

Issue ID	Issue	CIWG Recommendations →						
11	Transitioning very large (and all) customers from fossil fuel-based infrastructure to electrical based infrastructure. Need to address costs of project development, implementation, and operations.	Establish a point of contact from the PAs to review the needs of the site and support long-term master planning and implementation. Form a team that will work together over multiple years to support the transition.	Publish a workflow so customers know whom to contact and the process.	Provide a clear pathway for customers to get questions answered - identify customer point of contact for each project (vendor, PA, etc.) with a specific individual named as the primary resource. Provide an alternate pathway for when the primary contact fails.	Publish a customer journey map that includes critical milestones, roles and responsibilities, time ranges for PA-led steps and includes FAQ's about how to address challenges often faced in project development and implementation.	Share success stories such as case studies that include a clear description of processes	Require all providers doing assessments to look at each end use and the entire energy portfolio of measures for the facility, not just the typical measures	
12	Customers are unaware of eligibility of process-related measures. The time required for PAs to educate customers about these opportunities and getting buy-in is long. (Recommendations include any atypical custom measure)	Tours and videos to show customers successful outside-the-box projects with follow-up to ensure projects are performing at the same level as prior to implementation (no decrease in quality)	Share success stories such as case studies that include a clear description of processes	Education on the custom process and measure eligibility - broader market education of customers				
13	Contractors tend to promote the prescriptive pathway for projects because it is easier. Because the custom pathway is complex, it is often overlooked in favor of the prescriptive and if we want more holistic treatment, this is a challenge. Contractors drive the process for medium and small customers.	Ensure funding is in alignment with desired outcomes, consider options such as contractor incentives to deliver custom projects	Determine whether project expeditors are capturing the wide variety of measures that can qualify, particularly under the custom pathway	Increase awareness of "new" technologies and processes	Simplify the custom pathway process			
14	The timeline for reviews is too long. HVAC projects requiring a lot of engineering and analysis involving multiple parties (TA and PA engineers) can take up to two years.	Establish sunset period for PA review and response on submitted projects like what occurs with renewables projects.	Hold frequent meetings with PA and Technical Assistance vendors to review projects	Streamline (find efficiency, identify where things are overly complex) and clarify processes	Establish milestones and communicate throughout the process	Publish a customer journey map that includes critical milestones, roles and responsibilities, time ranges for PA-led steps and includes FAQ's about how to address challenges often faced in project development and implementation.	Review custom process with PAs and CIWG to have CIWG provide input on the process itself	Consider adopting internal metrics for PA project reviews and customer responses - ranges based on project complexity, recognize and track back-and-forth, promulgate best practices among PAs
15	Lack of consistency between PA offerings and approaches; customers with facilities across multiple PA territories face significant challenges	Why are there separate programs? Establish a single pool of resources - a single program across the state	Municipal Light Plant (MLP) customers who pay an energy efficiency surcharge on natural gas should get services under the programs	PAs should align timing and requirements for approving TA vendors to increase consistency of TA vendors between PAs	Explore whether the existing programs could be offered to MLP territories by the IOUs with cost recovery			

Response ID	CIWG Recommendations	Associated Issues (and Issue IDs) Addressed	PA Response
R1	Establish a point of contact from the PAs to review the needs of the site and support long-term master planning and implementation. Form a team that will work together over multiple years to support the transition.	I1. Transitioning very large (and all) customers from fossil fuel-based infrastructure to electrical based infrastructure. Need to address costs of project development, implementation, and operations.	The lead customer contact for large customers is the electrical PA if applicable (not a municipal electric customer because municipal customers are legislatively not eligible to participate in electric Mass Save programs). Master planning is done collaboratively (with gas and electric PA when applicable). If the customer would like to pursue electrification, this should be part of the master plan. The Electric PA takes the lead in dual fuel custom projects. Should the customer choose to pursue electrification and the customer is in a Gas PA territory, the Gas PA takes the lead on this effort, again working collaboratively with the electric PA if applicable. The sales representatives/project managers are the point(s) of contact for the customers.
R2	Provide a clear workflow so customers know whom to contact and the process. Include a customer journey map that includes critical milestones, roles and responsibilities, time ranges for PA-led steps and include FAQs about how to address challenges often faced in project development and implementation. Provide education on the custom process and measure eligibility - broader market education of customers	I1, I2. Customers are unaware of eligibility of process-related measures. The time required for PAs to educate customers about these opportunities and getting buy-in is long. (Recommendations include any atypical custom measure), I4. The timeline for reviews is too long. HVAC projects requiring a lot of engineering and analysis involving multiple parties (TA and PA engineers) can take up to two years.	Having a publicly facing generalized custom project process (applicable to all customers, including large medium and small) highlighting where in the process the customer may decide to pursue electrification is feasible. At any stage in the project workflow, contacting the sales executive/project manager would be the first step. There exists a broad one on the website already (under "How to Participate" https://www.massave.com/en/business/programs-and-services/custom-incentives-and-technical-support/custom-incentives), but this can be expounded upon. The scale and scope of all custom projects varies widely, so timelines, etc. is not something that will be compatible across projects because of the significant amount of variation. Customers wishing to pursue large scale electrification would likely mention this to their PAs either before or after an energy assessment. At this point, a scoping study would then be pursued. This step can also be included in the publicly facing custom project workflow. In this process and in our conversations, we also want to be sure not to conflate electrification (the decision to transfer equipment from fossil fuels to electricity) with efficiency (saving energy regardless of type). Making the decision to start a custom project to improve the efficiency of a boiler should be decided after a customer has made decisions about their electrification plans. Similarly, starting a custom project to improve conditioned air rates for later right sizing a VRF system would also be a custom efficiency project associated with the customer's pursuit of electrification. It is agreed more clarity and resources on the differences between efficiency and electrification could be made available on the website and in discussions with customers.
R3	Provide a clear pathway for customers to get questions answered - identify customer point of contact for each project (vendor, PA, etc.) with a specific individual named as the primary resource. Provide an alternate pathway for when the primary contact fails.	I1	For large customers working on custom energy efficiency projects which may or may not include electrification, the PA project manager/sales representative should be the initial point of contact if a customer has concerns. The "Find your Sponsor" portion of the website (https://www.massave.com/en/find-your-sponsor) can then intake and escalate the customer's concerns and ensure that the customer's needs are being addressed if contacting the project manager/sales representative has been insufficient.
R4	Share success stories such as case studies that include a clear description of processes	I1, I2	The PAs would like to develop many more case studies. There have not been sufficient nor significant custom electrification projects implemented to date to have these available, but case studies on heat pump installations and one other electrification are in progress. As mentioned above, while case studies and projects are underway, more resources could be made available regarding the differences between efficiency and electrification as well as on the topic of electrification itself. Many case studies on the website do include custom projects and existing conditions. As mentioned above, the PAs are however looking to increase the number of electrification case studies. Also as mentioned above, an insufficient number of custom electrification projects have been completed to date, but we look forward to incorporating more studies and resources to share as time progresses.
R5	Require all providers doing assessments to look at each end use and the entire energy portfolio of measures for the facility, not just the typical measures.	I1	The PAs want to work with the larger customers to make sure the assessment and master planning meet the customer needs. The assessment is a starting point for larger customers to sit down and talk with the PAs to understand their long term needs. Large scale electrification is always an option and comprehensiveness is emphasized. Relative to new measure opportunities, provided the introduction of advanced electrification and decarbonization in the 2022-2024 plan, the PAs have been leading the way in terms of understanding the technologies available for electrification and decarbonization. The PAs have been introducing new measures to address these needs and providing vendor training on these offers, but this does take a little while to translate into a broader understanding of appropriate implementation conditions. Further, because these topics are so nascent, we admit we have not done a good job of sharing this understanding more publicly and agree there should be greater visibility on the website at minimum. This said, when a specific measure is not available to accomplish a desired customer energy savings need, there are other available pathways for exploring deeper efficiency or electrification opportunities like retrocommissioning or scoping studies. Specific to energy assessors' ability to address a comprehensive list of measures, vendor training is on a continual and as needed basis. We have had a vendor training late fall for a deeper dive on electrification with an additional offering in January. Based on vendor feedback, additional trainings for weatherization and industrial process measure identification are also in development. The vendor pool for industrial process work is limited, but something the PAs are continually looking to expand upon. Also related to energy assessment contractors and contractors overall, the PAs have a general process for understanding vendor performance. Collectively and as individual PAs we establish whether compliance with vendor contract terms are being met as it relates to both the quantity and quality of the work undertaken. This said, energy measure implementation is an open market and vendors selected by the customer have their work inspected relative to the project energy savings parameters. The PAs inform customers about the results of these inspections and encourage their follow up with the vendor if the parameters are not met. Other aspects of the project outside of the savings parameters would require customer follow up should it be determined a customer's needs are not met.
R6	Provide tours and videos to show customers successful outside-the-box projects with follow-up to ensure projects are performing at the same level as prior to implementation (no decrease in quality)	I2	Unique idea re: tours. For customers looking to participate in industry specific events like these, there are also avenues like ASHRAE, IEEE, AEE, ACEE, I2SL (for labs), and more. This is something that could be listed on the website on the "Partners" page or elsewhere on the website as a further resource for electrification or EE options. Relative to persistence, MRDs are used for custom projects and involve performance monitoring after implementation. For turnkey and prescriptive projects where MRDs are not involved, inspections are conducted for compliance with the scope of work associated with the energy savings parameters. PAs do, as seen in new construction, encourage customers to seek additional outside commissioning, but it is the customer's choice as to whether they want to pursue additional project QA/QC. Further, in terms of persistence in savings, there are Evaluations conducted on PA projects annually that impact the savings realization rates (savings the PAs can claim relative to what was initially projected). Typically, for these evaluations there is a mixed response; some customers see the follow up on projects as burdensome, while others are more committed to understanding if their savings has persisted.

R7	Ensure funding is in alignment with desired outcomes, consider options such as contractor incentives to deliver custom projects.	I3. Contractors tend to promote the prescriptive pathway for projects because it is easier. Because the custom pathway is complex, it is often overlooked in favor of the prescriptive and if we want more holistic treatment, this is a challenge. Contractors drive the process for medium and small customers.	Funding is the term in question here. If the term funding is analogous with incentives, the PAs desired outcomes are to claim the energy savings associated with well implemented projects. Incentives are aligned with the amount of energy savings delivered. Further, if third party contractors are engaged for the purpose of project procurement, they are also incentivized by the amount of energy savings delivered. Additional EE funding resources are in the process of being posted on the Mass Save website. Also, customers wishing to pursue energy efficiency to a greater extent can reach out to their PA or associated trade ally via the "Contact your Sponsor" link on the Mass Save website.
R8	Determine whether project expeditors are capturing the wide variety of measures that can qualify, particularly under the custom pathway	I3	Please refer to responses above.
R9	Increase awareness of "new" technologies and processes	I3	This recommendation is not clear. If by new commercial technologies to the MA electrification and decarbonization serving the EE market, see response re: the introduction of new measures associated with the 3-year plan above. If a new technology for the commercial or residential sector, there is the Mass Technical Assessment Committee (MTAC) that assesses new technologies for energy efficiency and determines their appropriateness for use in the C&I or residential markets.
R10	Simplify the custom pathway process Streamline (find efficiency, identify where things are overly complex) and clarify processes	I3, I4	PAs have agreed to share custom project process as above. Substeps/checklist requirements vary depending on the project pursued.
R11	Establish sunset period for PA review and response on submitted projects like what occurs with renewables projects.	I4	Having a publicly facing generalized process is feasible and publishing this process publicly is reasonable. The scale and scope of each custom project varies widely (comparing electrification to lighting), so timelines, milestones, etc. is not something that will be compatible across projects. As a result, timelines is something that can be communicated more readily to customers, but not something that can be concretely shared more broadly because of the significant amount of variation. As mentioned above, customers should never hesitate to reach out to their Program Administrator if there are concerns about a project. This is a customer service topic that requires regular communication given project circumstances. As a reminder vendors may or may not be contracted with the PAs and so sometimes the vendors are selected and working directly for the customer.
R12	Hold frequent meetings with PA and Technical Assistance vendors to review projects	I4	PAs continue to emphasize the importance of communication at each project step and customers should never hesitate to request meetings with the TA and PA as desired. The PA sales rep/project manager should be contacted first and then escalated as mentioned above should these requests not be met to desired level. This is the standard communication channel that has been committed to. For TA study vendors, there is the contract compliance aspect of performance mentioned above. There is also a performance assessment component embedded in a custom impact evaluation. Otherwise, a process evaluation has not recently been done on Technical Assistance vendors. Outside factors like contractor materials, labor shortages and outsourced vendor reviews do impact the timelines of project beyond PA control, but it is agreed continued focus on communication is important. As mentioned in the stakeholder hour, should the customer feel they require greater communication, there should be no hesitation to reach out to the PAs to ask where the project stands.
R13	Review custom process with PAs and CIWG to have CIWG provide input on the process itself	I4	Custom workflow has been shared with the C&I WG in kickoff meeting, as mentioned a broader timeline and explanation of milestones can also be shared. Whether this gets further discussed at future C&I WG meetings is the decision of the C&I WG membership
R14	Consider adopting internal metrics for PA project reviews and customer responses - ranges based on project complexity, recognize and track back-and-forth, promulgate best practices among PAs	I4	Please see applicable responses above.
R15	Why are there separate programs? Establish a single pool of resources - a single program across the state	I5 Lack of consistency between PA offerings and approaches; customers with facilities across multiple PA territories face significant challenges	The Sponsors of Mass Save are structured based on legislation. The Program Sponsors/Administrators work collaboratively based on our respective budgets to accomplish our collective goals. Custom or prescriptive offers like retrofit rebates, retrocommissioning, and new construction are all approached the same across the state and as defined on the website. We collectively have similar applications and tools. Though some PAs have dedicated sales, EECs or technical staff, while others have combined roles, the customer engagement for offers is the same. There are different vendors across PAs that help accomplish different tasks in partnership with the Program Administrators. This includes those that do energy assessments, savings calculations, etc. Resources is a broad term and so further understanding what is meant here may lead to improved response to this recommendation.
R16	Municipal Light Plant (MLP) customers who pay an energy efficiency surcharge on natural gas should get services under the programs	I5	All PA customers are addressed the same. There is no difference in the process to engage MLP customers or customers with propane and oil.
R17	PAs should align timing and requirements for approving TA vendors to increase consistency of TA vendors between PAs	I5	Relative to vendor oversight, compliance with contract terms with PAs, or custom project timing, please refer to the responses above. In terms of variance in the contracting a bench of vendors to conduct TA studies for the PAs, the contract schedule is dependent on the respective PA parent companies and timing of contract inception. Given that this is an ongoing process, it does not impact the ability of TA vendors to conduct work.
R18	Explore whether the existing programs could be offered to MLP territories by the IOUs with cost recovery	I5	This would require legislation to change for the PAs to pursue.