with felt the same way. This was a big win.”



Additional Contractor Improvements

- Surveyed HPCs and IICs for development of new subsidized, co-branded marketing materials: post-cards and lawn signs

Energy in P
in P

Participating Contractor
617-123-1234

**I Saved 75%
on Insulation!**

Participating Contractor Company
617-123-1234

Mass Save Home Energy Services Program
PARTICIPATING CONTRACTOR



New Program Enhancements



Thank you to all the stakeholders





2013-2015 New Enhancements

	2013				2014				2015			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Cost-effective new technologies	Light Blue	Dark Blue	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange
Customer Follow-up Strategies	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue				
Web Enhancements/Online Options	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue				
Efficient Neighborhoods +	Light Blue	Dark Blue	Dark Blue	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange
Pre-weatherization	Light Blue	Dark Blue	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange
HPC & IIC trainings	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue				
2-4 Unit Incentives	Light Blue	Dark Blue	Orange	Orange	Orange	Orange	Orange	Orange				
Community Outreach	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue				
Deeper Energy Savings	Light Blue	Light Blue	Light Blue	Light Blue	Dark Blue	Orange						
Trade Ally Outreach	Light Blue	Dark Blue	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange
Packaged Measures	Light Blue	Light Blue	Dark Blue	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange

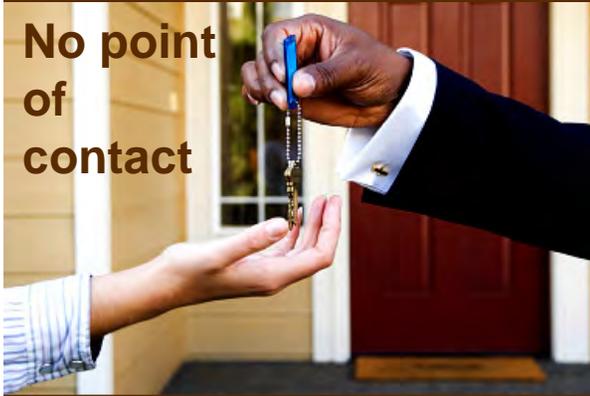
Light Blue: Research/Planning

Dark Blue: Implementation or Ongoing Effort

Orange: Evaluation/Retooling (if necessary), and implementation



Barriers Addressed by Efficient Neighborhoods +



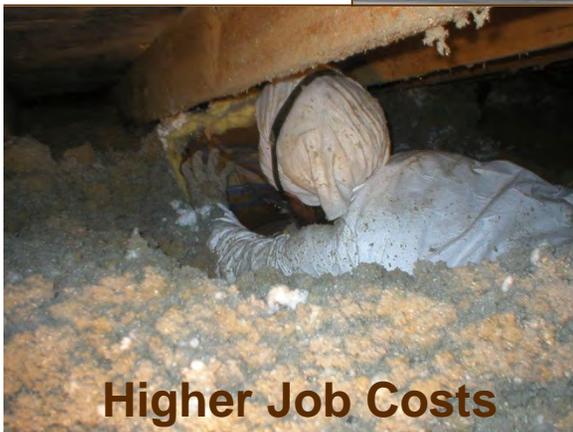
No point of contact



Split Incentives



21% of Massachusetts housing stock is in 2-4 family homes



Higher Job Costs



Pre-Weatherization Barriers



Residential Barriers Working Group



A UIL HOLDINGS COMPANY

Blackstone Gas Co.

"It's there when you need it"



Columbia Gas of Massachusetts

A NSource Company



nationalgrid

HERE WITH YOU. HERE FOR YOU.

New England Gas Company



LEAN

Low-Income Energy Affordability Network



Western Massachusetts Electric

A Northeast Utilities Company



The Commonwealth of Massachusetts

DEPARTMENT OF PUBLIC UTILITIES



Enhanced Incentives



A photograph of a three-story green house with white trim and a porch. The house is the central focus, with several callout boxes pointing to different parts of it. A large brown '\$22,000' is overlaid on the house. The callouts include:

- \$500 Bonus for doing 2 deeper measures
- Common Area LED lighting
- \$200 Refrigerator Rebate
- Up to \$4000 for Early Boiler Replacement
- 90% up to \$3000
- Additional 50% House
- Funding to address pre-weatherization barriers
- Additional \$100 on Boilers and Furnaces



3 Family Example – The Whole Package!

Incentive Description	Customer Contribution*	Incentive
Lighting in units and common areas	\$0	\$300
Low flow showerheads & faucet aerators	\$0	\$50
Programmable Thermostats	\$0	\$150
Targeted cost-effective air sealing	\$0	\$800
Fully insulated 3 family (includes adder incentive)	\$405	\$7,695
ENERGY STAR® refrigerator retrofits in all units	\$1,200	\$600
Early boiler replacement of 3 units (non-owner occupied)	~\$9,000	\$12,000
EN+2-4 family whole house landlord incentive adder	\$0	\$500
0% HEAT Loan up to \$25,000	Principal only - Interest subsidized	

Contribution	Incentives	Total
\$10,605	\$22,095	\$32,700

*Estimates

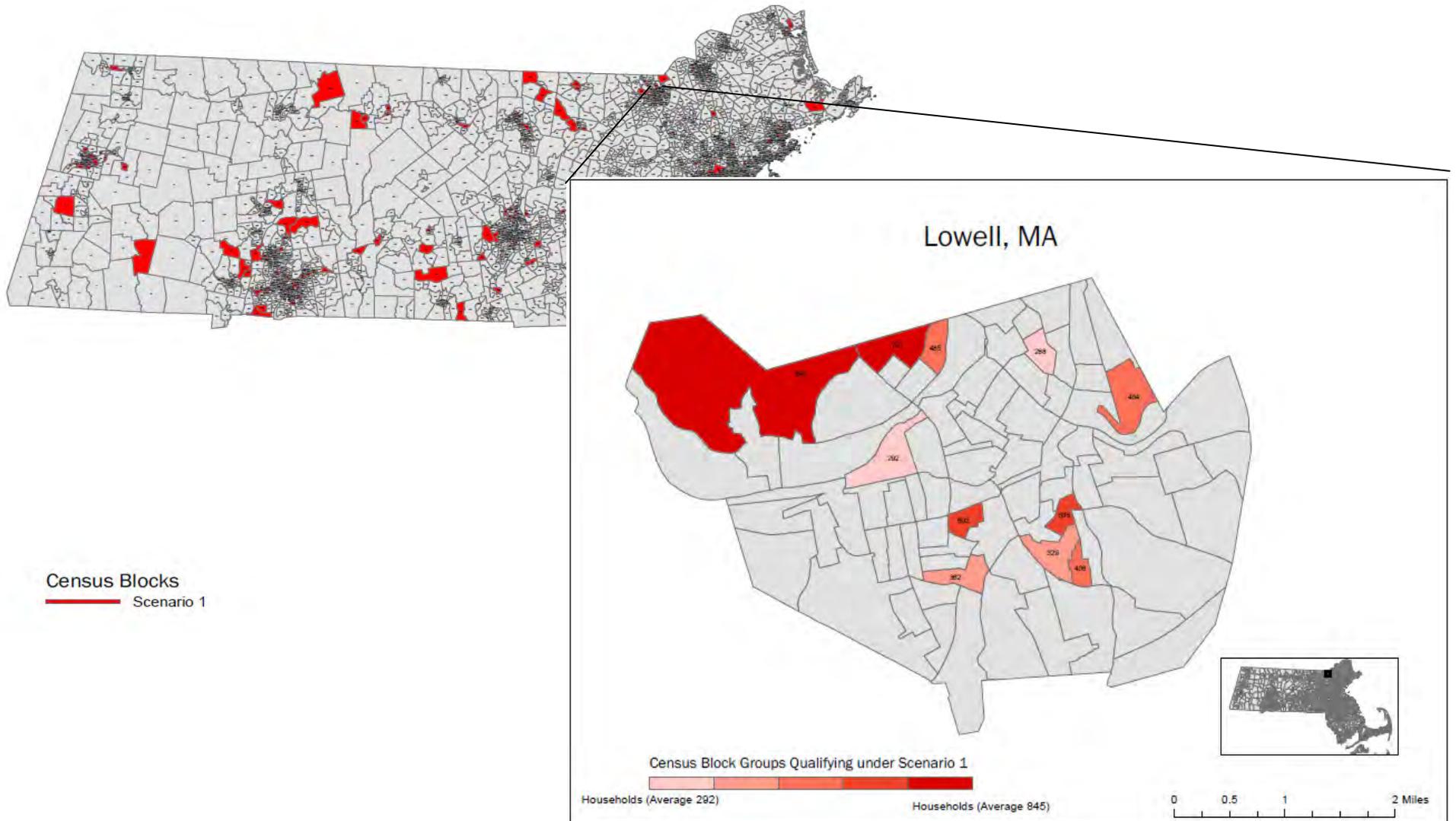


Early Evaluation Collaboration





Community Selection





Targeted Community Marketing

Mass Save's Efficient Neighborhoods Plus Presents:

ALL ACCESS INCENTIVES & REBATES

YOUR TICKET TO **HOME ENERGY SAVINGS**

LIMITED OFFERS NOW THRU SEPT 30 TOWN OF ADAMS

1-855-ENE-PLUS

Exclusive Rebates & Incentives for Customers in Adams

The neighborhood is buzzing about Efficient Neighborhoods Plus, sponsored by National Grid and Berkshire Gas! This town-wide energy-saving event provides you and your neighbors with generous incentives to help reduce your energy costs while improving your home's comfort, safety and value.

Through Efficient Neighborhoods Plus, you may be eligible to receive:

- 90% Off Insulation Improvements, up to \$3,000
- \$200 Rebate for a new Energy Star® refrigerator
- Generous rebates to replace your old boiler, up to \$4,000
- Additional incentives for landlords to make improvements to all eligible units in the home
- No-cost, targeted air sealing
- 0% Financing opportunity for eligible improvements, up to \$25,000
- Plus, many more saving opportunities

These exclusive offers are for a **LIMITED TIME** only through **September 30, 2013!**

90% OFF
Insulation Improvements up to \$3,000

KEEP YOUR HOME COMFORTABLE YEAR-ROUND

SAVE \$4,000
Up to \$4,000
When you replace your older inefficient boiler

REDUCE ENERGY COSTS WITH HIGH-EFFICIENCY EQUIPMENT

SAVE \$200
On a new ENERGY STAR® Refrigerator

REPLACE YOUR OLDER, INEFFICIENT REFRIGERATOR

Schedule Your No-cost Home Energy Assessment Today!
1-855-ENE-PLUS
(363-7587)

Please refer to rebate-specific material provided at the Home Energy Assessment for complete details and eligibility requirements for all offers. Participation in Efficient Neighborhoods Plus is limited to eligible residential customers of participating Mass Save Sponsors (living in, or owning, a 1-4 family home in a selected community). Eligibility for rebates/incentives is based on the findings of the Home Energy Assessment. Offers cannot be combined with other Mass Save rebates. Other restrictions apply and offers are subject to change or cancellation. Limited income households may qualify for additional services and will be referred to local Community Action Agencies.



Renew Boston Demo for 2-3 Families

The flyer features a teal header with a white silhouette of the Boston skyline. Below this, a photograph shows a row of multi-story residential buildings. The main text is in large, bold, orange and teal fonts. Logos for Renew Boston, National Grid, NSTAR, and mass save are included. At the bottom, there is a photo of three electrical meters and the date 'june2013'.

Renew Boston
Save Energy. Save Money
Thomas W. Morris, Mayor

REINOVATE BOSTON

nationalgrid
HERE WITH YOU, HERE FOR YOU.

NSTAR

mass save
Savings through energy efficiency

new
ENERGY-EFFICIENCY INCENTIVES

FOR BOSTON DUPLEXES & TRIPLE-DECKERS

Revitalize Your Entire Building
now
WITH RENEW BOSTON

SEE REVERSE FOR MORE DETAILS

june2013

- Aimed at driving increased landlord participation
- 90% up to \$3000 per unit when all eligible units are weatherized
- Test in Boston. Assess and potentially expand statewide.



Addressing Pre-Weatherization Barriers

- 2012 Pilot:
 - Showed turn-key option did not influence up take
 - Showed that customers acted faster to upgrade their homes
 - Indicated that customers needed more than a month to remediate
- 2013 Offering:
 - Year round
 - Customer driven
 - Enhanced incentives:
 - 100% up to \$250 for knob and tube evaluation
 - 100% up to \$250 for dryer venting repair or installation
 - 100% up to \$300 for combustion safety inspection/repair of high CO failures

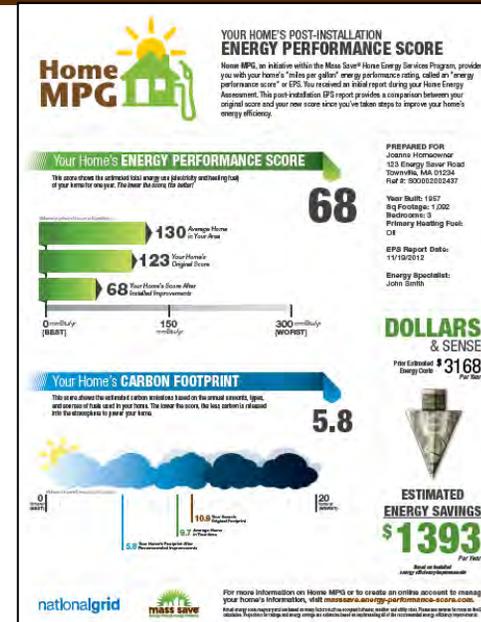


Driving Deeper Savings

- **Early Boiler Replacement Initiative**
 - May – September
 - Up to \$3500 for boilers at least 30 years old.
 - Up to \$4000 for boilers in non-owner occupied buildings
- **New Technologies:**
 - Advanced Power Strips
 - LED Lighting



Additional Targeted Initiatives




power to \$ave Wellesley's Energy Savings Program

NO-COST Home Energy Assessments

March 26 **140 Homes**

Let's reach our goal of **400 homes!**

781.235.7600 WellesleyPowerToSave.com

Wellesley's Energy Savings Program is a program of the WELP (Wellesley Energy Leadership Program) and is supported by the Town of Wellesley's Sustainable Energy Committee.



Cross Marketing

- Messaging on letters and rebate checks informing customers about the suite of EE opportunities as well as contact information to schedule an assessment.
- Joint electric and gas training programs
- Joint electric and gas circuit rider services
- Joint advertising in trade publications



Mass Save[®] Home Energy Services Follow Up

Ellen Pfeiffer
National Grid
July 2013





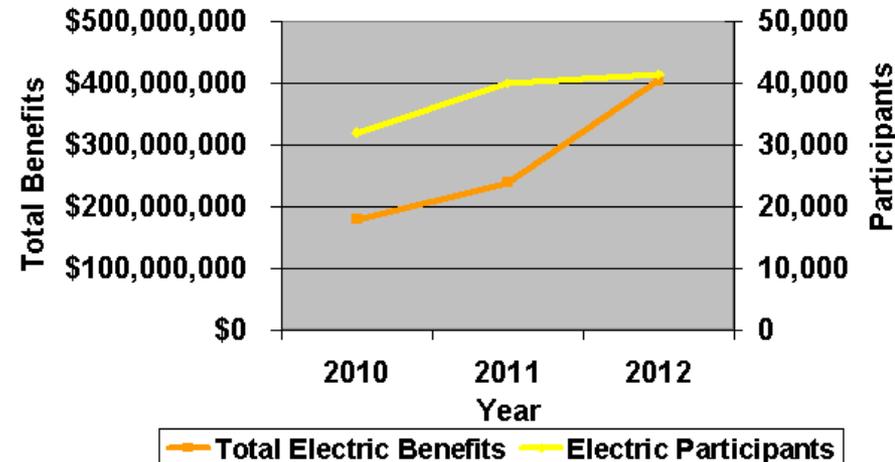
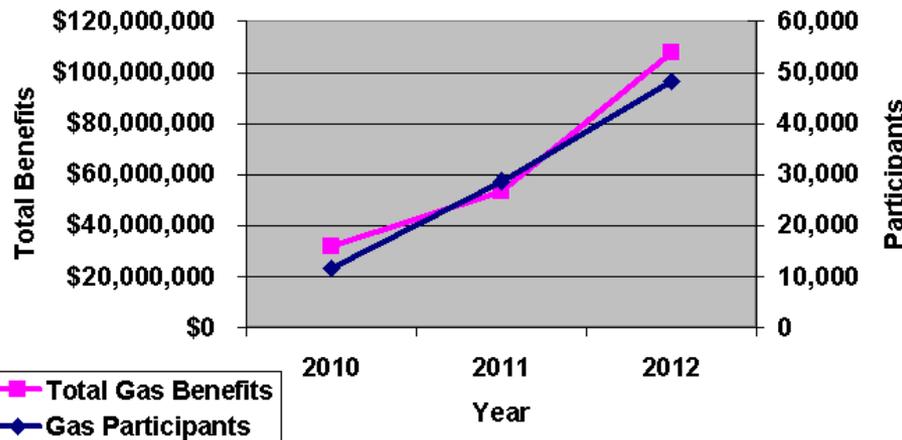
Key Program Statistics

STATEWIDE GAS

Year	Number of Participants	Annualized Savings (MMBTU)	Benefits	Benefits / Participant
2010	11,582	128,667	\$31,791,567	\$2,745
2011	28,728	155,455	\$53,282,494	\$1,855
2012	48,152	350,593	\$107,914,704	\$2,241

STATEWIDE ELECTRIC

Year	Number of Participants	Annualized Savings (MWh)	Benefits	Benefits / Participant
2010	32,029	35,679	\$179,827,654	\$5,615
2011	40,081	35,468	\$238,768,087	\$5,957
2012	41,467	40,771	\$404,423,426	\$9,753



**2012 numbers are preliminary. Finals will be included in the 2012 Annual Reports.

Key Program Definitions

- **Participant:**

- Electric: A participant is defined as a unique electric account served under this program.
- Gas: A participant is defined as a unique gas account served under this program

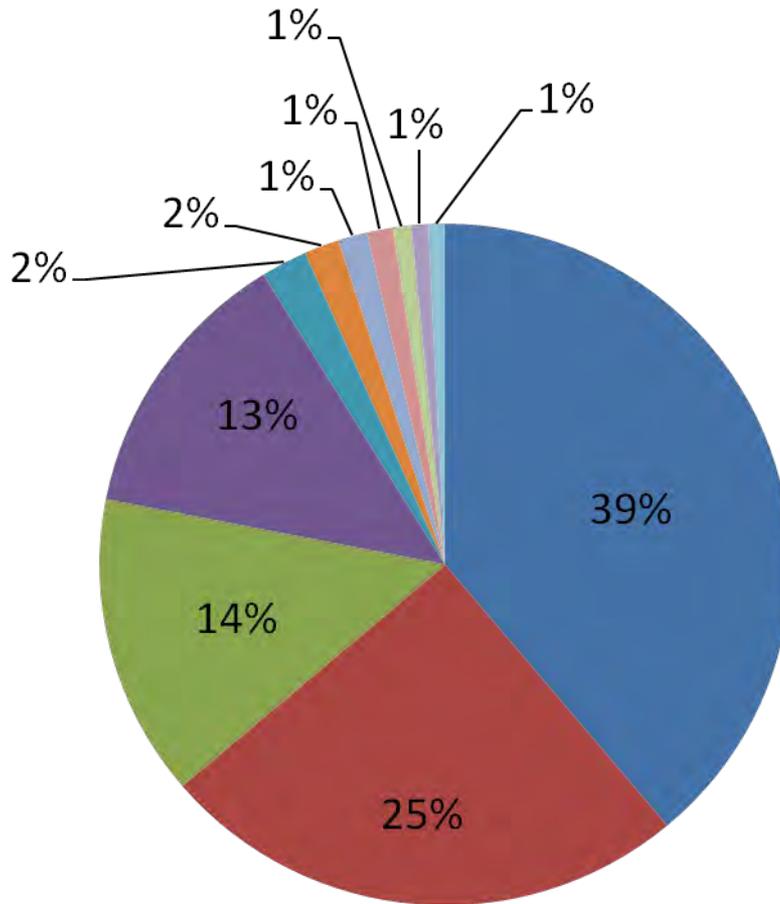
- **Implementation:**

- Installation of any applicable measure as recommended by energy specialist and approved by customer

- **Major Measure Installation:**

- Weatherization, Heating and Hot Water Equipment, Cooling Equipment

Program Marketing Best Practices



**Customer Intake "How Hear"
by Marketing Medium**

- Direct Mail
- Internet/Banner Ad
- Radio
- Bill Insert/Message
- Newspaper Ad
- Email Message
- Event/Outreach
- TV Ad
- Billboard
- PR Newspaper Article
- Others

Sample: 483 customers



Broad Based Marketing

**GET ON BOARD
WITH HOME ENERGY SAVINGS**

**SAVE 75%
on insulation
improvements,
up to \$2,000!**

Get started with a **NO-COST** Home Energy Assessment
866-527-SAVE (7283)
Visit MassSave.com/Onboard for more information and savings opportunities.

mass save NSTAR nationalgrid

Customers must meet program eligibility requirements to participate. Eligibility for rebates & incentives is based on findings from the Home Energy Assessment for qualified measures. Some restrictions apply and offers are subject to change or cancellation.

Put a little sizzle in your savings with generous rebates and incentives on home energy improvements!

- 75% off insulation, up to \$2,000
- Rebates on heating & hot water equipment
- No-cost, targeted air sealing
- 0% financing opportunity
- Much more!

**Schedule a No-Cost Home Energy Assessment
866-527-SAVE | MassSave.com**

Eligibility requirements & restrictions apply

mass save nationalgrid NSTAR

Internet Banner Ads

Billboards



Transit Ads

Radio

 **Click icon to play sample ad**

Word Of Mouth Remains #1 Source of Leads

- Reinforces importance of excellent customer service and quality work
- Also points to importance of contractor network:
 - As mentioned in previous presentation, PAs provide highly subsidized sales and marketing training and marketing collateral to contractors, as requested in contractor surveys.
 - Brochures, post cards, lawn signs, soon to be digital content



**Energy Savings
in Process!**

Participating Contractor Company
617-123-1234

 PARTICIPATING CONTRACTOR





 **This Home
is Saving
Energy!**

Participating Contractor Company
617-123-1234
ContractorCompany.com

 PARTICIPATING CONTRACTOR

BPWG Successes 2012-2013

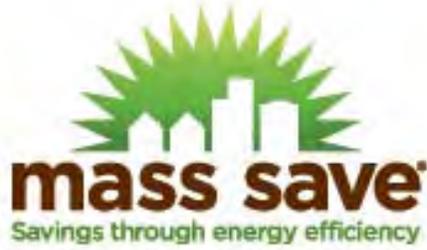
- Development of Group Bylaws
- Prioritization of Group Goals
- Streamlining of Customer Required actions for HES and HEAT loan participation across the state
- Formation of monthly contractor call to communicate BPWG items
- Sharing of Contractor Employee Recognition and Incentives
- Addition of “What’s New in the Industry” portion to the meetings
- Regular PA Updates on pipeline and marketing campaigns

Lead Vendor Process Improvements:

- Improved Energy Specialist / Contractor Communication:
 - Energy Specialist field staff shadowing IICs jobs to improve job scopes
 - Customer FAQ list developed by IICs posted on Mass Save site.
- LVs allocated more resources to field support of contractors on site.
 - Job Shadowing, single point of contact
 - One on one combustion safety training in response to survey of contractor training needs
- Established a process to allow contractors more freedom in adjusting the work scope on the job as necessary, reducing costly time spent on approval of change orders.

EM&V: Highlights and Future Plans

- What was evaluated in 2012?
 - Impact evaluation
 - Air sealing and insulation realization rates (reconciles difference between billing analysis and vendor reported savings)
 - Pre-weatherization initiative
 - HPC process evaluation
- What do PAs see as highlights from most recent HES evaluation?
 - More accurate reporting of all measure savings in 2012 Annual Report
 - Higher gas savings and realization rates in 2012 evaluation compared to 2011
 - Preliminary differences between Lead Vendor and HPC savings
 - PA's standardized a pre-weatherization offering based on recommendations
- What are future HES evaluation plans?
 - Deeper dive into differences between Lead Vendors and HPC savings
 - Revisit realization rate task before the end of the next 3-year plan
 - Efficient Neighborhoods+
- More detail to follow in upcoming Ralph Prah presentation



Report to the Department of Public Utilities

Activities of the Residential Barriers Working Group

by the Residential Management Committee

D.P.U. 12-100 - D.P.U. 12-111

September 30, 2013

nationalgrid



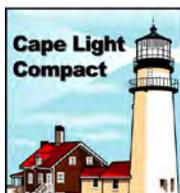
**Columbia Gas[®]
of Massachusetts**

A NiSource Company



**Western Massachusetts
Electric**

The Northeast Utilities System



A UIL HOLDINGS COMPANY

New England Gas Company



**BL  CKSTONE
GAS COMPANY**

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I. INTRODUCTION

A. The Residential Barriers Working Group Members

Pursuant to the Order of the Department of Public Utilities (“Department” or “DPU”) of January 31, 2013 in D.P.U. 12-100 through 12-111 (“Order”) related to the 2013-2015 Three-Year Energy Efficiency Plan filed with the Department on November 2, 2012 (“Plan”), Bay State Gas Company, d/b/a Columbia Gas of Massachusetts, The Berkshire Gas Company, Blackstone Gas Company, Boston Gas Company and Colonial Gas Company, each d/b/a National Grid, Fitchburg Gas and Electric Light Company (gas), d/b/a Unutil, NSTAR Gas Company, New England Gas Company, Cape Light Compact, Fitchburg Gas and Electric Light Company d/b/a Unutil, Massachusetts Electric Company and Nantucket Electric Company each d/b/a National Grid, NSTAR Electric Company, and Western Massachusetts Electric Company (the “Program Administrators” or “PAs”) submit this report summarizing the activities of the Residential Barriers Working Group (“Working Group” or “RBWG”).

The Order states:

Accordingly, the Department directs the Program Administrators to convene a working group with all stakeholders to address the specific strategies to overcome residential barriers. So that we can monitor the progress of the working group, the Program Administrators must provide the Department with an agenda in advance of each meeting.

Order at 44-48.

The Program Administrators convened a working group of stakeholders including representatives of each Program Administrator, the Department of Energy Resources (“DOER”), Department of Housing and Community Development (“DHCD”), Green Justice Coalition (“GJC”), Low Income Energy Affordability Network (“LEAN”), National Consumer Law Center (“NCLC”), Mass Consumer Energy Alliance (“Mass Energy”), and the Office of the Attorney General. Meetings of the RBWG were held on March 27th, May 1st, August 27th, and September 18th. Agendas and minutes from each meeting are included at Attachment A.

B. The Residential Barriers Working Group Report

This report is organized in accordance with the Order, which stated as follows:

In addition, the Program Administrators shall provide a written report to the Department, on or before September 30, 2013, on their progress towards implementing the proposed residential program enhancements. At a minimum, the report should include information on: (1) the Efficient Neighborhoods+ initiative; (2) community-based engagement initiatives; (3) the landlord/tenant barrier; and (4) the pre-weatherization barrier. Specific reporting requirements are detailed below.

Order at 46.

II. EFFICIENT NEIGHBORHOODS+SM

A. Background

The Efficient Neighborhoods+SM initiative is described in the Plan as follows:

Overview

Building on the successful Community Engagement efforts and Low-Income programs, the Efficient Neighborhoods+ initiative will target lower to moderate-income energy consumers in designated communities and neighborhoods. As an extension of the Mass Save[®] HES initiative, this initiative is intended to provide significant energy saving benefits to customers who live in urban neighborhoods with older housing stock and are often financially constrained from making energy efficiency investments. In addition to the benefits provided by the HES initiative, Efficient Neighborhoods+ will include an enhanced incentive structure designed to make energy efficient improvements more affordable for consumers living in these sometimes harder to reach neighborhoods. It is also expected that these targeted neighborhoods will include low-income qualified/eligible consumers thus the Program Administrators plan to work with LEAN on the initiative design and implementation phases to ensure a fully integrated cross-sector approach. Further, given the predisposition of pre-weatherization barriers in this housing stock, it is important to consider introducing limited pre-weatherization incentive offers into the overall initiative design.

Key Strategies

1. **Eligibility**

While the specifics of eligibility have yet to be determined, the premise is to target neighborhood/community “areas” that meet certain demographic criteria versus individual consumers, thus these areas would be designated as “Target Communities”. The following is the minimum guidelines proposed for eligibility:

- All customers in the target areas will be offered the incentives thus eliminating the arduous individual income verification screening process. However, similar to current HES protocols, customers will be educated on Low-Income eligibility requirements and will be referred to appropriate Low-Income Agency to receive eligible energy efficiency services. It is also expected that these targeted neighborhoods will include low-income qualified/eligible consumers. Thus the Program Administrators plan to include LEAN in the initiative design and implementation phases, as well as reporting and assessment to ensure a fully integrated cross-sector approach. Further, the Program Administrators will consider LEAN’s Network infrastructure as a delivery mechanism for implementation services.

- Only 1– 4 unit existing buildings are eligible for the enhanced incentives.
- 5 + units will be referred to the Mass Save Multi-Family Retrofit core initiative, and low-income-eligible multi-family building owners will be referred to the Low-Income Multi-Family Retrofit initiative or to the appropriate low-income agency to receive comprehensive eligible energy efficiency services without co-payment, where applicable.

2. **Target Areas**

Determining specific target areas based on pre-determined demographic and housing stock criteria is a key component as well as a key challenge of this effort. Prospective areas of focus may include but are not limited to Green Communities that have also been designated as Gateway Communities or Environmental Justice communities with a focus on best addressing low- to moderate- income consumers. Although the best methodology for employing eligibility identification has yet to be determined, one potential for consideration is using the 2010 census to identify those census tracts that met the following criteria:

1. Lower to moderate income customers based on the state’s median income
2. Greater than 70% penetration of 1-4 unit existing buildings (those eligible for HES)
3. Target census tracts may then be ‘fitted’ to Zip+4 groups based on some or all of the Zip +4 being in the tract. The Zip+4 residences might then, subject to personal data privacy protection laws, be able to link to PA customer data to develop lists of eligible customers
4. These customers/addresses may then be fed into mapping software to generate a map of the target neighborhoods.

Only people in the designated areas will be eligible for the Efficient Neighborhoods+ initiative.

Plan at 171-172.

B. Efficient Neighborhoods+ Selection

The Order states:

With regard to the Efficient Neighborhoods+ initiative, the report should describe: (1) the selected target communities, and the process and criteria used to select those communities.

Order at 46.

1. Selected Target Communities

The selected target communities are:

National Grid: Lowell, Watertown, Adams, North Adams and Fall River

NSTAR/Northeast Utilities: Watertown, Hyde Park, Plymouth

Western Massachusetts Electric Company /Northeast Utilities: West Springfield

Columbia Gas of Massachusetts: West Springfield

The Berkshire Gas Company: North Adams and Adams

New England Gas Company: Fall River

Cape Light Compact: All towns on Cape Cod and Martha's Vineyard with income verification

Unitil: Townsend

2. Methodology for Selecting the Neighborhoods

In order to determine the target neighborhood based on demographic and housing criteria, the PAs initially conducted their own research and analysis by overlaying the list of Environmental Justice communities with the towns having a median household income within 61% to 120% of the state median income bracket. The PAs then considered those towns with a relatively high population of minority or non-English speaking residents. From this initial analysis, the PAs concluded that a more refined analysis was necessary to enable identification of the neighborhoods that would most benefit from Efficient Neighborhoods+. Toward this end, the PAs retained Opinion Dynamics ("Evaluators") to develop a methodology for selecting a federal census block neighborhood for each PA.

The Evaluators proposed a three-step approach to identify target neighborhoods and customers: 1) initial data analysis to develop qualification thresholds and narrow the set of communities to target; 2) in-depth community analysis and final community selection and; 3) development of customer targeting lists.

Step 1 - During the first step, the Evaluators assembled a database of all census block groups in Massachusetts. For each census block group, the database contained the name of the town where the target census block group was located, the PA or PAs servicing that area, population count, housing count, income, building stock characteristics, and homeownership status.

To assemble the database, the Evaluators used census data for Massachusetts available as part of the American Community Survey ("ACS") results for 2007-2011, along with MassGIS data. The census block group is the smallest geographic unit provided by the ACS and is a useful unit of analysis for purposes of the initiative.

Using the assembled database, the Evaluators ran analyses to develop an optimal combination of income and housing criteria to support community selection for the Efficient Neighborhoods+ initiative. The evaluators ran multiple iterations to identify optimal thresholds for community

inclusion. As part of the analysis, the Evaluators examined a variety of descriptive statistics and analyzed the data statewide and by PA. As a result of the analysis, the following criteria were identified as optimal for the initial filtering of possible target neighborhoods:

- Census block groups where 30% of households or more have incomes between 61% and 100% of the state median
- Census block groups where 30% or less of units are in 5+ multi-family unit buildings

In setting these thresholds, the Evaluators sought to avoid census block groups with high concentrations of low-income program-eligible customers and/or multi-family (5 or more) units because customers with these characteristics are serviced through the low-income program and/or multi-family initiatives, and therefore do not qualify to participate in the Home Energy Services (“HES”) initiative. A main goal of Efficient Neighborhoods+ is to increase participation in HES, so the Evaluators sought to target customers who would be eligible to participate.

By applying these criteria, 112 towns were identified as potential Efficient Neighborhoods+ communities. Over 60% of those towns identified were also Environmental Justice or Gateway Communities.

Step 2 - To further refine the analysis and identify a final set of communities, the Evaluators analyzed and mapped a selective set of communities (out of the pre-qualified set identified through Step 1) in terms of home ownership data, total PA customer count, housing and income characteristics of those customers,¹ as well as prior participation data.² The predominance of a particular heating source was not considered in choosing a neighborhood.

At the conclusion of this step, PAs isolated and identified communities where the Efficient Neighborhoods+ initiative would be implemented.

Step 3 - To support more precise and successful customer targeting, PAs engaged the Evaluators to use PA customer data to develop target customer lists that included account numbers, customer names and associated addresses. The lists excluded non-qualifying customers (past participants, low-income or residing in 5+ unit structures).

The Residential Barriers Working Group met on March 27, 2013 to discuss this methodology as presented by the Evaluators. All participating stakeholders at the meeting unanimously supported this methodology.

¹ The Evaluators used PA rate code data to identify low-income customers and ran additional analysis of customer addresses to identify customers residing in 5+ unit structures.

² The Evaluators used HES program tracking data.

C. Efficient Neighborhoods+ Design Elements

The Order also requests:

the design elements, including, as appropriate, elements targeted at overcoming the renter/landlord barrier.

Order at 46.

The overall design of the Efficient Neighborhoods+ combines enhanced incentives that encourage a whole-building approach (as discussed in the section below) as well as various delivery and marketing mechanisms that encourage participation by harder-to-reach customers, including those in the tenant/landlord category (as discussed in Section IV).

D. Technologies Offered and Participant Incentive Structures

The Order also seeks the:

technologies offered and participant incentive structures, including, as appropriate, incentives intended to overcome the pre-weatherization barrier (see Exh. Comm-1, at 127-128).

1. Efficient Neighborhoods+ Incentive Structure

The PAs proposed an enhanced incentive structure that would make energy efficiency upgrades more affordable for lower to moderate income customers, thus increasing the installation of major measures, and that could be delivered through the current HES program delivery infrastructure, utilizing the current lead vendors under contract with the PAs. In addition, the incentive structure would have to be cost-effective. The incentive offering also includes the 2-4 Family Landlord Whole House Insulation Adder incentive to increase 2-4 family landlord participation. In addition, the pre-weatherization incentive was increased to up to \$800 (to cover up to three barriers) from the previous cap of \$300 (which only covered one barrier).

Table 1 below is a chart of each of the Efficient Neighborhoods+ incentive designs that were accepted by the Residential Barriers Working Group.

Table 1

Enhanced Incentive Description	Enhanced Efficient Neighborhoods+ Incentives	Existing Incentive
Common Area Lighting (LED or CFL depending on fixture)	\$120	\$0
Pre-Weatherization Barrier Incentive	Up to \$800	\$Up to \$800 ³
90% up to \$3,000 Insulation per unit/single family	\$1,980	\$1,650 (Based on historical costs)
2-4 Family Landlord Whole House Insulation with Adder (50% of Customer Contribution)		(Based on historical job costs)
2 Family	\$5,130	\$4,000
3 Family	\$7,695	\$6,000
4 Family	\$9,500	\$7,500
Early Retirement Refrigerator (ENERGY STAR® labeled)	\$200	\$150
Efficient Neighborhoods+ Boiler & Furnace Incentive Adder	\$100	\$0
Early Boiler Replacement (EBR) Rebate with Additional \$500 Incentive for Non-owner Occupied Properties	(\$4,000) Unrestricted Timeline	(\$4,000) Restricted Timeline
Efficient Neighborhoods+ Whole House \$500 Incentive Adder Package Insulation + Heating Equipment	\$500	\$0

E. Delivery Mechanism

The Order also requests information on the delivery mechanism. (Order at 46-47). As stated in the Plan:

The program is delivered by lead vendors selected through a competitive bidding process. Lead vendors are responsible for managing and training market based

³ Based upon evaluation results from 2012 on pre-weatherization barriers, in 2013 this offering was incorporated into the HES initiative as a standard offering to customers with knob and tube, dryer vent, and high CO barriers.

participants such as participating IICs and HPCs. Additional lead vendor responsibilities include:

- Consistent statewide training
- Data reporting
- Achieving aggressive savings
- Customer satisfaction
- Quality control standards
- Scheduling requirements
- Technical Assistance
- Maintain and report health and safety information

Two groups of participating contractors, Home Performance Contractors (“HPCs”), and Independent Installation Contractors (“IICs”) provide services in addition to those services offered by the lead vendor. All participating contractors must meet program eligibility and requirements. HPCs independently recruit customers, provide Home Energy Assessments, and implement weatherization measures. IICs provide installation of weatherization measures for those customers who received a Home Energy Assessment from the lead vendor. IICs also have the opportunity to independently recruit customers and refer them to the lead vendor for the Home Energy Assessment.

In order to receive incentives or program rebates, customers are required to have a Home Energy Assessment through either the PAs lead vendor or via a participating Home Performance Contractor to identify and prioritize all cost-effective energy efficiency upgrades. Insulation work, whether performed by a Home Performance Contractor or Independent Installation Contractor, will have a quality control inspection performed by the PA-vendor, or third party vendor when the work is complete. This will ensure that high quality is maintained, and installations meet BPI standards or similar standards set by the PAs. After a competitive bidding process, the PAs contracted with a third-party Quality Control (“QC”) vendor to perform QC inspections of program implementation vendors, and participating contractors. The QC vendor will provide valuable information and feedback to the HES members on successes and identify areas of possible improvement.

Plan at 133-134.

F. Marketing Strategy

The Order asks the PAs to provide the marketing strategy. (Order at 47). The marketing strategy was customized for each partnering municipality. The following describes the efforts in each municipality:

Adams and North Adams

The Berkshire Gas Company (“Berkshire Gas”) and National Grid kicked off their Efficient Neighborhoods+ initiatives in Adams and North Adams during the second quarter of 2013. Multiple strategies were utilized to reach and motivate eligible customers to take the next steps to save energy.

Berkshire Gas and National Grid worked closely with their lead vendors, the Center for Ecotechnology (“CET”) and Conservation Services Group (“CSG”), to develop a number of marketing pieces and activities to promote Efficient Neighborhoods+ including:

- Introduction Letter to, and meetings with, the municipal leaders
- Self-mail Brochure
- Self-mail Postcard
- Last Chance Letter
- Landlord Mailing
- Door Hanger
- Outbound Call Campaigns
- North Adams Transcript 1/4 Page Ad
- The Shopper - Insert
- TheTranscript.com
- North Adams Transcript Facebook/Twitter
- Participation in Identified Town Events
- Direct Mail

Direct contact with customers via gatherings of neighbors and affinity groups at community events and energy efficiency presentations and tabling has been successful in reaching the target audience. In order to increase the success of word-of-mouth, Berkshire Gas and National Grid deployed information tables at community events in the selected towns to promote energy savings activities and the required Mass Save energy assessment. Materials and signage highlighted the time-limited bonus incentives, the energy and dollar savings potential, as well as the increased comfort that households will realize if they participate in Efficient Neighborhoods+. During these events, customers were offered low-cost energy-saving products, such as compact fluorescent lamps (“CFLs”) or LED nightlights. For households that signed up for energy assessments, participants’ names were entered into a raffle for more significant energy-saving measures, such as energy efficient desk lamps and smart power strips. Customers were also provided with information about no and low cost energy-saving measures that they can implement to reduce their energy consumption.

To date, Berkshire Gas and National Grid are very pleased with the response to their Efficient Neighborhoods+ efforts, with audit requests at an all-time high for these two communities.

Cape Cod and Martha’s Vineyard

Pursuant to a Governing Board vote, the Cape Light Compact launched its Efficient Neighborhoods+ initiative on September 1, 2013 to all of its member towns with income

verification for single-family residents from 61-100% of state median income. The effort is being marketed primarily through local channels including the town board representatives, presentations to local groups, and flyers at key events within the towns. The participating contractors are a key force in encouraging participation.

Fall River

For their Efficient Neighborhood+ initiative, New England Gas Company and National Grid partnered to implement the Fall River Neighborhood Energy Contest.

The mission of this initiative is to promote energy efficiency by implementing quantifiable energy saving programs that will reduce energy demand, save money, create jobs, promote energy education and efficient technologies, conserve natural resources and improve the quality of life for residents.

Contest Partners include Mayor William Flanagan's Office, the City's network of neighborhood associations, Bristol Community College, University of Massachusetts-Dartmouth, Citizens for Citizens, The Fall River School Department, the Fall River Council on Aging, local banks and credit unions, to name a few.

The purpose of the Neighborhood Energy Contest was to bring energy efficiency to the forefront for Fall River customers. This is a truly a community-based program fostering friendly competition amongst neighborhood groups to bring in the most energy savings.

For this contest, the neighborhood that has the most savings wins. The selection and notification of the winning neighborhood occurred at the end of August with an award of \$5,000 for a neighborhood improvement project. National Grid and New England Gas have worked together to deliver this innovative community outreach program to encourage customers to take advantage of the programs that each company has to offer. To date, 137 homes (through June 30, 2013) have obtained a Home Energy Assessment and implemented weatherization measures. 47 homes went through the Low-Income program. Total savings through June 2013 were 20,082 therms and 57,400 kWh.

In addition to furthering energy efficiency initiatives in Massachusetts, the New England Gas and National Grid contest promotes job creation. The local economy in Fall River is in desperate need of good paying jobs. The Bristol Community College Green Center, located in Fall River, is a key player in this industry and is a partner in the Fall River Energy Challenge. For example, Tom Martin from TM Construction & Remodeling is a local businessman who donates a great deal of time and money in making Fall River a better place to live. Over the past three years, Mr. Martin has received extensive training at the BCC Green Center and has now doubled his small workforce to provide comprehensive weatherization services to his clients.

In order to get kids involved, New England Gas and National Grid held a local design project for high school students to design a logo for the contest. In addition, a flyer was developed in English, Portuguese and Spanish for kids to share at home with their families. An

Energy Fair was also held in early March at Diman Regional Vocational High School for the community.

Hyde Park and Plymouth

NSTAR met with Town Managers for Hyde Park and Plymouth and others to introduce the Efficient Neighborhoods+ initiative and to gain endorsement and support. NSTAR then met with Community Action Program (“CAP”) agency representatives in Efficient Neighborhoods+ areas to introduce the initiative, gain support, and discuss coordination. As a result, a Low-Income Eligibility education piece was added to the Home Energy Assessment folders for Efficient Neighborhoods+ customers. Marketing strategies for the Hyde Park neighborhood include canvassing/door hangers, telemarketing, follow-up emails to customers, and direct mail such as:

- Efficient Neighborhoods+ Introduction Letter
- Brochure
- Landlord Communication 1
- Letter/Brochure with additional landlord specific communication
- Postcard
- Landlord Communication 2
- Last Chance Communication (customer/landlords)

Lowell

National Grid kicked off its work in Lowell on May 8, 2013 when it met with the Town Manager, the Director of Planning and Energy programs, and others to introduce the Efficient Neighborhoods+ initiative and to gain endorsement and support. In concert with the city, the Christian Hill Neighborhood was chosen for the first round. The City also introduced National Grid to the Christian Hill Neighborhood Association president to further spread the word about the Efficient Neighborhoods+ initiative and learn about the best avenues for connecting with local residents. The Neighborhood Association invited National Grid to table and have sign ups at its National Night Out on August 6th and neighborhood leaders agreed to be ambassadors throughout the community.

National Grid met with LEAN and CAP Agency personnel who serve the City of Lowell, as well as other agency leads who service Efficient Neighborhoods+ neighborhoods to introduce the initiative and gain support and discuss coordination. As a result, a Low Income Eligibility piece was added to the Home Energy Assessment folders for Efficient Neighborhoods+ customers.

In addition to the community outreach listed above, National Grid also worked with its local Home Performance Contractors (“HPCs”) and Independent Insulation Contractors (“IICs”) to canvass the community. Interested contractors submitted canvassing proposals, as well as proof of local canvassing licenses. Contractors have been provided with Mass Save shirts, name tags, and collateral specific to Efficient Neighborhoods+. Each contractor has been allotted a certain number of homes, based upon their canvassing capacity. This method of canvassing has been an innovative new way of helping our contractors build business and connect local contractors with the local market.

Additional marketing tactics for the Christian Hill initiative include telemarketing, follow-up emails to customers, and direct mail such as:

- Efficient Neighborhoods+ Introduction Letter
- Brochure
- Landlord Communication 1
- Letter/Brochure with additional landlord specific communication
- Postcard
- Landlord Communication 2
- Last Chance Communication (customer/landlords)

Townsend

Unitil launched its Efficient Neighborhood+ program in Townsend during August 2013. Under the initiative, Unitil is focusing on residential neighborhoods that meet the Efficient Neighborhoods+ criteria. It is anticipated that customers will be able to sign up through October 31, 2013.

During the second quarter of 2013, Unitil worked with the Town Manager for Townsend, promoting the initiative. In addition, Unitil reached agreement with a contractor to deliver this initiative. Marketing materials were developed and at the end of August, Unitil began marketing to potential participants with income levels at 61% to 100% of the state median income. Unitil expects to begin scheduling audits shortly.

Watertown

NSTAR and National Grid met with the Town Manager and others to introduce the Efficient Neighborhoods+ initiative and to gain endorsement and support. Both NSTAR and National Grid then met with CAP agency representatives in Efficient Neighborhoods+ areas to introduce the initiative and to gain support and discuss coordination. As a result, a Low-Income Eligibility educational piece was added to the Home Energy Assessment folders for Efficient Neighborhoods+ customers. Marketing strategies for Watertown have been similar to those employed in Hyde Park and Lowell, including local contractor canvassing and door hangers, telemarketing, follow-up emails to customers, and direct mail such as:

- Efficient Neighborhoods+ Introduction Letter
- Brochure
- Landlord Communication 1
- Letter/Brochure with additional landlord specific communication
- Postcard
- Landlord Communication 2
- Last Chance Communication (customer/landlords)

West Springfield

Columbia Gas of Massachusetts (“CMA”) and Western Massachusetts Electric Company (“WMECO”) engaged CET to go door-to-door in the target neighborhood. CET, in turn, subcontracted with Clean Water Action to canvas door-to-door. Canvassers reached almost half the residents in the target neighborhood and about 270 customers indicated interest in scheduling an assessment. Home assessments have been, and continue to be scheduled. Canvassers confirmed that tenants are reluctant to provide their landlords’ contact information to allow contact regarding participation in Efficient Neighborhoods+. CMA worked with CET to collect contact information for landlords through public records and followed up with letters targeted to landlords to inform them of the special offer. There has been a good uptake in interest and audits scheduled. CMA and WMECO will also evaluate the success of the door-to-door effort by any increases in closure rates. Overall outreach efforts to-date include:

Direct Mail

- Customer letter: sent to all eligible WMECO and CMA customers in the target neighborhood of West Springfield in June to announce the launch of Efficient Neighborhoods+.

Outreach

- Outreach to Town of West Springfield, Office of Economic Development
- Visit with Assistant Economic Development Coordinator, Town of West Springfield to introduce and explain the initiative
- Neighborhood leaflet drop
- Neighborhood Canvassing
- Follow-up with customers by Outreach vendor
- Placement of lawn signs in the yards of participants

G. Efficient Neighborhoods+ Evaluation

The Order states:

The report should also include: (1) the categories of data that the Program Administrators will track related to the performance of the Efficient Neighborhoods+ initiative in overcoming participation barriers, and how the Program Administrators will assess the effectiveness of the initiative in overcoming the barriers.

Order at 47.

Phase 1 – Evaluation Planning and Readiness

Establishing baselines against which the success of the initiative will be measured is critical for a rigorous and meaningful evaluation. Since the Efficient Neighborhoods+ initiative builds upon

the existing HES initiative, most PAs will establish baselines using past HES activity in the Efficient Neighborhoods+-targeted community, as well as HES activity (past and Efficient Neighborhoods+-concurrent) in comparison communities. As part of the process of establishing baselines, the evaluation will include the following indicators of program activity:

- Number of initiated contacts⁴
- Number of completed audits
- Number of completed or committed projects
- Energy savings from completed or committed projects

While a core goal of the Efficient Neighborhoods+ initiative is to increase participation (*i.e.*, number of completed projects) in HES, the initiative implementation period for most PAs (May-June through November, 2013), might be too short to fully gauge its success in driving participation. Since HES is the energy assessment and weatherization initiative, it takes time to complete and invoice a project. Including other indicators, such as the number of completed assessments, or number of initiated contacts, will allow the evaluation to cover a comprehensive representation of the effects of the initiative.

In addition to the above-mentioned indicators of program activity, as part of the analysis, the evaluation will also look at the differences in the adoption rates of specific measure categories. As part of this analysis, the Evaluators will select and group specific measures into categories in a meaningful way (*e.g.*, insulation, boilers and furnaces, early refrigerator retirement, lighting, etc.) and develop a list in adoption of each measure category. The Evaluators will work closely with the PAs to determine the final measure classification and measure list.

For most PAs, to analyze program effectiveness, the evaluation will employ a quasi-experimental research design known as “difference in differences.” For each success indicator (initiated contacts, completed audits, etc.), the percent change will be calculated between the past activity (pre-period) and Efficient Neighborhoods+ activity (treatment period).⁵ Also, the percent change will be calculated separately for the Efficient Neighborhoods+ -targeted communities and the comparison communities. The difference between the percent change observed in the Efficient Neighborhoods+ community and the comparison community will be calculated. The table below presents a hypothetical example of the analysis using completed projects as an indicator.⁶ This analysis will be performed as part of Phase 2 of the evaluation research (described below).

⁴ Initiated contacts are customers who first contacted or were first contacted through the HES program during the Efficient Neighborhoods+ implementation phase.

⁵ Note that eligible customers will be used as the base for calculating activity rates, be it initiated contact rate, audit rate, project completion rate, etc. That is, customers with low-income rate codes and customers residing in multi-family (5+ unit homes) will be flagged and eliminated from the eligible pool of customers. Completed audits, projects, and the resulting energy savings will be determined using project initiation date. That is, only audits, projects and energy savings that were initiated within the timeframe of interest (past and Efficient Neighborhoods+-concurrent) will be retained in the analysis.

⁶ Note that when analyzing the energy savings data, the savings will be normalized by the total number of customers. Savings will be calculated per customer in the pre- and post-period for both the Efficient Neighborhoods+ and comparison communities. The “difference in differences” approach will be employed to

Table 1. An Example of the Analysis Output

	Total Number of Eligible Customers	Total Number of Completed or Committed Projects		Completion Rate		Difference in Project Completion Rate (Percent Lift)	Number of Incremental Projects (Percent Lift)
		Pre Period (June-November, 2012)	Treatment Period (June-November, 2013)	Pre Period (June-November, 2012)	Treatment Period (June-November, 2013)		
Comparison Community	938	70	90	7%	10%	3%	27
Efficient Neighborhoods+ Community	900	65	120	7%	13%		

When establishing baselines and selecting comparison communities, the following will be considered:

Past period (baseline) selection. The baseline is set by selecting a comparable period in the past. The most relevant and comparable past time frame is June 1, 2012 to November 30, 2012. There are two major reasons for this comparison period. First, this time frame represents a comparable period of time within the year (the Efficient Neighborhoods+ initiative is being implemented from June 1 to the end of November 2013). A comparable time period is important given the variation in HES engagement and participation during summer, winter, and shoulder seasons. Second, factors outside the program’s control, such as economic conditions, could impact program activity. Thus, a more recent comparison time period will likely have more in common with the current conditions. Due to Hurricane Sandy, program participation in some communities might have been lower than it would have otherwise been in 2012. If it is determined that Hurricane Sandy heavily impacted the treatment community, a different timeframe will be selected, most likely the same period in 2011, to ensure a more accurate comparison. Each of the PAs will determine the final past period selection for each treatment community.

Comparison community selection. Following the standards of the quasi-experimental research design, matched comparison communities will be selected that are similar to the Efficient Neighborhoods+ communities in terms of geographic, demographic, household, and other characteristics, as well as past program participation levels. The use of comparison communities

estimate savings that are due to the Efficient Neighborhoods+ initiative (by multiplying the incremental savings per account by the total number of accounts).

will allow the PAs to control for a variety of factors that might impact engagement with and participation in the program (*e.g.*, improvement and downturn in the economy, growing awareness of and desire to be energy efficient, etc.).

PA customer data and available census data will be used to support the comparison community selection process. More specifically, when selecting comparison communities, the percent of customers who have low-income customer rate codes are considered. Similarly, census data will be used to ensure that the comparison communities have similar building stock and that the residents in the comparison community are similar in terms of income, age, and household size, among other characteristics.

In addition to the above-mentioned characteristics, the selection will take into account past and current exposure to the HES initiative or Mass Save program marketing and outreach. This information will be obtained from the PAs. Due to the uncertainty about customer exposure to various types of marketing and outreach,⁷ a qualitative comparison of the Efficient Neighborhoods+ and comparison communities will be made. To the degree possible, the effect of natural disasters, such as Hurricane Sandy, on the communities will be considered, since severe weather can influence participation in energy efficiency programs.

As part of the Efficient Neighborhoods+ initiative, some PAs may choose to target the entire town, while other may choose to open the initiative to the entire town, yet focus their outreach and targeting efforts on one or several census block groups within the town. If the former is the case, the Evaluators will work with the PAs to select a comparison town with similar geographic, demographic, housing, past participation, and other characteristics. If the latter is the case, there are more opportunities for selection of a comparison community. For example, in addition to selecting a comparison town, participation across Efficient Neighborhoods+ and non-Efficient Neighborhoods+ census block groups within the same town could be compared. The final approach to comparison community selection depends on the communities selected as part of the Efficient Neighborhoods+ initiative, as well as the initiative implementation strategies. At this time, the PAs plan to select a comparison community for each Efficient Neighborhoods+ community selected. Final selection of comparison communities will be made in October 2013, after receiving information on targeted communities and implementation strategies from the PAs.

Comparison cohort selection. In the treatment communities, the Efficient Neighborhoods+ initiative is open to any household in a 1-4 unit structure. However, as part of the initiative, a special emphasis is being placed on reaching and treating 2-4 unit homes. As such, when looking at the effectiveness of the initiative, it is important to look at the lift in program activity not only among all program-qualifying households, but households in 2-4 unit buildings specifically. A challenge with this analysis is that the structure type of each account is not typically tracked by the PAs. To deal with this challenge, the Evaluators have developed an algorithm that analyzes address fields and categorizes accounts into 1 unit, 2-4 unit, and 5+ unit structures, which will be used for this evaluation. To validate the accuracy of the algorithm, the PA or Evaluators will run the Efficient Neighborhoods+ participation data (that has the unit

⁷ For example, billboard advertising might not be a part of the marketing in a community, yet its residents might be exposed to it because it is placed in another community that is on their route to work.

designator for each participant) and then compare the resulting classification to the data tracked by the implementation team. This will allow assessment of the degree of error associated with the way the algorithm classifies accounts into various unit categories.

Due to unique program design elements of the Efficient Neighborhoods+ initiative by Cape Light Compact (“CLC”), an alternative method will be applied by this PA to evaluate its initiative. Reasons include:

Challenge to select a matched comparison community. CLC offers the initiative across all towns in its service territory. Furthermore, CLC’s service territory is unique in its geography, household, and customer characteristics.

Complexity to compare participation among the target segment. CLC targets a specific income group through the Efficient Neighborhoods+ initiative (customers with incomes between 61% and 100% of the state median). However, participant income levels are not tracked as part of the program tracking databases. As a result, comparisons can be made at the overall program participation level in the pre-period and the treatment period, but not among the target income customer cohort.

Given these challenges, one approach would involve matching CLC customer and participant data to income and household size data obtained from a secondary source (*e.g.*, Experian). The Evaluators could then compare the lift in activity (initiated contacts, energy assessments, participation, etc.) to a representative period in the past within the targeted segment. It should be noted, however, that this approach is imperfect because of the likely errors in matching income and household data to CLC customers and participants.⁸ If this approach is pursued, due diligence, quality assurance and validation checks will be conducted to ensure that the results are as accurate as possible. One of the checks could include validating the accuracy of the matched income data against income eligibility data tracked through the Efficient Neighborhoods+ initiative implementation.

Phase 2 – Initiative Evaluation

This phase will include primary and secondary research efforts to assess the performance of the Efficient Neighborhoods+ initiative using the success indicators defined during Phase 1. Through analysis of program tracking, marketing and outreach intensity, participation levels (audits and projects), and energy savings will be documented as a result of the initiative. Comparisons will be made using indicators of the Efficient Neighborhoods+ activity to a representative period in the past and to comparison communities. Through phone surveys, the evaluation will explore the influence of the initiative’s marketing, outreach, and design components on customers’ decision to complete an audit/installation, thus establishing attribution.⁹ Finally, the evaluation will explore the relevant process-related topics, such as reasons for participation, satisfaction with the participation process, and recommendations for

⁸ The match will have to be based on address and address generally is considered a less stable matching field.

⁹ Details around the attribution approach will be provided in a detailed scope of work following the approval of the high-level evaluation scope provided in this document.

the initiative moving forward. Depending on participation levels, primary research efforts will include interviews with participating and nonparticipating customers to support an assessment of the following topic areas:

- HES awareness and knowledge
- Sources of program information and marketing effectiveness
- Barriers to participation
- Satisfaction with the participation process
- Attribution

H. Projected Implementation Timeline for the Remainder of the Three-Year Term

Completion of the evaluation as described in the previous section will be a key element to determine the timing of further Efficient Neighborhoods+ implementation. The evaluation is expected to be complete in the first quarter of 2014. Following completion, the PAs will then examine the results and apply the lessons learned to the initiative model before they can offer an expanded version of the Efficient Neighborhoods+ initiative. Based on this timing, the PAs anticipate offering the expanded Efficient Neighborhoods+ initiative by the end of the second quarter of 2014.

I. Description of the Initiative's Projected Implementation Costs

The Efficient Neighborhoods+ initiative's projected implementation costs include marketing and outreach costs, and vendor/contractor delivery costs.

III. COMMUNITY-BASED ENGAGEMENT INITIATIVES

The Order states:

In addition, the report should also describe the status of community-based engagement initiatives that the Program Administrators intend to implement over the three-year term outside of the Efficient Neighborhoods+ initiative (see Exh. Comm-1, at 233-236). The report should include: (1) the method the Program Administrators use to select communities.

Order at 47.

A. Community-Based Engagement Selection

Community-based engagement initiatives for 2013 generally fall into three categories:

1. Low-Income Partnerships associated with the 2013 Low Income Metric # 1, as filed with the Plan
2. Strategic Partnerships
3. Solicited Proposals

Low-Income Partnerships

For the Low Income Metric #1, the PAs collaborated with LEAN and their local CAP agencies to identify community partnerships.

Strategic Partnerships

This category includes those community-based engagements where the PA has been invited to join a larger event. These include Renew Boston, Worcester Energy Residential Rebate Program, and the DOER's various Home MPG efforts. These are generally longer-term partnerships.

Solicited Proposals

The PAs solicit proposals with energy efficiency goals to drive participation within a community. These generally vary by year and have a set time period to achieve goals.

B. Community Details

The Orders seeks:

[T]he communities selected, and the design elements, technologies, participant incentive structures, delivery mechanisms, and marketing strategy for each community.

Order at 47.

1. Low-Income Partnerships

The following communities have incentives that generally do not require a co-pay from the residents. The delivery of these services is described in the Plan in the Low-Income Single Family initiative.

Haverhill

National Grid worked closely with its lead agency, Action Inc. and its CAP agency, Community Action Inc. ("CAI") to develop a marketing and outreach plan designed to increase awareness and program participation of income eligible customers in the town of Haverhill. A list of 3,290 eligible customers on the discount rate was defined. A direct mail piece was mailed and an email blast was sent to eligible customers on the discount rate that live in single family dwellings with 1 to 4 units who have not participated in the program in the past.

Somerville

NSTAR Electric and NSTAR Gas continue to partner with Tri-City Community Action Program, Inc. to increase program participation of income eligible customers in the city of Somerville. Energy efficiency outreach efforts include targeted direct mail campaigns to customers on the discount rate in Somerville that live in single family dwellings of 1 to 4 units and have not previously participated in the Energy Efficiency program. Additionally, NSTAR Electric and

Gas is working closely with their lead vendor, Action for Boston Community Development, to research, target and propose energy efficiency upgrades to multi-family facilities located in Somerville with at least 50% occupancy of income eligible customers.

Springfield Vietnamese Community

Together, CMA and WMECO have partnered with Springfield Partners of Community Action (“SPCA”) and the Vietnamese American Civic Association (“V.A.C.A”) to create awareness and increase participation in the Low-Income program for the residents of the Forest Park neighborhood in Springfield, Massachusetts. Forest Park is considered a hard-to-reach community because of the high population of Vietnamese residents and the historically low program participation rates.

Part of the effort includes “Sunny Wednesdays.” Every Wednesday in the summer, weather permitting, SPCA hosts an information table at the V.A.C.A facility to increase awareness of energy efficiency programs in the Vietnamese community. SPCA is able to promote energy efficiency and other programs, such as fuel assistance and utility discount rates.

Turners Falls

During the second quarter of 2013, Berkshire Gas worked closely with its CAP agency, Community Action (“CA”) to develop a marketing and outreach plan designed to increase low-income program participation in the town of Turners Falls by 5%. CA has generated a list of 165 Low Income Home Energy Assistance Program eligible households in Turners Falls and has prepared a mailing to reach out to these households. Natural Gas heated multifamily buildings have also been targeted for service in 2013.

2. **Strategic Partnerships**

Nantucket

National Grid continues its partnerships with the Nantucket Energy office to drive more participation in the HES initiative.

Home MPG

CMA, National Grid, and WMECO, all continue their partnership with the DOER in the Home MPG initiative to drive more participation in HES. The following Western Massachusetts towns are participating in this initiative: Belchertown, East Longmeadow, Hampton, Monson, Palmer, Wilbraham, Springfield and Longmeadow.

Renew Boston

National Grid and NSTAR have partnered with the City of Boston to launch a Triple Decker initiative to attract more landlords and 2-3 unit homes to participate in the HES initiative. A launch event was held at a customer’s home in Jamaica Plain along with a day of action on June 1 designed to drive customers to sign up for the initiative.

Worcester

NSTAR and National Grid are partnering with the City of Worcester to promote weatherization awareness and installations to the non-low-income and low-income communities in support of the City of Worcester's climate plan. NSTAR and National Grid met with the key community stakeholders, low-income agency and Green Justice Coalition representatives to discuss energy efficiency outreach opportunities. The City of Worcester is also looking at various opportunities for enhanced incentives to drive participation.

3. **Solicited Proposals**

Medford and Swampscott

As winners of National Grid's first communities partnerships Requests for Proposal, Medford and Swampscott continued to work toward their goals of increasing participation in residential programs by 25%. Particularly successful in Medford was a call to action to get a home energy assessment that was included in all residents' water bills from the city.

Somerville and New Bedford

Earlier in 2013, NSTAR's community based outreach initiative assisted the City of Somerville and the City of New Bedford with their ongoing energy efficiency outreach efforts. Going forward, all community based outreach will be managed at the program level and several community organizations that have participated in our Community Based Outreach and Community Mobilization Initiatives are excited to renew relationships at the HES level.

Wellesley

National Grid and the Wellesley Municipal Light Plant wrapped up their "Power to Save" campaign with the town's energy committee, successfully driving 222 energy assessments.

C. **Performance Data**

With respect to the community-based engagement initiatives, the Order asks for:

[T]he categories of performance data that the Program Administrators intend to track and the manner in which they will assess the effectiveness of the initiatives in overcoming the identified residential barriers.

Order at 47.

With respect to the community-based engagement initiatives, the PAs use these initiatives to develop relationships with community groups. These partnerships provide qualitative benefits, including community goodwill, broader awareness and understanding of energy efficiency, and solidified relationships with community organizations and citizens. PAs also look at participation rates in the HES initiative, and can quantify the effectiveness of the initiatives in

overcoming residential barriers by comparing post-initiative participation rates to prior year or an appropriately determined timeline for baseline analyses. The PAs also recognize that some of the benefits from these HES initiatives may not be immediately quantifiable. However, it is expected that over the long-term, these outreach efforts will have directly contributed to greater program awareness and program participation rates.

D. Projected Implementation Timeline for the Remainder of the Three-Year Term

The PAs have a set timeline for the Low-Income metric #1, and the implementation timeline will match the set dates. As stated in the metric, (1) the Program Administrators were to submit a marketing plan to the Energy Efficiency Advisory Council (“EEAC”) Consultants and DOER by May 1, 2013, (2) in coordination with LEAN, each Program Administrator was to implement its marketing strategy plan within its respective territory no later than August 1, 2013, and (3) by February 1, 2014 there PAs are to present a report to the EEAC Consultants and DOER that includes individual Program Administrator’s participation rates, a summary document of Program Administrator’s production, lessons learned, and recommendations for future marketing strategies; each PA is to submit a memo to EEAC consultants and DOER by February 15, 2014 detailing their Clear and Distinct Role in accomplishing this activity.

The strategic partnerships will depend upon timelines of the outside initiatives. For example, DOER has set timelines through the Department of Energy that will determine the length of time for the strategic partnership.

As noted above, there are numerous community outreach initiatives in process. Each of these initiatives has unique design and implementation attributes associated with them. The PAs also recognize timelines for these efforts may vary across calendar years but are committed to continue seeking solicitations and opportunities for these outreach efforts for the remainder of the Plan.

E. Description of the Initiatives’ Projected Implementation Costs

The Community Based Engagement initiative’s projected implementation costs include marketing and outreach costs and vendor/contractor delivery costs.

IV. RESIDENTIAL LANDLORD/TENANT BARRIER

The Order states:

With respect to the residential landlord/tenant barrier, the report should describe: (1) the strategies that the Program Administrators intend to employ to address this barrier (including, but not limited to marketing and outreach to landlords and property owners, and enhanced incentives packages for multi-family properties).

Order at 47.

In the Plan, the PAs have continued to employ strategies to overcome the residential landlord/tenant barrier. As described above, PAs have created marketing materials and outreach

targeted specifically for landlords and property owners. This is coupled with an enhanced incentive package for multi-unit properties, as described above.

Additionally, National Grid and NSTAR are participating in a triple-decker effort with the City of Boston to launch a Triple-Decker initiative to attract more landlords and 2-3 unit homes to participate in the HES initiative. A launch event promoted by the Mayor's Office was held at a customer's home in Jamaica Plain along with a day of action on June 1 designed to drive customers to sign up for the initiative.

Also, as discussed above, through the Efficient Neighborhoods+ initiative, the PAs are testing a variety of strategies by offering enhanced and packaged incentives to entice landlord and tenant participation in 2-4 family homes.

PAs intend to explore alternative strategies and educate themselves on ways to engage landlords as well as tenants to participate in HES moving forward.

- Some examples of actions to explore such strategies are: At the August Residential Barriers Working Group Stakeholder session, the PAs engaged Paul Gromer of Peregrine Energy, and an EEAC member to present information on data sets to determine the likelihood of customer participation. (See Attachment A).
- At the September Residential Barriers Working Group Stakeholder session, LEAN led a discussion on various strategies utilized in the income eligible program, which it has deemed successful in encouraging landlords to participate. (See Attachment A).
- The PAs plan at the October 2013 Residential Barriers Working Group session to have Green Justice Coalition, Mass Energy, and Renew Boston staff speak about their landlord tenant engagement strategies that are part of their current implementation efforts.

From each of these informational sessions, as well as Efficient Neighborhoods+ results, the PAs will determine any best practice efforts/strategies moving forward to help overcome landlord tenant barriers.

A. Projected Implementation Timeline for the Remainder of the Three-Year Term

Based upon the evaluation of Efficient Neighborhoods+ and the Triple Decker Initiative in Boston, the PAs will continue to work on overcoming the tenant/landlord barriers. The results of these initiatives will help to determine the timing and the effectiveness of current efforts and influence those of the future. The PAs expect to continue to address tenant/landlord barriers through Efficient Neighborhoods+ as well as any other identified opportunities.

B. Description of the Projected Implementation Costs

The Residential Landlord/Tenant Barrier initiative's projected implementation costs include marketing and outreach costs, as well as vendor/contractor delivery costs.

V. PRE-WEATHERIZATION BARRIER

The Order states:

Finally, the report should include a detailed description of the strategies that the Program Administrators have developed to address the pre-weatherization barrier. The report should discuss whether these strategies will be pursued through the Efficient Neighborhoods+ initiative, the community-based initiatives, or other mechanisms, and should include a projected implementation timeline for the remainder of the three-year term, as well as a description of the projected implementation costs.

Order at 48.

After review of the Pre-Weatherization Evaluation that was completed in early 2013, the Program Administrators elected to offer up to three of the following incentives:

Eligible Barrier	Incentive: 100% of the Cost up to
Knob & Tube Wiring Evaluations	\$250 maximum rebate
Combustion Safety Evaluation and Repair to Eliminate High Carbon Monoxide Levels	\$300 maximum rebate
Dryer Venting Replacement/Installation/ Repair	\$250 maximum rebate

These pre-weatherization incentives were designed to eliminate low-cost barriers. The knob and tube wiring evaluation is designed for those customers that would like to confirm that their wiring is not live so they can proceed with the recommended insulation measures instead of mitigating live wiring, which can be costly. Based upon the evaluation, the PAs chose to allow up to three barriers to be addressed with these incentives in order to greatly increase the likelihood that the recommended weatherization improvements are completed.

The pre-weatherization incentives are offered as a standard offer starting in the second quarter of 2013 until the end of the year. The PAs will review the costs and benefits for this 2013 initiative to determine a future implementation timeline. As long as these incentives continue to overcome obstacles to participation in the HES initiative, the pre-weatherization incentives will continue to be offered.

A. Description of the Projected Implementation Costs

The Pre-Weatherization Barrier initiative’s projected implementation costs are comprised of the incentives for pre-weatherization barriers.

VI. SUMMARY

The Program Administrators have sought to address barriers to acquiring additional cost-effective energy efficiency resources through developing strategies and initiatives designed to address the landlord/tenant barrier, the pre-weatherization barrier, a lack of customer awareness of energy efficiency programs, the cost of participating in energy efficiency programs, and hard-

to-reach customers. An important element of these strategies was the meetings of the Residential Barriers Working Group, which has provided a valuable forum for developing relationships, especially between the PAs and external stakeholders. The Residential Management Committee of the Program Administrators intends to continue convening the working group to develop these relationships further and provide an opportunity to discuss how the PAs might refine the residential energy efficiency programs to encourage program participation by all customers. Currently, an October meeting is planned to discuss the results of the various initiatives discussed in this report. Additionally, a future meeting will take place by the second quarter of 2014 to discuss the evaluation results of Efficient Neighborhoods+. The Program Administrators will continue efforts to mitigate barriers throughout the three-year term, with a focus on the Efficient Neighborhoods+ initiative, community-based engagement initiatives, and landlord/tenant and the pre-weatherization barriers.

ATTACHMENT A - RESIDENTIAL BARRIERS WORKING GROUP MEETING MINUTES

1. Meeting of March 27, 2013

Attendees and Minutes of March 27, 2013 RBWG Meeting

Lyn Huckabee, DOER
Jeremy Shenk, Green Justice and Community Labor United
Amy Vavak, representing Pen Loh, Renew Boston, Mass Energy Consumers Alliance
Alissa Whitehead, DOER
Matt Saunders (phone) Attorney General
John Livermore, EEAC consultant
John Howat, NCLC
Debra Hall, DHCD
Jerry Oppenheim, LEAN

Liz Cellucci, Columbia Gas
Trish Walker, New England Gas
Leah Berger, Columbia Gas
Mike Sommer, Berkshire Gas
Beth Lonergan, National Grid
Margaret Song, Cape Light Compact
Tom Palma, Unitil
Tami Buhr, Opinion Dynamics
Kessie Avseikova, Opinion Dynamics
Emmett Lyne, Rich May
Charlie Olsson, Northeast Utilities
Melanie Coen, National Grid

12:37, Meeting Begins

Introductions

PA Presentation

Liz C. presents a summary of the DPU order. DPU was invited to this meeting and we provided them with an agenda.

Beth L. discusses criteria for selecting communities for the Efficient Neighborhoods+ initiative and that the PAs have had in depth discussions of potential methodologies. To make sure all PAs are accommodated, Opinion Dynamics were involved in this process.

Kessie A. and Tami B. from Opinion Dynamic discuss their approach to the community selection methodology.

Beth L. discusses low income (LI) coordination and the importance of maintaining the LI process and coordinating with Efficient Neighborhoods+. For example, a fact sheet will be developed with LEAN to distribute to LI eligible customers. Field staff will make efforts in each home to identify customers who qualify for LI services.

Charlie O. discusses proposed incentives for Efficient Neighborhoods+. These incentives will address the following, which are outlined in the Three-Year Plan.

Pre-weatherization

Going deeper

Working poor

Landlord barriers

Whole house

Packaged incentives

Program integration

Trish W. discusses marketing strategies and the plan to focus on the uniqueness of each community and to target marketing strategies effectively.

Margaret S. discusses the delivery process and how it ties to the current HES model. Margaret notes how the initiative timeline is being moved back a month.

Questions and Discussions

Debra H. asks if candidates will receive the statewide approach to Efficient Neighborhoods+ all at once or on a rolling basis.

Margaret S. says step 2 in the process will be to layer on past participation. Fits in with what we're doing,

Beth L. says we want to screen against LI customers and if there is a high quantity of LI within a community, we do not want to target that community.

Alissa W. comments that if a high LI population and high Efficient Neighborhoods+ population can really work together to maximize outreach efforts.

Margaret S. says we can get the most recent LI data through rate codes.

Lyn H. asks how long the second part of the analysis will take and Beth L. answers it will take place immediately. Liz C. says that if everyone here agrees with the methodology, then we will proceed.

Tami B. states not everyone who lives within the 112 identified towns live within target neighborhoods and that these neighborhoods are smaller areas within a town.

Debra H. says she loves what the PAs and Opinion Dynamics have come up with and that is systematic as a business plan. However, she thinks this is also a chance to be opportunistic. She thinks we should combine both approaches in year one. She calls this a synergistic approach. As part of our marketing strategy, the PAs should talk to local communities to see if there are other "green" initiatives going on that will build momentum. Debra suggests Gateway Cities, Green Communities Grants, and CDBG and says she can help ascertain a list of initiatives. Lyn H. says Sunshot comes to mind, which is sharing solar on municipal properties and that it's a way for municipalities to engage with residents.

Debra H. also says she wants to understand that in the future, this offering will be on a matrix and will have a mix of income levels. For example, if a customer signs up for Mass Save, they can be served under a different program. HES vs. Low Income vs. Efficient Neighborhoods+.

Charlie O. responds that part of the Efficient Neighborhoods+ concept was to add many of these approaches and that once we pick communities we will see what else is out there that we can piggyback on.

Lyn H. asks how many communities we anticipate we will engage within this time period and in the future.

Charlie answers NStar and WMECO – 2-3 communities

Beth – National Grid same as NStar

Margaret S. – CLC hasn't decided

Liz C. – Columbia Gas will target 1 community during initial timeframe. After figure out what kinks are moving to other communities

Alissa W. asks if there is overlap among the PAs and if they are going to pick communities based on heating source. Beth L. answers that we are not going to pick communities based on heating source.

Amy V. says the structure is good and it hits on the issues Charlie outlined. She is curious if any thought has been given to how the Efficient Neighborhoods+ will interface with community outreach initiatives and if they will be dealt with holistically as opposed to in a siloed approach.

Amy V. explains that a siloed approach means going from one initiative to another instead of at the same time and working together.

Charlie answers that it depends on the community. The PAs don't know at this point if there is an existing community group.

Jeremy S. mentions he is more interested in the core part of how the outreach happens and not with what the outreach methods are. It is helpful to have a trusted language speaking resource to get over barriers.

Liz C. agrees with Jeremy and says she thinks it is efficient to use existing lead vendor and sees the PAs finding traditional community organizers who are out in the community. Community engagement is essential to Efficient Neighborhoods+, but community engagement is essential no matter what program.

Jeremy S. is excited about pre-weatherization, especially the incentives. He notes it is “ground breaking stuff.” He goes on to say community outreach and municipality leadership should be part of the selection criteria. He doesn't want us to only serve a certain census group if the whole city qualifies.

Charlie O. responds the PAs can look at a city or a section of a city and that the PAs don't want to go into a city that is all LI. He says the savings for this initiative need to be successful and that it is part of the HES program. The model will help the PAs go into different neighborhoods of a city.

Debra H. comments that in the long run, if the program is a success, it will be part of a continuum, but since this is the first time implementing the program, communities that are likely to succeed should be chosen.

Jerry O. comments that LEAN appreciates the hard work. He says everyone has experience coordinating programs and that Charlie makes a good point that we have an opportunity to come together with Efficient Neighborhoods+ and the Low Income metric because we can pick communities. He says no area is only Low Income. He says there may be customers who are between being financially challenged and Low Income who can't afford the enhanced incentives. He asks are the percentages correct and will customers fall between the cracks. He says we need

to work together to deliver a program that looks like a Low Income program to customers in this income level.

John H. comments that good thought went into the program design and thanks the PAs. He follows up on Jeremy's point to identify a point of contact within the community. He thinks by way of methodology the PAs need to stress the importance of outreach efforts because in getting down to census tract level, we have to use 5-year floating ACS data, which is statistically reliable, but creates an issue with mobile target populations. He also says income levels change quickly. He mentions he looks forward to working with PAs to develop an outreach script.

Jeremy S. has a thought on the community criteria, which is that it is good there is a robust overlap with Environmental Justice (EJ) communities, but what is the remaining 40% that didn't meet EJ criteria.

Charlie O. responds that the tool gives us the ability to cross over gateway cities, EJ communities, and zip+4.

Trish W. comments it is the reality that these are our customers. She says the PAs know their customers and understand transient communities and unemployment rates and that they are sensitive to making sure they are serving customers and are attuned to what is going on in their communities.

Lyn H. is awe struck by Charlie's incentive slide. She asks if the pre-weatherization barrier incentive is zero and Charlie answers the PAs stopped offering this incentive after September 2012. The PAs thought it was appropriate to put in the Efficient Neighborhoods+ initiative because of the housing stock.

Lyn H. asks how this will fit in with Renew Boston.

Amy V. adds the Renew Boston brand is still present and promoting Mass Save.

Charlie O. responds the goal is to incorporate the Efficient Neighborhoods+ incentive package in the Renew Boston program.

Amy V. adds the state is a proponent of a statewide initiative.

Amy V. brings up a challenge Renew Boston had with landlord/renter marketing where one of the families in a triple decker is LI and other two are not. There is a barrier moving the family to the LI program. She asks if Efficient Neighborhoods+ will serve the low income unit in a triple decker.

Beth L. and Margaret S. say they will have to be served by the LI program and Amy replies that sometimes customers will just not go through the LI program.

Lyn H. asks if one program would serve the whole house and then the costs and savings could be divvied up.

Tom P. says we can't force someone to apply.

Charlie says we have to do a better job getting these customers enrolled.

Margaret says if a customer is on a discount rate, they would have had to ask at some point.

Regardless of the LI program, some customers just don't want to participate. She reiterates we can't force customers to participate.

Beth says this warrants further discussion and the discussion of landlord/tenant barriers can be addressed in the report back to the DPU.

Tami says with the tool, PAs can identify the prevalence of this issue with rate code data, so we can identify neighborhoods we may run into this issue. Kessie adds we can have readily available addresses that have this issue.

Matt S. refers to slide 9. He wants to know some examples of towns that are not EJ communities or gateway cities, but still fit criteria of community selection.

Margaret S. responds that Barnstable is CLC's only gateway city.

Charlie says Boston is not a gateway city and Jeremy says there are EJ communities within Boston.

Matt S. asks if Dedham is one of these communities and Liz responds that 11.4% of Dedham is an EJ community. She says we can through the analysis and better answer his question.

Emmett L. adds that many towns in western Massachusetts may be an example of communities that are neither EJ nor gateway communities.

Matt S. refers to slide 14 and asks what the thought process was with regards to increasing refrigerator rebates from \$150 to \$200.

Charlie O. responds it is to encourage people in multifamily homes to replace their refrigerators. He notes landlords typically replace on failure, so trying to get landlords to replace earlier is the goal.

Matt S. asks why the PAs chose what we did with regards to insulation.

Charlie O. replies it's because the PAs want landlord have skin in the game instead of it being 100% covered like in the LI programs. The PAs feel 90% is a great offer. Liz adds if we change it, we would have to recalculate cost-effectiveness.

Matt S. thinks if PAs can get someone to insulate, then a lot of money can be saved, so if the PAs can fully cover the insulation, why don't they?

Charlie O. notes some stakeholders have accused the PAs of being too generous and that an extra \$500 is a significant contribution for replacing heating systems.

Lyn H. adds that from the DOER's perspective, the question is if handing people more money or making customer's have more skin in the game is more effective. She thinks this package is a good way to ask this question and find out.

John L. asks how the enhanced incentive totals were calculated and Charlie replies it is the average historical cost for this type of building structure.

Debra H. says some people say this type of group is less likely to use heat loans and asks in conversations with banks, have any discussions been had that banks will step up credit enhancements.

Charlie O. replies NU hasn't approached banks, but at a Chelsea event, the Chelsea Bank expressed interest in doing this type of thing.

Jeremy S. says community and municipal leaders may be willing to sit down with banks.

Margaret S. says even through targeting 60-100%, there will be outliers.

Jeremy S. comments he is concerned that if this program isn't successful right away, then PAs may scale back. He says it's important to figure out what didn't work and make improvements. He is assuming the RBWG is where stakeholders can give input.

Charlie O. proposes this is a starting point and PAs will use lessons learned to improve.

Lyn H. suggests adding a slide that maps the pieces of the CMIs that were done in the first three year plan including lessons learned and to bring this into what PAs are doing with Efficient Neighborhoods+. She wants to have a better understanding of the lessons learned.

Margaret S. emphasizes the importance of the need for a target audience when creating this slide and Lyn says the secretary and Megan Shaw from Cambridge Energy Alliance would be interested in seeing it.

Charlie notes the PAs will look at the recommendations made by Cadmus in the CMI evaluation to see how they align with the design of Efficient Neighborhoods+.

Emmett L. says at the end of the day, the PAs have a report due to the DPU on 9/30.

Jeremy S. says it was a benefit to have a community outreach person to help meet goals when there was a target on 5-20 unit buildings. As this program moves forward, PAs must be transparent in our lessons learned.

Beth L. says how we leverage outreach is important as is the need for customers to go to the right place, education, and how the message is delivered.

Debra H. asks if owner occupied is a criteria and ODC replies it is.

Debra H. wants PAs to measure why they are not getting uptake in participation in regular residential programs in non Efficient Neighborhoods+ communities that still meet Efficient Neighborhoods+ criteria.

Jeremy S. wants to be able to make a regional case.

John H. discusses landlord/tenant barriers and notes in some communities around the country, codes and standards are a way to overcome this issue. He asks if this group is interested in exploring this.

Emmett replies that codes and standards are a separate section in the three-year plan and if this group takes it up, we may butt heads with others who are working on it.

Lyn H. says it may be worth a thought to see what can be done to coordinate efforts, but doesn't think this is the right audience.

Next Steps/Action Items

The RBWG wants approval on its proposed community selection methodology and incentive package, so it can begin selecting communities.

Lyn H. is interested in seeing how the methodology played out with the community selection choices, but overall the methodology looks solid.

Everyone approves the methodology and incentive package.

Action Items:

Beth will schedule a conference call to talk about the pre-weatherization barrier evaluation within a month.

Put together a one-pager describing how the CMIs were implemented in the previous three-year plan, lessons learned, the Efficient Neighborhoods+ design, and what overlaps and what is different.

Follow up with Matt S. and identify which towns are not in the 60% overlap with EJ communities.

Figure out the working relationship between Efficient Neighborhoods+ and the Low Income metric.

Further discuss Amy's V. issue pertaining to one Low Income unit in a three unit building.

Develop outreach and marketing materials for Efficient Neighborhoods+. The RBWG will reach out to stakeholders for input that makes practical sense.

Meeting adjourned 2:39

2. Meeting of May 1, 2013

MAY 1, 2013 MEETING PARTICIPANTS

In person

Charlie Olsson & Kristin Rusk (NSTAR)
John Livermore (Consultant Group)
Beth Lonergan (National Grid)
Margaret Song (Cape Light Compact)
Tom Palma (phone) (Unitil)
Mike Sommer (Berkshire Gas)
Liz Cellucci & Leah Berger (Columbia Gas)
Trish Walker (New England Gas)

Via phone

Matt Zenni (New England Gas)
Riley Hastings (NSTAR)
Mike Goldman (NSTAR)
Eric Belliveau (Consultant to EEAC)
Matt Nelson (NSTAR)
Matt Saunders (phone) (Attorney General and EEAC Councilor)
Amy Vavak (phone) (Mass Energy)
John Howat (phone) (NCLC)
Emmett Lyne (phone) (Rich May)
Lyn Huckabee (phone) (DOER)
Jerry Oppenheim (phone) (LEAN)
Penn Loh (phone) (EEAC Councilor)
Debra Hall (phone) (DHCD and EEAC Councilor)
Jeremy Shenk (phone) (Green Justice Coalition)

10:00am - 11:00am: RBWG Stakeholder Session

Call-In: (866) 844-9417 Code: 89130585

MEETING MINUTES

May 1, 2013 RBWG Meeting

Topic: Stakeholder Call

Update on Pre-Weatherization evaluation results (30 min) Matt Nelson, Riley Hastings & Michael Goldman

Preliminary findings that have been submitted in the 3 year plan and have been since expanded Study to help reduce the barriers – low cost pre-weatherization barriers on the residential side

Knob and Tube Wiring

General Combustion Safety

Improper Dryer Ventilation

21% of people who were offered the initiative accepted

This offering is broken down by PA and barrier

Reasons for not accepting the offering:

Cost

Timing

Found less expensive contractor

From the turn-key effort - other projects took priority

Free Ridership

Some people took the money and did not move forward with any projects (for the turn-key effort)

28% took the money

Lyn Huckabee thought the pilot was designed so people could not take the money and not install weatherization projects

Lesson Learned:

Need to include this on a contract outlining installation of major measures after barrier is cleared to avoid “free ridership”

Recommendations from evaluation

Some PAs had 30 days while others had 90 days in the initial “testing” period

Recommendation to compromise a timeline for the future offering timeline

Beth Lonergan (representing the PAs) – Moving forward:

We will proceed with offering incentives for multiple barriers, whereas in the pilot we only offered incentives for 1 barrier.

One recommendation for Pre-Weatherization by evaluation was that we should have a consistent timeframe to submit documentation that customers have cleared barrier. Some PAs had 30 days and some had 90 in pilot. The PAs will have the timeline be 60days.

Last, we are now going to cover 100% up to \$250 or \$300 depending on barrier and incentive level rather than the 75% that was offered during the pilot.

Launching May 1, 2013.

John Livermore wants to know how to deal with live wires?

Home energy specialists are not checking every live wire - electrician’s job

CLC was making recommendations to customers that they may have low cost barriers based on the assumption – may not always be the case

Jeremy Shenk requested copies of the recommendations for his team. The report should be finalized soon.

Announcement of Town Selection for Efficient Neighborhoods+ Initiative (30 min)

The PAs announce their towns selected for this initiative

As of right now the PAs have not reached out to their towns. Town selection could change based on reaction of each municipality. Crucial to have municipalities agree to the initiative from the beginning.

Efficient Neighborhoods+ (particular neighborhoods):

Each PA's identified towns that they will begin to work with:

National Grid: Lowell (Duel Fuel Territory)

NSTAR/Northeast Utilities: Partner with National Grid in Watertown

NSTAR/Northeast Utilities: Hyde Park and Plymouth (Duel Fuel Territory)

WMECO/Northeast Utilities: Partnering with CMA in West Springfield

Berkshire: Partnering with National Grid in North Adams and Adams

New England Gas: Partnering with National Grid in Fall River

Cape Light Compact: Truro (relatively small so they will most likely do all of the town)

Unitil: Townsend

PAs want to start slow

Tweak based upon the lesson learned

PAs will be continuously review the programs to involve cities and town

Emmett Lyne suggests that the PAs draft a script for this initiative so all towns receive the same information

Penn would like to know if there was a consistent analysis used to pick our towns and cities

Opinion Dynamics presented a consistent methodology and assisted in targeting the best cities and town for this initiative

He wants to keep the list evolving and include cities and town that are interested

Deborah mentions that between all the PAs we got three green communities

Lowell, Truro & Adams

John Livermore connected with Tyler Studds from Mass Solarize program from Clean Energy Center as part of the Green Communities Division at DOER...

Creating a community energy strategy document he will share with RMC

Action Item: (from previous RBWG meeting)

Matt Saunders referred to slide 9. He wants to know some examples of towns that are not EJ communities or gateway cities, but still fit criteria of community selection.

Beth Lonergan: Some towns are included in criteria for community selection

Example: Adams, Barnstable, Beverly, Bourne, Billerica & Pittsfield

Action Items:

PAs to develop some general talking points about Efficient Neighborhoods+ for communities who are interested in future participation.

For example, Jeremy Shenk said his group will be doing "tours" of communities and they wanted to discuss this initiative at a high level. For communities who weren't selected, but are interested in future participation, we need to have consistent talking points. To satisfy this request, the PAs will need to develop a script for how to contact us with interest as a potential future participant. Jeremy Shenk to identify community groups in the communities noted today

Meeting Adjourned at 10:40 am, May 1, 2013.

3. Meeting of August 27, 2013

The Residential Management Committee
Residential Barriers Working Group
Tuesday, August 27th
Columbia Gas of Massachusetts, Westborough, MA
1:00pm-3:00pm

Meeting Attendees:

Beth Lonergan (National Grid)
Emmett Lyne (Rich May -- phone)
Kristin Rusk (NU - NSTAR)
Charlie Olsson (NU - NSTAR)
Elizabeth Cellucci (Columbia Gas of MA)
Michael Sommer (Berkshire Gas)
Trish Walker (New England Gas)
Margie Lynch (EEAC Consultant)
Charlie Harak (National Consumer Law Foundation)
Margaret Song (Cape Light Compact)
Tom Palma (Unitil)
Melanie Coen (National Grid)
Amy Vavak (MassEnergy)
Lyn Huckabee (DOER)
Alissa Whiteman (DOER)
Debra Hall (DHCD)
Paul Gromer (Peregrine Energy Group)
Jeremy Shenk (GJC)

Agenda:

Landlord-Tenant Barrier discussion (60 min)

Recap of what PAs have done to address barriers to date

What PAs are doing in Efficient Neighborhoods+

Triple Decker Initiative - Renew Boston

Communities Initiatives (60 min)

Efficient Neighborhoods+ Progress to Date

Pre-weatherization Uptake to Date

Next Meeting Dates

Welcome and Introductions

- Meeting begins at 1:10pm
- Everyone went around for introductions

Goals for today

- PAs plan to submit their report to the Department by September 30, 2013

Update on Efficient Neighborhoods+

- Margie Lynch asks for percentage breakdowns by town participation percentages
- Columbia Gas of MA, Liz Cellucci
 - o West Springfield has the highest rate of participation based on home energy audits as of July 31, 2013
 - o These numbers are not the number of people who have done any measures
 - o Clean Water Action is doing the door-to-door knocking, PAs for W. Springfield are paying
- Adams & North Adams, Michael Sommer
 - o Marketing was done at all community events
 - o Adams & North Adams gained high visibility from local newspaper
 - o Local radio stations advertise as well
 - o PAs further insights and opted in to other opportunities that were presented
 - Secondary benefits
- New England Gas, Trish Walker
 - o Eligible customers is the total number of houses in the city of Fall River
 - Reached out to all customers, want to serve everyone who is interested
 - This is different in that there are not just focused neighborhoods
 - o Utilized multiple channels of marketing
 - Radio, community events, print ads delivered to school, Facebook, table top set up in government center engaging customers
- “Lessons Learned” have yet to be noted
 - o Too premature in Efficient Neighborhoods+
- Northeast Utilities – NSTAR, Charles Olsson
 - o Share Watertown with National Grid
 - o Hyde Park and Plymouth combined have a higher participants rate
 - o Charlie Olsson shares marketing collateral for Watertown, Plymouth and Hyde Park
 - Each town is exploring different marketing looks
 - CSG designed marketing pieces
- Lowell, Beth Lonergan
 - o Direct mail marketing

- Cape Light Compact, Margaret Song
 - o Will be doing income verification, at time of the call they send out packet for customers to fill but will offer to all that qualify in Cape Cod and Martha's Vineyard.
 - o Will launch program in the Fall 2013
- Unitil – Townsend
 - o Will be launching effort in September 2013

Update on Communities

- Renew Boston
 - o Northeast Utilities – NSTAR & National Grid
 - o 3 Decker Incentive – Introduce and rolled out in June
 - 90%, up to \$3,000 per unit
 - o Plans to roll out to other territories next year
 - o Evaluation on this pilot begins December 31st, 2013
- Wellesley “Power to Save” Campaign
- Medford & Swampscott
 - o National Grid sent out a RFP to ask community to get involved for
 - o Goal is to increase participants by 25%
 - o If they meet or exceed this goal by December 31st, 2013 and incentive will be rewarded
- Nantucket and Home MPG
 - o Working with DOER
- Worcester
- City of Somerville
- New Bedford
- Community efforts were established before Efficient Neighborhoods+, PA specific pilots were in place
- Efficient Neighborhoods+ is focused and targeted on a very specific target audience, income is a huge difference than community efforts that focuses on a number of target audiences
- Secondary benefits are associated with income information
- Lyn Huckabee asks if there is a way to compare all these community efforts?
 - o PA will bring this up to the statewide evaluation group
 - o No plan in place that compares PA efforts to one another for community efforts
- Charlie Harak asks for comparison on what was spent and what each PA got out of it.
 - o This will be tracked.

Pre-Weatherization Status

- No statistics were shared because the effort was just launched in the spring
- Data analysis will be presented in September 2013
- No new efforts

Tenant-Landlord

- Efficient Neighborhoods+ incentives for landlord-tenant situations
- PAs feel strongly about evaluating these efforts for future engagement
- Amy Vavak mentions looking back at the communities 6 month later
 - o Offer lower incentives levels after the end of the program for interested people

Presentation on Residential Tenant-Landlord Data, Paul Gromer

- Paul Gromer presents on behalf of Peregrine Energy Group
- Data used for targeting:
 - o High landlord use versus tenant use
 - Using annual utility meter data
 - Data was very scattered
 - Individual landlord is high versus individual tenant use
 - Charles Harak is very interested in how this data was obtained, licensed broker, rules and regulations within this
 - o Owner occupancy and promising building characteristics
 - o High uses and poor performing equipment
- 90% of 1-3 unit buildings were built before the insulation mandate
- Used data to target buildings with desired occupancy, age and building characteristics
 - o Determines whether the building is a good candidate for EE projects
 - o This information was shared with the Renew Boston efforts
 - o Combine databases of multiple communities for opportunities outside of Boston
- Use by Building Group
 - o Data is broken down by kWh per week
 - o HVAC, Domestic Hot Water, Common Area Rooms & Other
- Use by Equipment
 - o Boiler, Cable Elevator, Dryer, Fans (Exhaust), Fan (Supply), Heater, Lights, Other, Plug Loads, Pumps, Washing Machine
- Boiler Run Time – By Minute
 - o Boilers are inefficiently running
- Triple Decker, Paul Gromer points out 1400 candidates
- Key Take-A-Ways:
 - o Data is available to anymore
 - o Analysis is conducted from information that people weren't able to use in analyzing EE opportunities within Residential Tenant-Landlord Data
 - o Electricians install equipment to get results
 - o Compare research results to how you want your building to be running versus how it is actually running
- Amy Vavak talks about Triple Decker assessment for Jamaica Plain, MA
 - o Direct Mail
 - Offer workshops for interested parties

- There people can sign up
- Schedule home energy audits

- Amy Vavak wants to know when the PAs will start to look into new community outreach?
 - National Grid is going to hire a Community Relations person
- Margie Lynch asks about pairing the C&IMC and RMC efforts
 - If additional information is presented to either committee to make sure it is communicated back to its respected committee

Next Meeting:

- September 18, 2013 during the RMC meeting
- 10:00am-11:00am
 - Efficient Neighborhoods+ Statistics
 - PAs will not be sharing draft report
- Lyn Huckabee to send RMC in writing what exactly DOER is looking for
- Other stakeholders were asked to also offer questions/comments for the report.

Meeting adjourned at 3:06pm

4. Meeting of September 18, 2013

**Residential Barriers Working Group Meeting
September 18, 2013
Columbia Gas of Massachusetts Westborough, MA**

MEETING PARTICIPANTS

Charlie Olsson, Riley Hastings & Kristin Rusk (NSTAR)
Margie Lynch (Consultant Group)
Beth Lonergan (National Grid)
Margaret Song (Cape Light Compact)
Tom Palma (Unitil)
Mike Sommer (Berkshire Gas)
Leah Berger (Columbia Gas of MA)
Trish Walker (New England Gas)

Matt Saunders (phone) (Attorney General Office)
Emmett Lyne (phone) (Rich May)
Debra Hall (DHCD)
Jeremy Schenk (Green Justice Coalition)
Melanie Coen (National Grid)
Charlie Harak (Company)
Jerry Oppenheim (LEAN)
Cyndi Luppi (Clean Water Action -representing Amy Vavak of Mass Energy)

AGENDA

Introductions 10-10:10
Pre-Weatherization update 10:10-10:30
Efficient Neighborhoods update 10:30-10:45
Landlord Tenant Barrier Discussion 10:45-11:30
LEAN (landlord/tenant strategies) 10:45-10:55
Open discussion on Landlord/Tenant Barrier Strategies 10:55-11:30

Meeting Minutes

Beth L. started the meeting at 10:09 a.m.
Roundtable & phone introductions
Margaret S. kicks off the PowerPoint presentation

Goals of the PAs:

- Efficient Neighborhoods+ Initiative
 - o PAs provide a comparison of last time until current
 - o PAs have seen a significance increase in participation
 - o PAs will report on marketing efforts and what has been done in each of the towns
 - o Cyndi Luppi points out the lessons learned and congratulates the PAs on their approaches
 - o Increased awareness and engagement through ripple effect
- Pre-weatherization barriers
 - o Margie L. asks the PAs to give high level detail of how the numbers were generated
 - o Margaret S. explains the offerings by PA identified by low cost barriers
 - o PAs pay 100% for all three offerings, goal is to gather the savings
 - Knob & Tube
 - High CO
 - Dryer Vent
- Landlord tenant barrier
 - o Does the money act as a barrier? Can we increase the participation rates if we vary offerings?
 - o Difficult sector
 - Split incentive → why would landlord invest in savings for tenants?
 - Very short time horizon (high discount and hurdle rates) so low interest in investment of any kind
 - Sometimes, a fear of building inspection (justified)
 - o Money talks
 - Level of LL co-payment
 - Efficient Neighborhoods+ experience with > rebate
 - o With conditions
 - Rent freeze for specified time by enforceable contract
 - o Requires no program changes, administrative or staffing
 - o To attract landlord, Jerry O. communicates the effectiveness of offering incentives and finding the magical number to get them to engage further
 - o Ultimately the PAs goal is to lower the bills of the tenants and the landlords in the long run
 - o Landlords want to spend as little money as needed out of their own funds to invest in energy efficiency opportunities
 - o Every landlord that gets rebate or incentive they must commit to minimum requirements
 - o Charlie O. asks for numbers to back up Jerry's analysis of landlord engagement barriers
 - Low-income vs. 2-4 units vs. multi-family
 - o As you move up the income scale of the tenants the barrier to entry becomes less of an obstacle
 - o When landlords engage in opportunities within energy efficiency, the tenant receives a copy a the agreement

- Very few calls relating to the lack of engagement after initial contract is signed or complaints of landlords breaking contract
 - NICE → Neighborhood Improvement through Code Enforcement
 - Committee that discusses various strategies, as well as, meets with owners of problem properties to solve issues in an attempt to work with folks who face legal actions from the City
 - Fitchburg
 - Big stick with incentives
 - EE referrals
 - AG foreclosures
 - CDBG (Community Development Buildings)
 - Buildings that cross sectors
 - Low income programs' 50% requirement (1+ of 2, 2+ of 3 or 4 units)
 - If met, entire building treated in low-income program with few LL co-payments
 - Share across programs where 1 low-income out of 3 or 4
 - LL gets benefit of no co-payment w/r/T 1 unit
 - Experience with Efficient Neighborhoods+ experimental protocol dividing units between programs?
 - Much easier with common contractor
 - More Information: Jerry Oppenheim (978) 283-0897
jerroldopp@democracyandregulation.com
- Beth L. asks when the PAs are compiling final report if they can attach Jerry's PowerPoint. Approved by Jerry.
- Open Discussion – Additional strategies to overcome landlord/tenant barriers
- Debra H. asks how we can make more efficient cost effective opportunities for 5+ units
 - Unpredictable cycle
 - Customers are saving capital money for future engagements
- Cyndi L. asks about the multi-cultural marketing and awareness branding
 - National Grid is looking to offer marketing collateral in Chinese
 - Malden has the most diverse languages in their marketing collateral offerings
- Margie L. brings up Charlie H. points on how landlords appreciate hand holding process
 - Have there been any efforts on this barrier?
 - PAs have no “official” landlord coordinator
 - Each PA has one person within that is familiar with programs offerings for landlords
- Charlie H. tells the group about CNT Energy in Chicago and how they run a very effective landlord program
- Jeremy S. asks Jerry O. about digging deeper on multi-generational vs. differences in income
- Lot of flavors in this variety pack for barriers to entry
- Trish W. communicate that happy tenants are better for these programs

- NEG knows of a landlord that has fully embraced taking care of his tenants and EE opportunities
- Trish W. to follow up about featuring him in a testimonial showing real dollars statistics to share in success stories
- Margie L. asks if any PA have experimented with educating the tenants
 - Reward the landlords with their participation
 - Jerry O. states in the past that the tenants were aware of program offerings
 - Tenant focused approach – there are risk factors involved with this
 - A lot of tenants are young professionals renting as they start their careers
 - Some people do not want to broadcast that they are renters vs. homeowners

Beth adjourns the meeting at 11:30 a.m.

ATTACHMENT B - RESIDENTIAL BARRIERS WORKING GROUP PRESENTATIONS

Presentation of PAs on March 27, 2013

Presentation of PAs on August 27, 2013

Presentation of Paul Gromer on August 27, 2013

Presentation of PAs on September 18, 2013

Presentation of Jerrold Oppenheim on behalf of LEAN on September 18, 2013



Residential Barriers Working Group Stakeholder Session

March 27, 2013

DRAFT WORKPRODUCT-SUBJECT TO REVISION
NOT A FINAL PROPOSAL- PROVIDED FOR DISCUSSION ONLY
NOT FOR PUBLIC FILING OR FORMAL APPROVAL





Agenda

- | | |
|-------------|--|
| 12:30-12:40 | Welcome and Introductions |
| 12:40-12:45 | Review of DPU Order requirements for RBWG |
| 12:45-1:30 | Proposed Design for
<u>Efficient Neighborhoods+ Initiative</u> |
| 1:30-2:15 | Stakeholder Questions and Discussion |
| 2:15-2:30 | Develop list of takeaways and next steps
Discussion of next meetings for other items to be
addressed by RBWG |



Review of DPU Order

In summary, D.P.U. 12-100 through D.P.U. 12-111, pages 44-48 states:

- Program Administrators (PAs) must “convene a working group with all stakeholders to address the specific strategies to overcome residential barriers.”
- PAs must provide the DPU with an agenda in advance of each meeting
- PAs shall provide a written progress report to the DPU by 9/30/13 on:
 - (1) the Efficient Neighborhoods+ initiative;
 - (2) community-based engagement initiatives;
 - (3) the landlord/tenant barrier; and
 - (4) the pre-weatherization barrier.



Residential Barriers Working Group

RBWG will address these four issues:

- (1) the Efficient Neighborhoods+ initiative;
- (2) community-based engagement initiatives;
- (3) the landlord/tenant barrier; and
- (4) the pre-weatherization barrier.



EN⁺ Community Selection Criteria

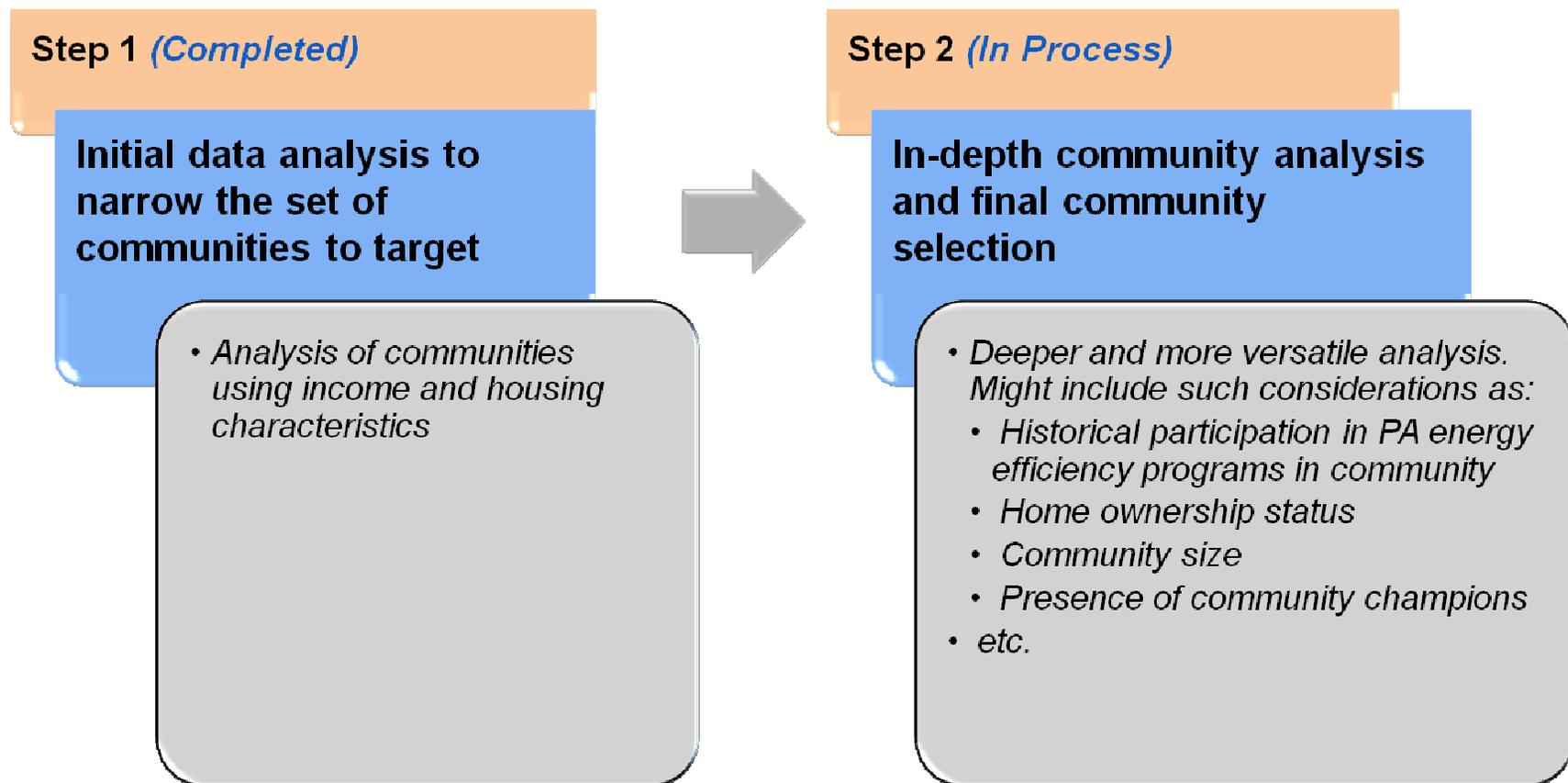
Initially, PAs identified potential target communities by looking at :

- Environmental Justice communities (and the percent of population in EJ block groups)
- Number of households in the 61% to 120% SMI bracket
- Number of residents who are minority or non-English speaking

PAs engaged **Opinion Dynamics** to refine our analysis.

Scope for the Initiative Effort

- Data mining exercise to identify communities with the highest potential for success.





EN+ Community Selection - Methodology

Step 1 – Initial Analysis to Narrow the Set of Communities for Targeting

- Used American Community Survey (ACS) Data for 2007-2011 *(consistent with the approach used by Environmental Justice)*
 - Data fields of interest available at the census block group level
 - Core data fields (housing count, population count, income, housing stock, home ownership status)
- Used geo-mapping software to overlay ACS data with a map of PA service territories and Massachusetts' towns.
- Result is a data file that links PAs and towns to census block groups data.

Census block group – generally contains between 600 and 3,000 people, with an optimum of 1,500 people.

Provides sufficient detail for targeted marketing and outreach



EN+ Community Selection - Methodology

Step 1 – Initial Analysis to
Narrow the Set of
Communities for Targeting

- Target communities have a higher than average number of households with:
 - Incomes falling between 61% and 100% of median income
 - 1 – 4 unit buildings
- Also want to avoid communities with high concentrations of:
 - Low-Income Program eligible customers
 - Multi-family (5+ units) buildings



EN+ Community Selection - Methodology

Step 1 – Initial Analysis to
Narrow the Set of
Communities for Targeting

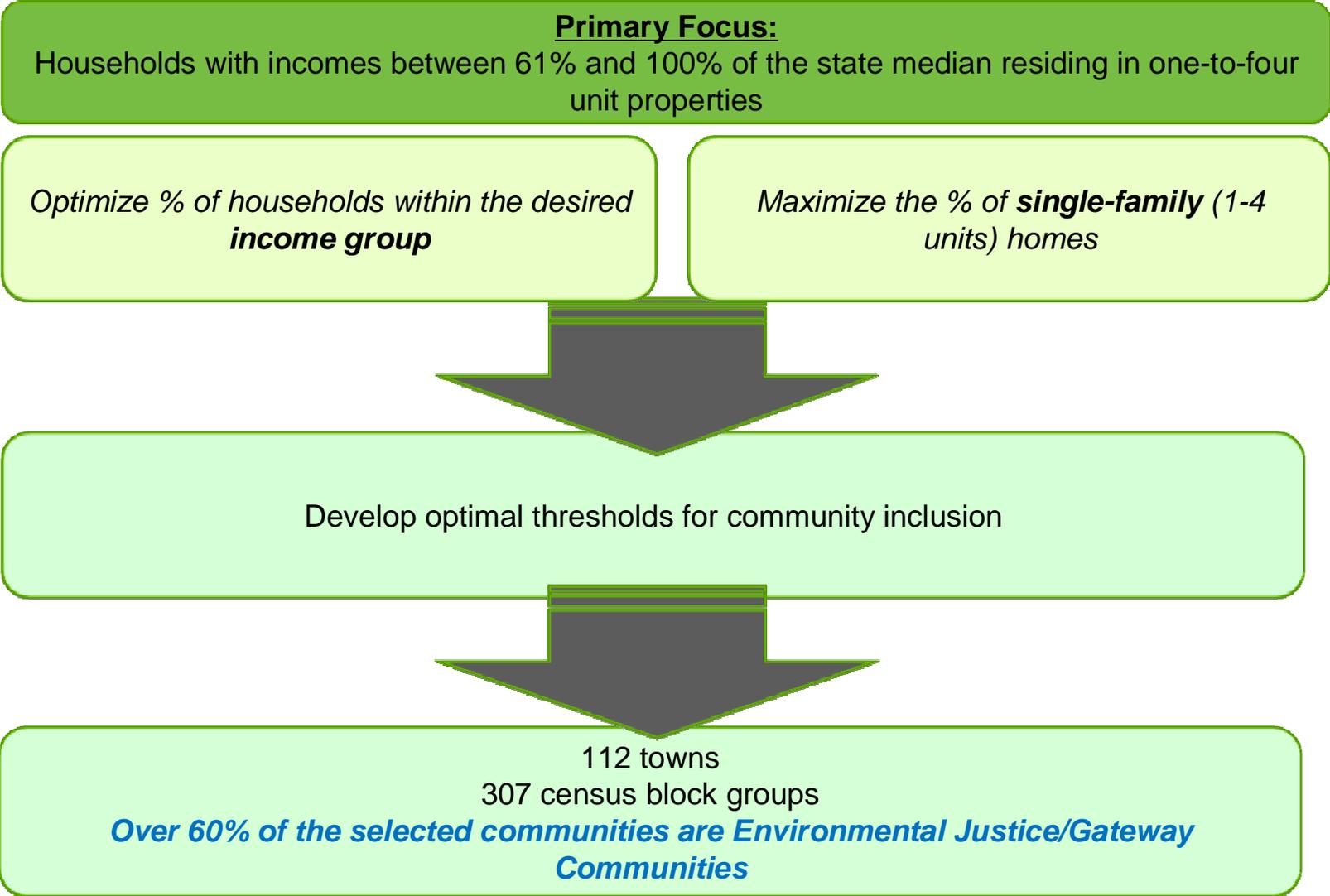
- Analyzed income and building stock data fields to identify target communities
- Ran multiple iterations to identify optimal thresholds for community inclusion
 - Inspected a variety of descriptive statistics (means, medians, standard deviations, percentage distributions)
 - Constructed multiple scenarios to analyze for fit
 - Conducted analysis overall and by PA

In setting optimal thresholds, it was important to substantially narrow down the set of communities while still providing PAs with enough communities to meet their goals



EN+ Community Selection - Results

Step 1 – Initial Analysis to Narrow the Set of Communities for Targeting





EN+ Community Selection Methodology

Step 2 – In-depth Community Analysis and Final Community Selection

- In-depth analysis of the list of qualified communities to select communities to include in the initiative
- Consideration of such factors as:
 - Prior participation in PA-administered energy efficiency programs
 - Percentage of renters vs. owners
 - Whether a community was selected as a Gateway/Environmental Justice community
 - Building stock and characteristics (age, size, etc.)
 - Other characteristics
- For selected communities, map customer addresses and rate codes to support custom targeting
 - Identification and removal of the low-income rate codes



EN⁺ Low-Income Coordination

An important goal of this initiative is to maintain coordination between the low-income and HES Initiatives.

- It is crucial to ensure that customers who are identified as income eligible receive the services from the low income network.
- Important to identify customers who may meet income eligible criteria but have not been identified as such and are not receiving services under existing low-income utility rates or public programs.



EN+ Low-Income Coordination

- The PAs want to ensure that all participants receive easy to understand information about receiving low-income services.
- Procedures for serving potential low-income customers will be coordinated with each PAs Lead Low-Income Vendor.
- Rate designated low-income customers will be screened out of initial mailings.
- A joint strategy will be in place with LEAN to be certain customers are directed appropriately



EN⁺ Proposed Incentives

- *Challenge: Develop incentive structure that...*
 - Reduces financial barriers for financially challenged*
 - Increases Major Measure/Deeper savings adoption
 - In targeted neighborhoods and,
 - In combination with targeted homeowners
 - Is “enticing” enough to encourage 2-4 family landlord participation
 - Can be “Bundled/Packaged” for greater marketability
 - Can be delivered through current HES program delivery infrastructure
 - Ensures cost-effectiveness is a key element of overall incentive design

* (above low-income threshold)



EN+ Proposed Enhanced Incentive Model

Enhanced Incentive Description	Enhanced Incentive	Existing Incentive
Common Area Lighting (LED or CFL depending on fixture)	\$120	\$0
Pre-Weatherization Barrier Incentive	* Up to \$800	\$0
90% up to \$3000 Insulation per unit/single family	\$1,980	(Based on historical job costs) \$1,650
2-4 Family Landlord Whole House Insulation with Adder (50% of Customer Contribution)		(Based on historical job costs)
2 Family	\$5,130	\$4,000
3 Family	\$7,695	\$6,000
4 Family	\$9,500	\$7,500
Early Retirement Refrigerator (ENERGY STAR® labeled)	\$200	\$150
EN+ Boiler & Furnace Incentive Adder	\$100	**\$0
Early Boiler Replacement (EBR) Rebate with Additional \$500 Incentive for Non-owner Occupied Properties	(\$4,000) Unrestricted Timeline	(\$4000) Restricted Timeline
EN+ Whole House \$500 Incentive Adder Package Insulation + Heating Equipment	\$500	\$0

*Multiple barriers allowed: Knob & Tube/Dryer Venting = \$250 each, High CO = \$300

**Existing gas boiler rebates \$1,000-\$1,500, Existing gas furnace rebates \$300-\$450, Existing Oil equipment \$400-\$500



3 Family Example – The Whole Package!

Incentive Description	Customer Contribution*	Incentive
Lighting in units and common areas	\$0	\$300
Low flow showerheads & faucet aerators	\$0	\$50
Programmable Thermostats	\$0	\$150
Targeted cost-effective air sealing	\$0	\$800
Fully insulated 3 family (includes adder incentive)	\$405	\$7,695
ENERGY STAR® refrigerator retrofits in all units	\$1,200	\$600
Early boiler replacement of 3 units (non-owner occupied)	~\$9,000	\$12,000
EN+2-4 family whole house landlord incentive adder	\$0	\$500
0% HEAT Loan up to \$25,000	Principal only - Interest subsidized	

Contribution	Incentives	Total
\$10,605	\$22,095	\$32,700

*Estimates



Proposed Enhanced Incentive Model

Enhanced Incentive Description	Enhanced Incentive	Existing Incentive
Common Area Lighting (LED or CFL depending on fixture)		\$0
Pre-Weatherization Barrier Incentive	Up to \$800	\$0
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4 Family		\$7,500
Early Retirement Refrigerator (ENERGY STAR® labeled)	\$200	\$150
EN+ Boiler & Furnace Incentive Adder		**\$0
Early Boiler Replacement (EBR) Rebate with Additional \$500 Incentive for Non-owner Occupied Properties	(\$4,000)	(\$4,000)
	Unrestricted Timeline	Restricted Timeline
EN+ Whole House \$5,000 Incentive Adder Package Insulation + Heating Equipment	\$500	\$0

Packaged Incentives

Packaged Incentives

Landlord Barriers

Pre-weatherization

Working Poor

Going Deeper

Program Integration

Landlord Barriers

Landlord Barriers

Whole House

Whole House

Going Deeper

Packaged Incentives

Packaged Incentives

Boiler Venting = \$250 each, High CO = \$300
 Existing gas furnace rebates \$300-\$450, Existing Oil equipment rebates \$500-\$750



EN⁺ Potential Marketing Strategies

Key Marketing Goals:

Communicate to communities and local officials about EN⁺.

Engage their assistance where possible to obtain landlord lists and names of active civic organizations, neighborhood associations, as well as, key ambassadors in target neighborhoods.

Recognize that each community is unique and work with the communication channels that are effective.



EN⁺ Potential Marketing Strategies

PA Led Marketing Tactics

- Use a variety of marketing outreach efforts that include using traditional marketing methods and market segmentation activities in combination with coordinated outreach activities.



Proposed EN⁺ Delivery Process

- Assessment & Implementation Services
- Homes with Opportunities
- Homes with Pre-Weatherization Barriers
- Packaged Measure Incentive
- Enhanced Furnace/Boiler Incentive
- Whole House Bonus
- Timeline



Residential Barriers Working Group Stakeholder Session

Questions and Discussion



Residential Barriers Working Group Stakeholder Session

Next Steps



Residential Barriers Working Group Stakeholder Session

August 27, 2013





Agenda

1:00-1:10	Welcome and Introductions
1:10-1:20	Goals for today
1:20-1:35	Update on EN+
1:35-1:50	Update on Communities
1:50-2:00	Pre-Weatherization Status
2:00-2:45	Presentation on Residential Tenant-Landlord Data
2:45-3:00	Next Steps



Welcome

Please introduce yourself and your professional affiliation.



Goals for the Day

The Program Administrators shall provide a written report to the Department, on or before September 30, 2013.

At a minimum, the report should include information on:

- (1) the Efficient Neighborhoods+ initiative - *discussed*
- (2) community-based engagement initiatives – *for today*
- (3) the landlord/tenant barrier – *for today*
- (4) the pre-weatherization barrier - *discussed*



Update on EN+

7/31/2013	Eligible Customers	HEAs Scheduled	Participation Percentage	CAP Referrals
Adams	2,484	127	3.86%	14
Fall River	34,352	163	0.40%	62
Hyde Park	432	20	4.63%	1
Lowell	1,284	32	2.49%	6
North Adams	3,294	171	5.19%	25
Plymouth	762	30	3.94%	1
Watertown	869	19	2.19%	0
W. Springfield	620	44	7.10%	0
Total	44,097	606	1.37%	109

Unitil will launch the program in Townsend on August 23. Customers may sign up through October 31. The Company will focus on neighborhoods that meet the EN+ criteria but will not be offering the EN+ incentives to the whole town.

Pursuant to a Governing Board vote, Cape Light Compact will be launching an effort in the fall that is based upon income verification.



Marketing Examples from EN+

Mass Save's Efficient Neighborhoods Plus Presents:

ALL ACCESS INCENTIVES & REBATES

YOUR TICKET TO **HOME ENERGY SAVINGS**

LIMITED OFFERS NOW THRU SEPT 30 TOWN OF ADAMS

mass save | nationalgrid | 1-855-ENE-PLUS

The Fall River Neighborhood Energy Contest

2013 FALL RIVER NEIGHBORHOOD ENERGY Contest

The Fall River Neighborhood Energy Contest
Community Page about Energy efficiency

Hey Lowell,
Reserve Your VIP Offers by September 30, 2013

90% off insulation improvements, up to \$3000! No-cost air sealing!

Save \$200 on your new refrigerator!

Pre-Weatherization Barrier Incentives

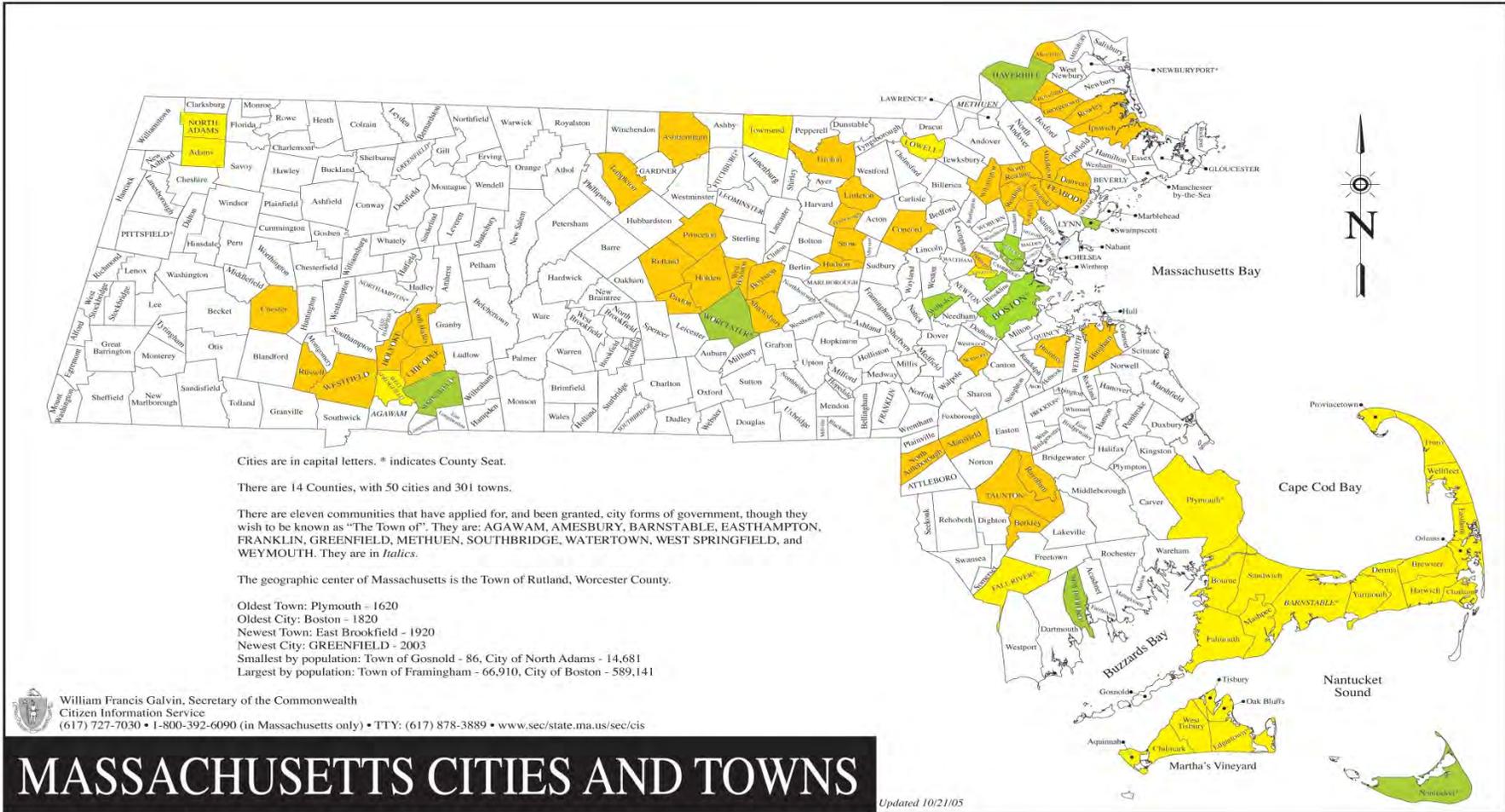
Early Boiler Replacement Rebate

Save \$1,000-\$1,500 on gas boilers! Save \$400-\$500 on gas furnaces!

Save an additional \$200 per unit, or \$500 landlord bonus for all units!

Available for a limited time through September 30, 2013
Call today 1-855-ENE-PLUS (363-7587)

Community Update



Yellow denotes EN+. Green represents community effort. Orange are munis (for context).



Community Efforts

- Renew Boston
- Wellesley “Power to Save” campaign
- Medford
- Swampscott
- Nantucket and Home MPG
- Worcester Energy Residential Rebate Program
- City of Somerville
- New Bedford



Community Efforts – Low Income

- Haverhill – National Grid and Action Inc.
- City of Somerville – NSTAR and Tri-City Community Action Program (single family)
 - NSTAR and ABCD (multi family)
- Forest Park neighborhood, Springfield – NSTAR and Columbia Gas of Massachusetts with Springfield Partners of Community Action and the Vietnamese American Civic Association.
- Turners Falls – Berkshire Gas and Community Action



Pre-weatherization Update

- Pre-Weatherization discussion – Residential Barriers Working Group – March 27, 2013
- April/early May launch of pre-weatherization offer into field
- Data for September report

Tenant-Landlord

- EN+ incentives for landlord-tenant situations

mass save Proposed Enhanced Incentive Program

Enhanced Incentive Description	Enhanced Incentive	Existing Incentive
Common Area Lighting (LED or CFL depending on fixture)		\$0
Pre-Weatherization Carrier Incentive	Up to \$800	\$0
90% up to \$3000 Insulation per unit/single family		(Based on historical job costs) \$1,650
2-4 Family Landlord Whole House Insulation with Adder (50% of Customer Contribution)	2 Family	(\$1,000)
	3 Family	\$7,695
	4 Family	\$7,500
Early Retirement Refrigerator (ENERGY STAR® labeled)	\$200	\$150
EN+ Boiler & Furnace Incentive Adder		**\$0
Early Boiler Replacement (EBR) Rebate with Additional \$500 Incentive for Non-owner Occupied Properties	(\$4,000) Unrestricted Timeline	(\$4,000) Restricted Timeline
EN+ Whole House \$500 Incentive Adder Package Insulation & Heating Equipment	\$500	\$0

Boiler Venting = \$250 each, High CO = \$300
 Existing gas furnace rebates \$300-\$450, Existing Oil equipment rebates \$1,000-\$1,500



Tenant-Landlord with Renew Boston

new
ENERGY-EFFICIENCY
INCENTIVES

**FOR BOSTON
DUPLEXES &
TRIPLE-DECKERS**

Revitalize Your Entire Building
now
WITH RENEW BOSTON

SEE REVERSE FOR MORE DETAILS

june 2013

Renew Boston
Save Energy, Save Money
Thomas W. Malin, Mayor

GREENSMART
BOSTON

nationalgrid
HERE WITH YOU, HERE FOR YOU.

NSTAR

mass save
Savings through energy efficiency

- 90% up to \$3,000 per unit--for insulation where all eligible units are weatherized
- Pre-weatherization incentives
- Up to \$4,000 to replace functioning boilers that are at least 30 years old (EBR)
- Generous rebates for qualified ENERGY STAR products
- A 0% interest HEAT Loan to finance qualified energy efficiency upgrades



Presentation from PAUL GROMER



Residential Barriers Working Group Stakeholder Session

Questions and Discussion



Residential Barriers Working Group Stakeholder Session

- Next Steps
- Next Meeting Date



Using data to target efficiency efforts

August 27, 2013

Paul Gromer

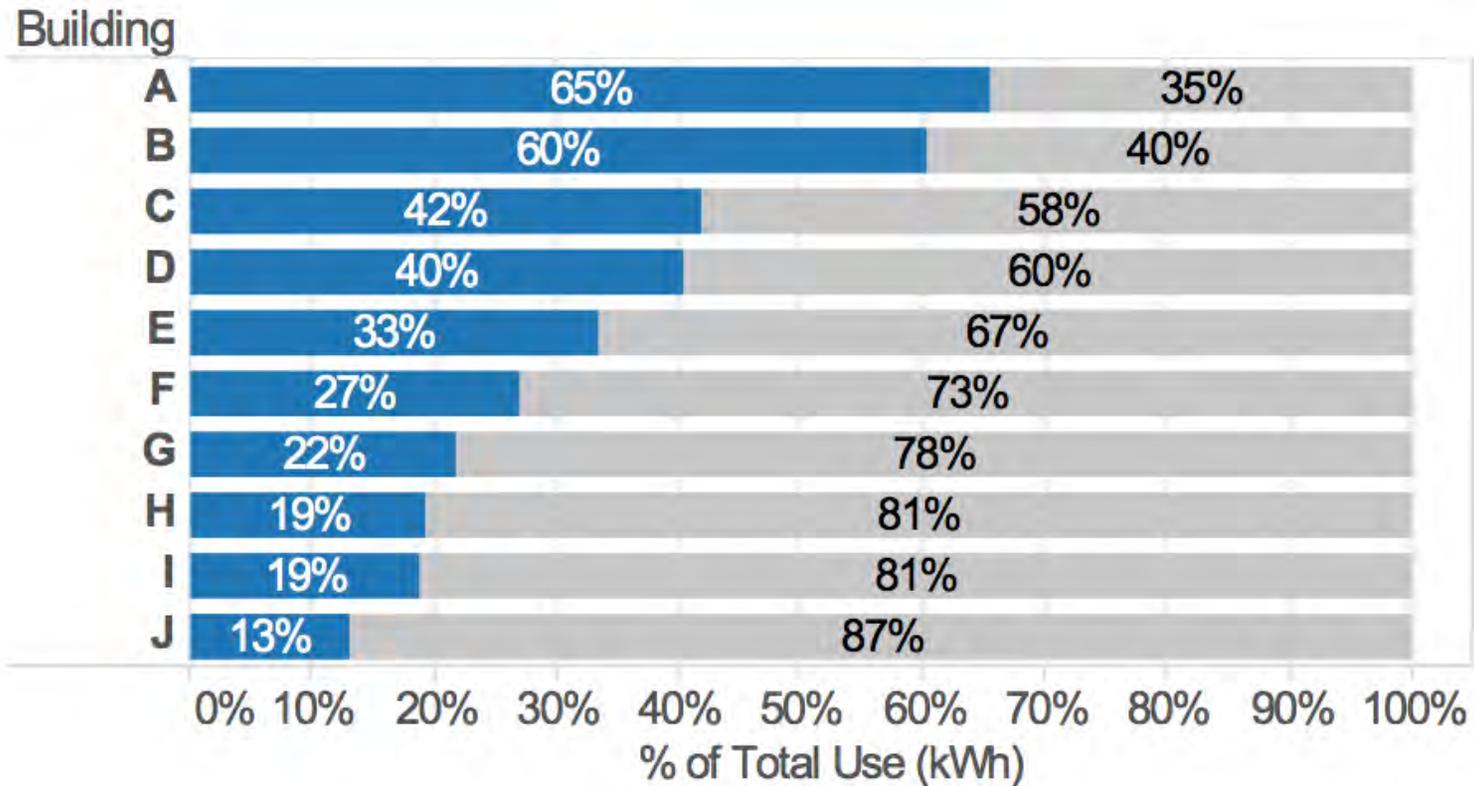


Using data for targeting

- High landlord use
 - Using annual utility meter data
- Owner occupancy and promising building characteristics
 - Using assessor data
- High uses and poor performing equipment
 - Using circuit-level energy use data

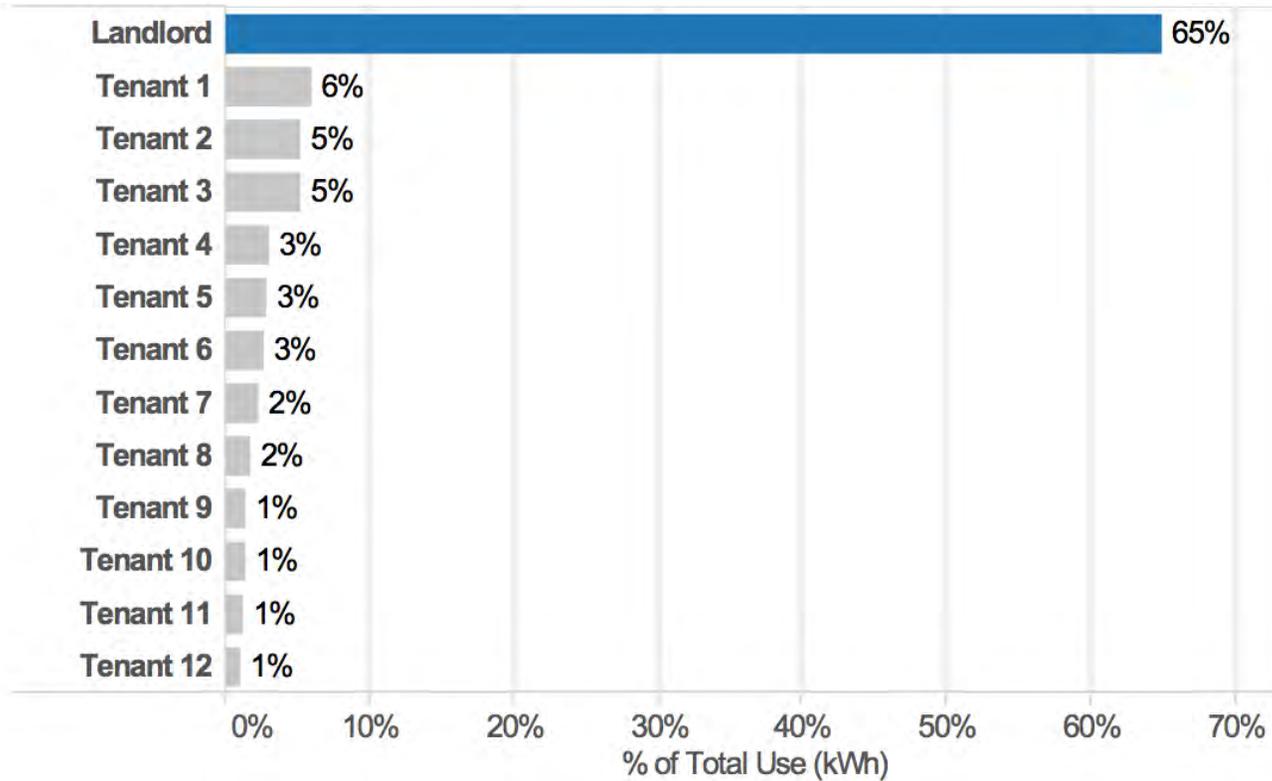


Landlord use vs tenant use – by building





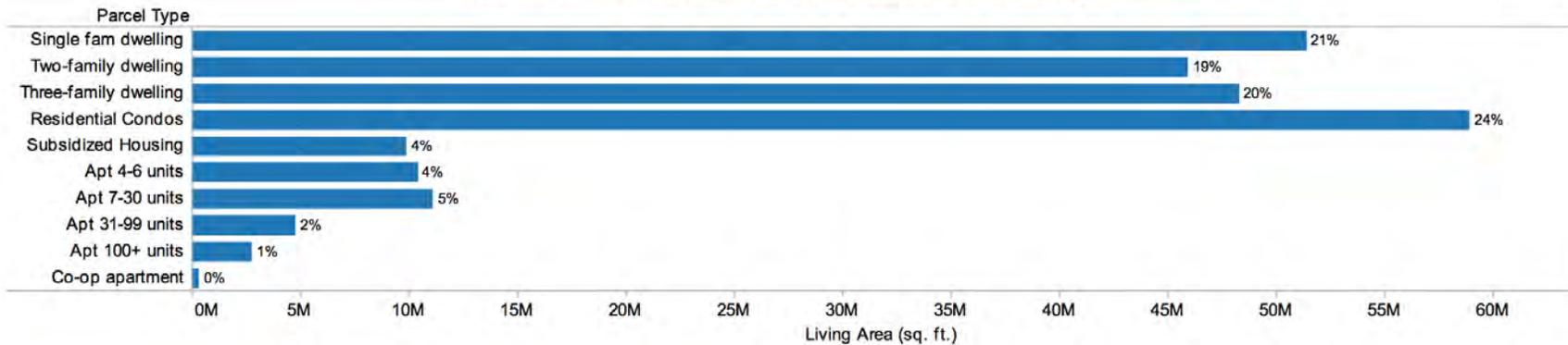
Landlord use vs tenant use – within a building





Square footage by parcel type

Residential Property -- Square Footage by Parcel Type

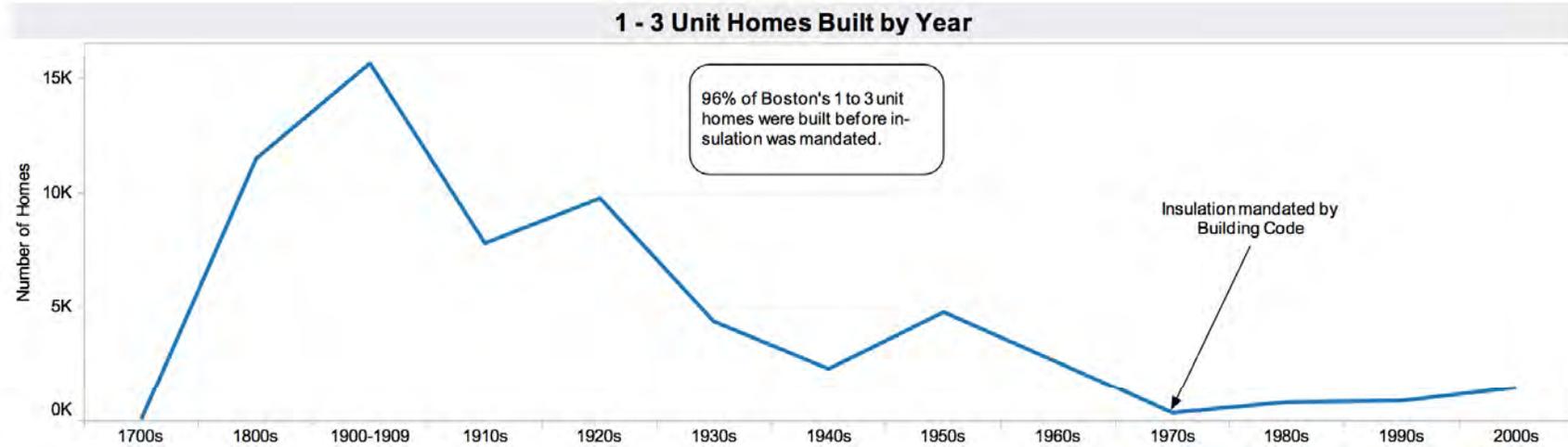


Residential Property by Parcel Type

Parcel Type	No. of Parcels	Living Area (sq. ft.)	% of Total Living Area	Avg. Assessed Value	Avg. Assessed Value / sq. ft.
Single fam dwelling	30,477	51,403,442	21%	\$233,609	\$139
Two-family dwelling	17,604	45,940,718	19%	\$240,077	\$92
Three-family dwelling	13,929	48,287,468	20%	\$270,967	\$78
Residential Condos	57,738	58,953,220	24%	\$415,271	\$407
Subsidized Housing	859	9,901,380	4%	\$691,990	\$60
Apt 4-6 units	2,517	10,411,466	4%	\$484,200	\$117
Apt 7-30 units	1,238	11,125,856	5%	\$916,768	\$102
Apt 31-99 units	210	4,777,454	2%	\$2,352,542	\$103
Apt 100+ units	28	2,768,657	1%	\$15,613,326	\$158
Co-op apartment	7	332,085	0%	\$6,192,014	\$131
Grand Total	124,607	243,901,746	100%	\$345,244	\$176



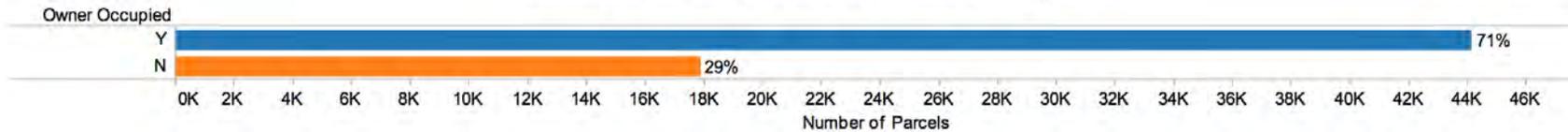
Year of construction



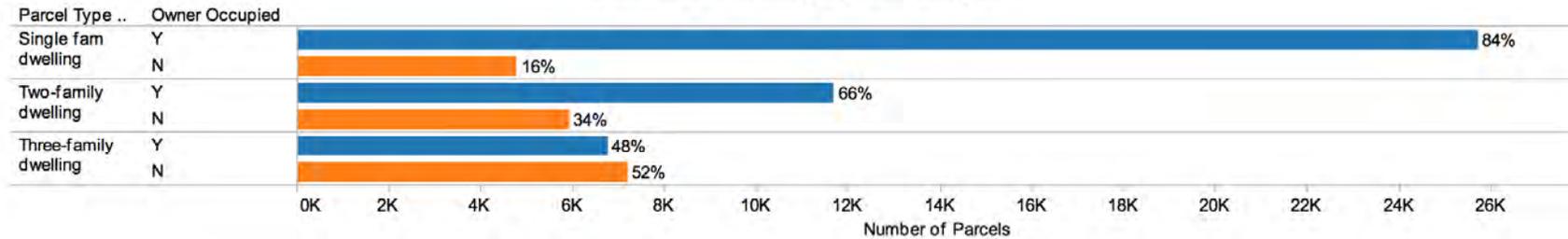


Owner occupancy

Owner Occupancy -- All 1 to 3 Unit Buildings



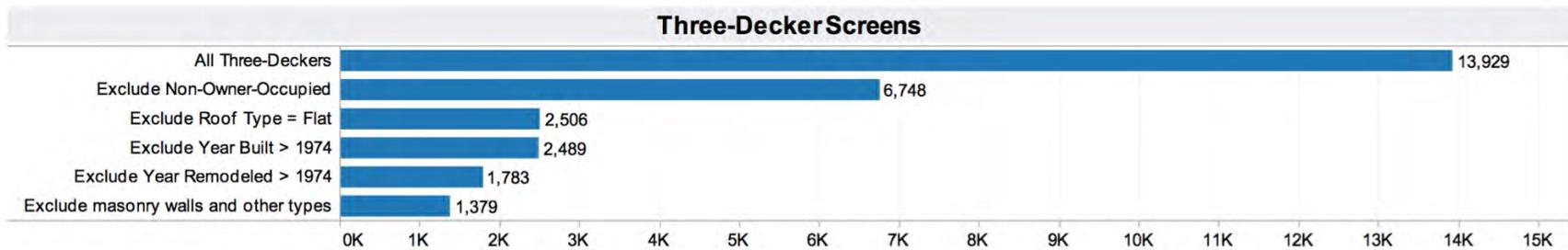
Owner Occupancy by Parcel Type





Targeting

Using assessor data, it is possible to target buildings with desired occupancy, age, and building characteristics.



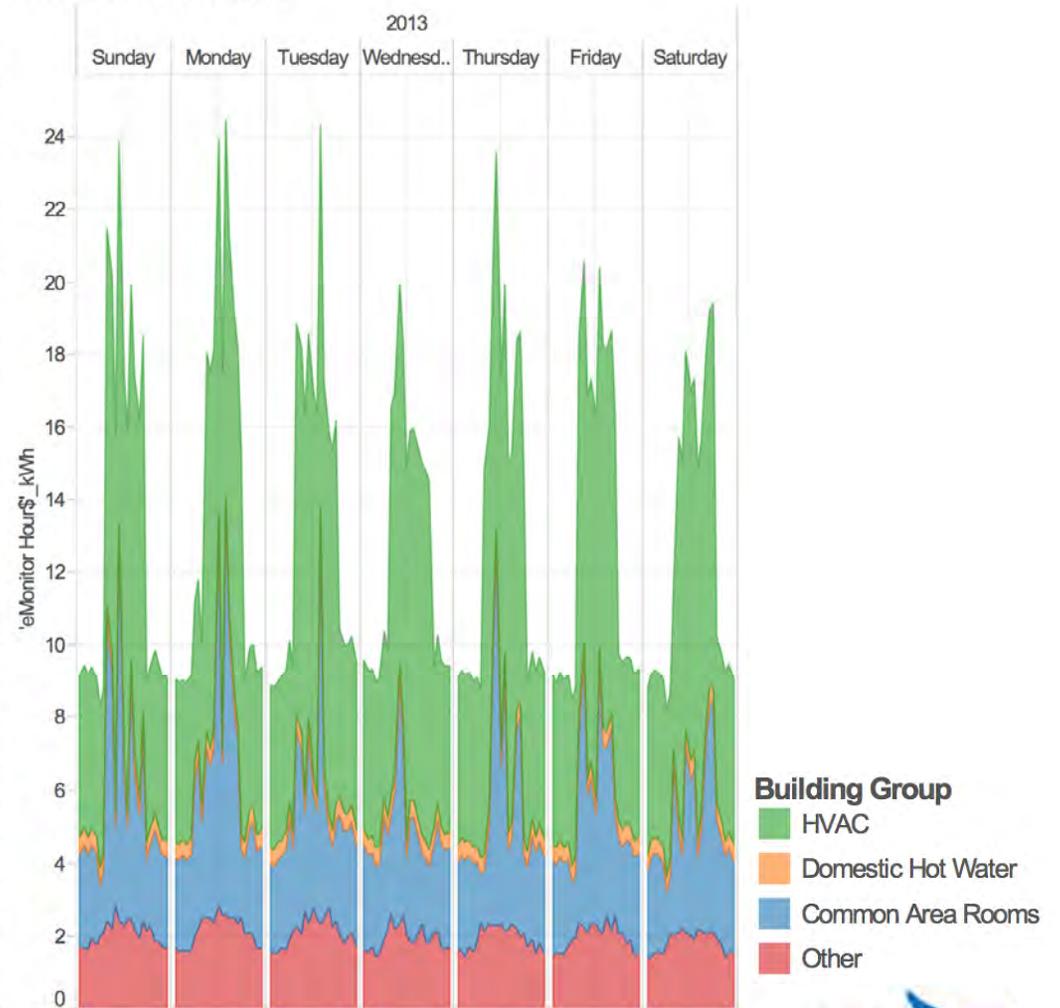


Use by building group

Building Group kWh per Week

Building Group	Building Category	Equipment Group	2013
Common Area Rooms	Class & Art Room	Lights	62
	Game Room	Plug Loads	46
	Hall & Library	Lights	309
	Kitchen	Kitchen	41
	Laundry	Dryer	178
		Washing Machine	28
	Laundry & Game Ro..	Lights	10
	Library	Room HVAC	8
	Lobby & Outside	Lights	207
		Plug Loads	7
	Management Office	Plug Loads	7
		Lights	6
	Multipurpose	Plug Loads	34
		Lights	9
	Multipurpose & Office	Lights	9
	Pool Room	Plug Loads	34
	Pool Room & Lav	Lights	6
	Recreation Room	Room HVAC	4
Room ?	Room HVAC	7	
Domestic Hot Water	Domestic Hot Water	Boiler	139
		Pumps	8
HVAC	Heating	Boiler	84
		Pumps	1,413
	Ventilation	Fan (Exhaust)	430
		Fan (Supply)	0
Other	Basement	Lights	1
	Battery Backup	Charger	16
	Elevator	Cable Elevator	154
	Hall & Rear Outside	Plug Loads	1
	Heater	Heater	236
	Intercom	Plug Loads	8
	Other	Other	4
	Sump Pump	Alarm	2
		Pumps	155
	Time Clock	Plug Loads	0

Building Group Graph



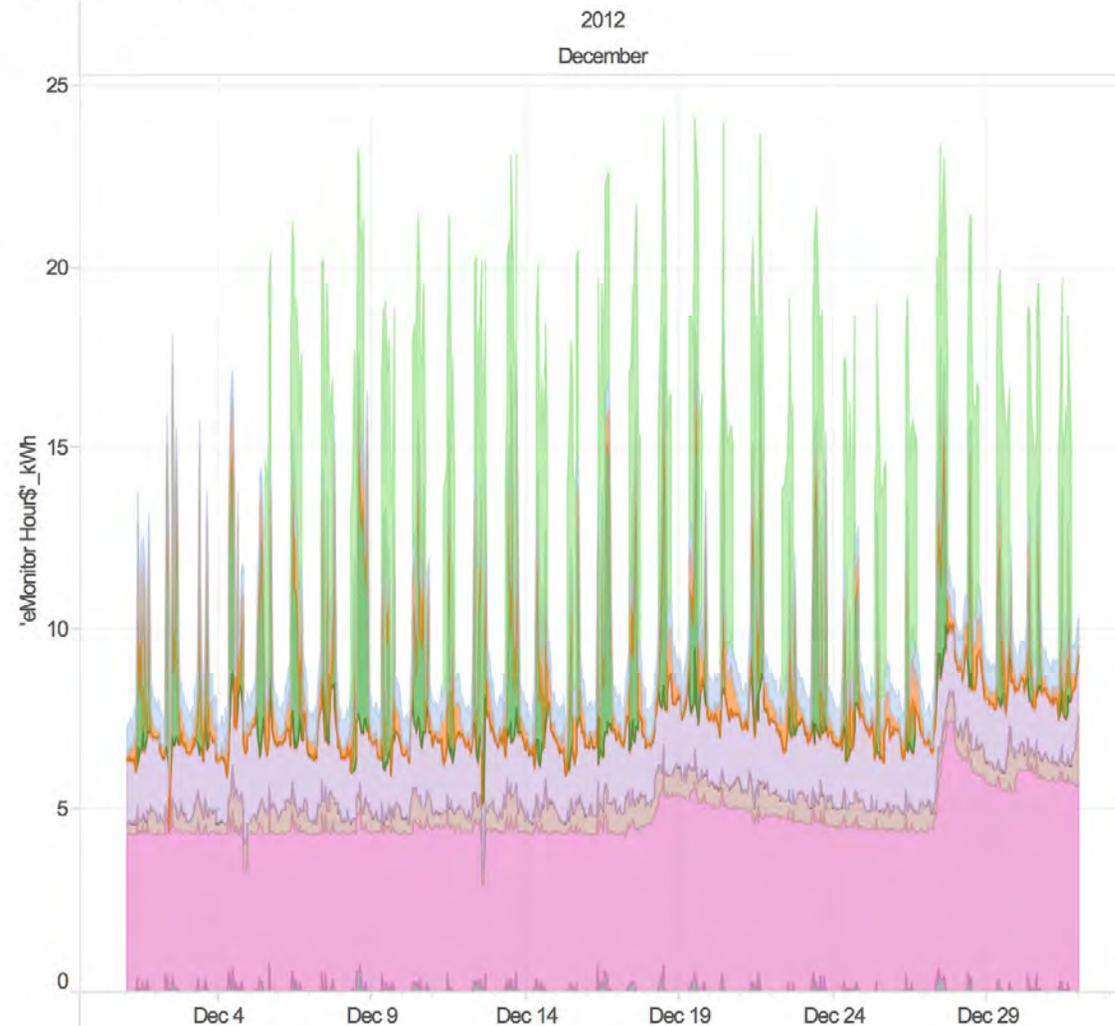


Use by equipment type

Equipment Group Table

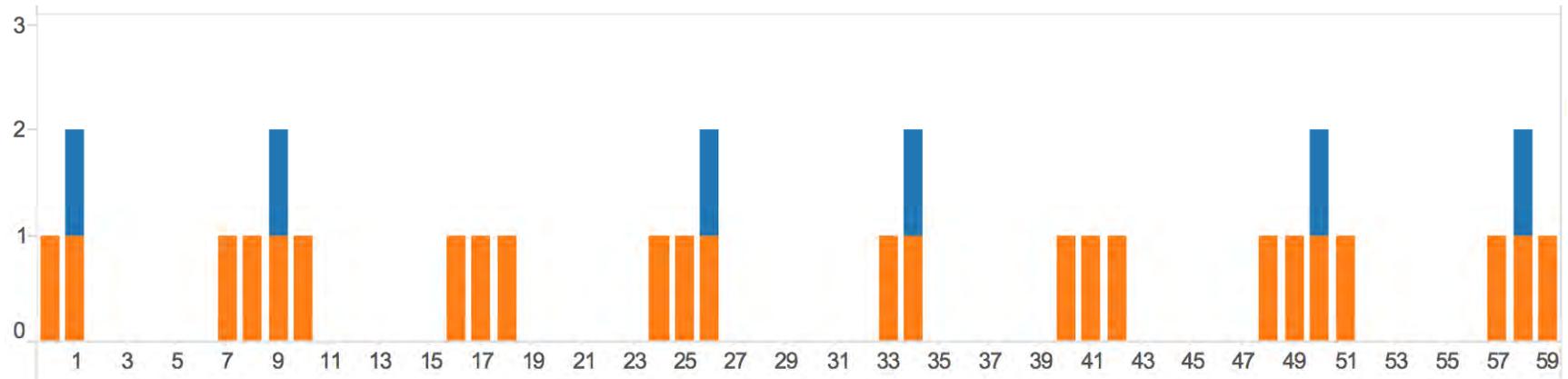
Equipment Group	'eMonitor Hour\$'_, 2012 December
Boiler	1,167
Cable Elevator	660
Dryer	857
Fan (Exhaust)	1,521
Fan (Supply)	0
Heater	88
Lights	2,699
Other	20
Plug Loads	805
Pumps	6,902
Washing Machine	52

Equipment Group Graph





Boiler run time – by minute



- Boiler 1
- Boiler 2
- Boiler 3



Residential Barriers Working Group Stakeholder Session

September 18, 2013





Agenda

10:00-10:10	Welcome and Introductions
10:10-10:15	Goals for today
10:15-10:30	Update on Pre-Weatherization
10:30-10:45	Update on Efficient Neighborhoods+
10:45-10:55	LEAN – landlord/tenant strategies
10:55-11:30	Open discussion on landlord/tenant barriers
11:30	Adjourn



Residential Barriers Working Group

Welcome and Introductions



Goals for the Day

The Program Administrators shall provide a written report to the Department, on or before September 30, 2013.

At a minimum, the report should include information on:

- (1) the Efficient Neighborhoods⁺ initiative – *update for today*
- (2) the pre-weatherization barrier – *update for today*
- (3) the landlord/tenant barrier – *for today*



Pre-weatherization Update

Through 08/31/2013	Knob & Tube		High CO		Dryer Vent	
	offered	paid	offered	paid	offered	paid
Berkshire Gas	29	0	13	0	2	0
Cape Light Compact	18	1	127	2	0*	0
Columbia Gas	53	6	42	2	1	1
National Grid Electric	42	4	7	2	5	1
National Grid Gas	74	12	9	3	3	2
New England Gas	8	0	1	0	0	0
NSTAR Electric	26	9	3	0	4	2
NSTAR Gas	12	3	5	0	1	0
Unitil	0	0	0	0	0	0
WMECO	30	2	5	0	1	0
Total	262	35	212	9	16	6

*CLC did not offer dryer vents, as it is a standard offering.



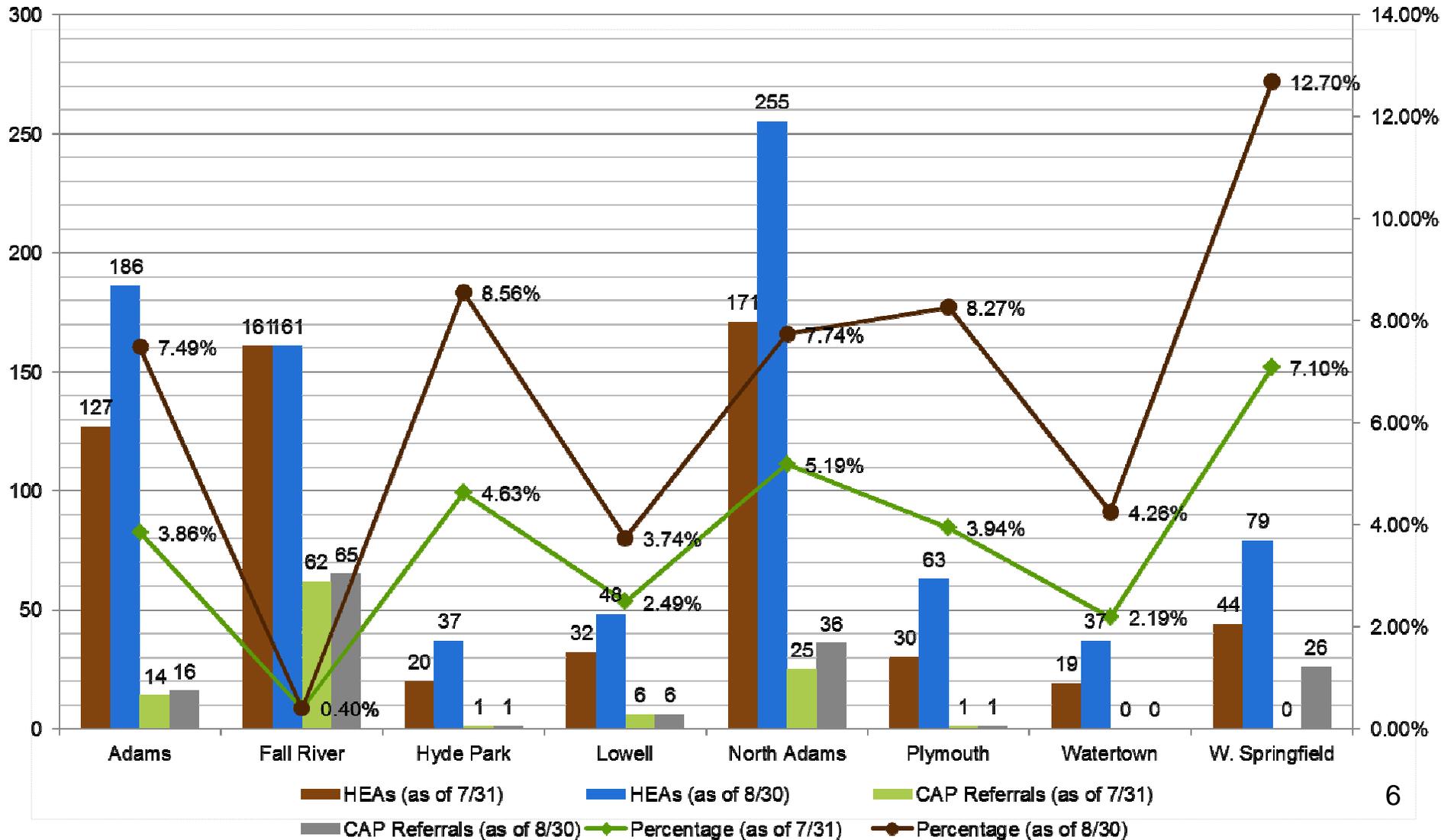
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Pursuant to a Governing Board vote, Cape Light Compact will be launching an effort in the fall that is based upon income verification.

Efficient Neighborhoods+ Status





Residential Barriers Working Group Stakeholder Session

Landlord Tenant Barriers

LEAN – landlord/tenant strategies

- Jerry Oppenheim on behalf of LEAN
 - ✓ Experiences with landlord tenant barriers in the Low Income Program

Tenant/Landlord – what we are doing in EN+

- EN+ incentives for landlord-tenant situations

mass save Proposed Enhanced Incentive Program



Enhanced Incentive Description	Enhanced Incentive	Existing Incentive
Common Area Lighting (LED or CFL depending on fixture)		\$0
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Boiler Venting = \$250 each, High CO = \$300
 Existing gas furnace rebates \$300-\$450, Existing Oil equipment rebates \$500-\$750



Tenant/Landlord – what we are doing with Renew Boston

Incentives as a result of partnership with Renew Boston

- 90% up to \$3,000 per unit--for insulation where all eligible units are weatherized
- Pre-weatherization incentives
- Up to \$4,000 to replace functioning boilers that are at least 30 years old (EBR)
- Generous rebates for qualified ENERGY STAR products
- A 0% interest HEAT Loan to finance qualified energy efficiency upgrades

- Open discussion
 - ✓ additional strategies to overcome landlord/tenant barriers



Residential Barriers Working Group Stakeholder Session

- Next Steps
- Next Meeting Date

SERVING LANDLORDS OF 2-4 UNIT BUILDINGS: LOW-INCOME EXPERIENCE

Sept.ember 18, 2013

RMC

Jerrold Oppenheim

LEAN

DIFFICULT SECTOR

- Split incentive: why would landlord invest in savings for tenants?
- Very short time horizon (high discount and hurdle rates) so low interest in investment of any kind
- Sometimes, a fear of building inspector (justified)



- Money Talks
 - Level of LL co-payment, if any
 - EN+ experience with > rebate?
- With conditions
 - Rent freeze for specified time, by enforceable contract
- Requires no program changes, admin, or staffing

NICE

- Fitchburg
 - Neighborhood Improvement through Code Enforcement
 - Big stick with incentives
 - EE referrals
 - AG foreclosure funds
 - CDBG
-

BUILDINGS THAT CROSS SECTORS

- LI programs' 50% requirement (1+ of 2, or 2+ of 3 or 4 units)
 - if met, entire building treated in low-income program with few LL co-payments
- Share across programs where 1 low-income out of 3 or 4
 - LL gets benefit of no co-payment w/r/t 1 unit
 - Experience with EN+ experimental protocol dividing units between programs?
 - Much easier with common contractor

MORE INFORMATION?

Jerrold Oppenheim

978-283-0897

JerroldOpp@DemocracyAndRegulation.com

ATTACHMENT C - NOTICES TO THE DEPARTMENT

Notice to the Department of March 27 RBWG Stakeholder Session

Notice to the Department of May 1 RBWG Stakeholder Session – conference call

Notice to the Department of August 27 RBWG Stakeholder Session

Notice to the Department of September 18 RBWG Stakeholder Session

Attorneys at Law



Rich May, P.C. 176 Federal Street, Boston, MA 02110

Emmett E. Lyne
Direct Dial (617) 556-3885
elyne@richmaylaw.com

March 15, 2013

BY EMAIL AND U.S. MAIL

Jeffrey M. Leupold, Esq., Hearing Officer
Clayton F. Hale, Esq., Hearing Officer
Jonathan A. Goldberg, Esq., Hearing Officer
Jennifer Turnbull-Houde, Esq., Hearing Officer
Commonwealth of Massachusetts
Department of Public Utilities
One South Station
Boston, MA 02110

Re: 2013-2015 Three-Year Energy Efficiency Plans; D.P.U. 12-100 through D.P.U. 12-111;
Notice and Agenda for Residential Barriers Working Group Meeting on March 27, 2013

Dear Messrs. Leupold, Hale, Goldberg and Ms. Turnbull-Houde:

In the Department's Order of January 31, 2013 approving the three-year energy efficiency plans filed in D.P.U. 12-100 through 12-111 ("Order"), the Department directed Bay State Gas Company, d/b/a Columbia Gas of Massachusetts, The Berkshire Gas Company, Blackstone Gas Company, Boston Gas Company and Colonial Gas Company, each d/b/a National Grid, Fitchburg Gas and Electric Light Company (gas), d/b/a Unitil, NSTAR Gas Company, New England Gas Company, Cape Light Compact, Fitchburg Gas and Electric Light Company (electric) d/b/a Unitil, Massachusetts Electric Company and Nantucket Electric Company each d/b/a National Grid, NSTAR Electric Company, and Western Massachusetts Electric Company (the "Program Administrators") to convene a residential barriers working group and to provide the Department with advance copies of the agenda for its meetings (see Order at 46). Pursuant to the Order, on behalf of the Program Administrators, this letter is intended to provide notice to the Department that a meeting of this working group has been scheduled for March 27, 2013 and to provide formal notice of the agenda for that meeting. The meeting will be held at the offices of Columbia Gas of Massachusetts, 4 Technology Drive, Suite 250, Westborough, MA 01581 from 12:30-2:30. Questions regarding the meeting or requests to participate should be directed directly to Beth Lonergan (Beth.Lonergan@nationalgrid.com; (781) 907-1540). The Program Administrators will provide working straw draft design documents for review prior to the meeting to advance registrants. Invitations for the working

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group have been sent to the Department of Energy Resources, the Office of the Attorney General, representatives of the Green Justice Coalition, LEAN, the Department of Housing and Company Development and the Energy Efficiency Advisory Council's consultant. The goal of the Program Administrators is to have key stakeholders participate, but to keep the working group small enough to maximize efficiency, all consistent with the Order; therefore, only advance registrants for the working group session may attend the March 27, 2013 meeting.

The agenda for the March 27, 2013 meeting is as follows:

12:30-1:00

1. Welcome- Beth Lonergan on behalf of all PAs
2. Introductions
3. Review of DPU Order requirements on Residential Barriers Working Group. PA Report due by September 30, 2013

1:00-2:00

4. Discussion and comments on working straw draft design documents of Efficient Neighborhoods+ Initiative (core area of discussion for this meeting)

2:00-2:30

5. Develop list of takeaways and next steps on Efficient Neighborhoods+ Initiative
6. Discussion of meetings for other items to be addressed by Residential Barriers Working Group per the DPU Order, i.e., overcoming renter/landlord barriers and pre-weatherization barriers

Note: the PAs believe that Efficient Neighborhoods+ Initiative can be an effective tool in both of these two other items, and accordingly are focusing this meeting on this Initiative

7. Next Meeting dates

Attorneys at Law

RichMay

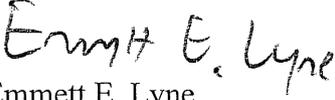
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Please do not hesitate to contact me or any other Program Administrator counsel with any questions you may have relating to this notice.

Very truly yours,


Emmett E. Lyne

cc: Service Lists in D.P.U. 12-100 through 12-111

Emmett E. Lyne
Direct Dial (617) 556-3885
elyne@richmaylaw.com

April 25, 2013

BY EMAIL AND U.S. MAIL

Jeffrey M. Leupold, Esq., Hearing Officer
Clayton F. Hale, Esq., Hearing Officer
Jonathan A. Goldberg, Esq., Hearing Officer
Jennifer Turnbull-Houde, Esq., Hearing Officer
Commonwealth of Massachusetts
Department of Public Utilities
One South Station
Boston, MA 02110

Re: 2013-2015 Three-Year Energy Efficiency Plans; D.P.U. 12-100 through D.P.U. 12-111;
Notice and Agenda for Residential Barriers Working Group Meeting on May 1, 2013

Dear Messrs. Leupold, Hale, Goldberg and Ms. Turnbull-Houde:

In the Department's Order of January 31, 2013 approving the three-year energy efficiency plans filed in D.P.U. 12-100 through 12-111 ("Order"), the Department directed Bay State Gas Company, d/b/a Columbia Gas of Massachusetts, The Berkshire Gas Company, Blackstone Gas Company, Boston Gas Company and Colonial Gas Company, each d/b/a National Grid, Fitchburg Gas and Electric Light Company (gas), d/b/a Unitil, NSTAR Gas Company, New England Gas Company, Cape Light Compact, Fitchburg Gas and Electric Light Company (electric) d/b/a Unitil, Massachusetts Electric Company and Nantucket Electric Company each d/b/a National Grid, NSTAR Electric Company, and Western Massachusetts Electric Company (the "Program Administrators") to convene a residential barriers working group and to provide the Department with advance copies of the agenda for its meetings (see Order at 46). Pursuant to the Order, on behalf of the Program Administrators, this letter is intended to provide notice to the Department that a second meeting of this working group has been scheduled for May 1, 2013 and to provide formal notice of the agenda for that meeting. The meeting will take place via conference call from 10:00-11:00. Questions regarding the meeting or requests to participate should be directed to Beth Lonergan (Beth.Lonergan@nationalgrid.com; (781) 907-1540). Invitations for the working group have been sent to the Department of Energy Resources, the Office of the Attorney General, representatives of the Green Justice Coalition, LEAN, the Department of Housing and Company

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Development and the Energy Efficiency Advisory Council's consultant. The goal of the Program Administrators is to have key stakeholders participate, but to keep the working group small enough to maximize efficiency, all consistent with the Order; therefore, only advance registrants for the working group session may participate in the May 1, 2013 meeting.

The agenda for the May 1, 2013 meeting is as follows:

Welcome and Introductions (10 min)

Update on Pre-Weatherization evaluation results (25 min)

Update on Efficient Neighborhoods+ initiative (25 min)

Please do not hesitate to contact me or any other Program Administrator counsel with any questions you may have relating to this notice.

Very truly yours,



Emmett E. Lyne

cc: Service Lists in D.P.U. 12-100 through 12-111

Emmett E. Lyne
Direct Dial (617) 556-3885
elyne@richmaylaw.com

August 9, 2013

BY EMAIL AND U.S. MAIL

Jeffrey M. Leupold, Esq., Hearing Officer
Clayton F. Hale, Esq., Hearing Officer
Jonathan A. Goldberg, Esq., Hearing Officer
Jennifer Turnbull-Houde, Esq., Hearing Officer
Commonwealth of Massachusetts
Department of Public Utilities
One South Station
Boston, MA 02110

Re: 2013-2015 Three-Year Energy Efficiency Plans; D.P.U. 12-100 through D.P.U. 12-111;
Notice and Agenda for Residential Barriers Working Group Meeting on August 27, 2013

Dear Messrs. Leupold, Hale, Goldberg and Ms. Turnbull-Houde:

In the Department's Order of January 31, 2013 approving the three-year energy efficiency plans filed in D.P.U. 12-100 through 12-111 ("Order"), the Department directed Bay State Gas Company, d/b/a Columbia Gas of Massachusetts, The Berkshire Gas Company, Blackstone Gas Company, Boston Gas Company and Colonial Gas Company, each d/b/a National Grid, Fitchburg Gas and Electric Light Company (gas), d/b/a Unitil, NSTAR Gas Company, New England Gas Company, Cape Light Compact, Fitchburg Gas and Electric Light Company (electric) d/b/a Unitil, Massachusetts Electric Company and Nantucket Electric Company each d/b/a National Grid, NSTAR Electric Company, and Western Massachusetts Electric Company (the "Program Administrators") to convene a residential barriers working group and to provide the Department with advance copies of the agenda for its meetings (see Order at 46). Pursuant to the Order, on behalf of the Program Administrators, this letter is intended to provide notice to the Department that a third meeting of this working group has been scheduled for August 27, 2013 and to provide formal notice of the agenda for that meeting. The meeting will be held at the offices of Columbia Gas of Massachusetts, 4 Technology Drive, Suite 250, Westborough, MA 01581 from 1:00-3:00. Questions regarding the meeting or requests to participate should be directed to Beth Lonergan (Beth.Lonergan@nationalgrid.com; (781) 907-1540). Invitations for the working group have been sent to the Department of Energy Resources, the Office of the Attorney General, representatives of the Green Justice Coalition, LEAN, the

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August 9, 2013

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Department of Housing and Company Development and the Energy Efficiency Advisory Council's consultant. The goal of the Program Administrators is to have key stakeholders participate, but to keep the working group small enough to maximize efficiency, all consistent with the Order. Therefore, only advance registrants for the working group session may participate in the meeting, and the Program Administrators request that each stakeholder send one representative only.

The agenda for the August 27, 2013 meeting is as follows:

Landlord-Tenant Barrier discussion (60 min)

- recap of what PAs have done to address barriers to date
- what PAs are doing in Efficient Neighborhoods+
- Triple decker initiative - Renew Boston

Communities Initiatives (60 min)

- Efficient Neighborhoods+ progress to date
- Pre-weatherization uptake to date

Next Meeting dates

Please do not hesitate to contact me or any other Program Administrator counsel with any questions you may have relating to this notice.

Very truly yours,



Emmett E. Lyne

cc: Service Lists in D.P.U. 12-100 through 12-111

Emmett E. Lyne
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elyne@richmaylaw.com

September 16, 2013

BY EMAIL AND HAND DELIVERY

Jeffrey M. Leupold, Esq., Hearing Officer
Clayton F. Hale, Esq., Hearing Officer
Jonathan A. Goldberg, Esq., Hearing Officer
Commonwealth of Massachusetts
Department of Public Utilities
One South Station
Boston, MA 02110

Re: 2013-2015 Three-Year Energy Efficiency Plans; D.P.U. 12-100 through D.P.U. 12-111;
Notice & Agenda for Residential Barriers Working Group Meeting, September 18, 2013

Dear Messrs. Leupold, Hale, and Goldberg:

In the Department's Order of January 31, 2013 approving the three-year energy efficiency plans filed in D.P.U. 12-100 through 12-111 ("Order"), the Department directed Bay State Gas Company, d/b/a Columbia Gas of Massachusetts, The Berkshire Gas Company, Blackstone Gas Company, Boston Gas Company and Colonial Gas Company, each d/b/a National Grid, Fitchburg Gas and Electric Light Company (gas), d/b/a Unitil, NSTAR Gas Company, New England Gas Company, Cape Light Compact, Fitchburg Gas and Electric Light Company (electric) d/b/a Unitil, Massachusetts Electric Company and Nantucket Electric Company each d/b/a National Grid, NSTAR Electric Company, and Western Massachusetts Electric Company (the "Program Administrators") to convene a residential barriers working group and to provide the Department with advance copies of the agenda for its meetings (see Order at 46). Pursuant to the Order, on behalf of the Program Administrators, this letter is intended to provide notice to the Department that a fourth meeting of this working group has been scheduled for September 18, 2013 and to provide formal notice of the agenda for that meeting. The meeting will be held at the offices of Columbia Gas of Massachusetts, 4 Technology Drive, Suite 250, Westborough, MA 01581 from 10:00-11:30, with an optional call-in number of 866-844-9417; 89130585. Questions regarding the meeting or requests to participate should be directed to Beth Lonergan (Beth.Lonergan@nationalgrid.com; (781) 907-1540). Invitations for the working group have been sent to the Department of Energy Resources, the Office of the Attorney General, representatives of the Green Justice Coalition, LEAN, the

Messrs. Leupold, Hale and Goldberg, Hearing Officers

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Department of Housing and Company Development, National Consumer Law Center, Mass Consumer Energy Alliance, and the Energy Efficiency Advisory Council's consultant. The goal of the Program Administrators is to have key stakeholders participate, but to keep the working group small enough to maximize efficiency, all consistent with the Order. Therefore, only advance registrants for the working group session may participate in the meeting, and the Program Administrators request that each stakeholder send one representative only.

The agenda for the September 18, 2013 meeting is as follows:

Introductions 10:00-10:10

Pre-Weatherization update 10:10-10:30

Efficient Neighborhoods+ update 10:30-10:45

Landlord Tenant Barrier Discussion 10:45-11:30

LEAN (landlord/tenant strategies) 10:45-10:55

Open discussion on Landlord/Tenant Barrier Strategies 10:55-11:30

Please do not hesitate to contact me or any other Program Administrator counsel with any questions you may have relating to this notice.

Very truly yours,

Emmett E. Lyne ^{IPK4}

Emmett E. Lyne

cc: Service Lists in D.P.U. 12-100 through 12-111