Massachusetts Department of Energy Resources

Advancing Massachusetts Power Program Manual

December 2, 2025

MASSACHUSETTS
DEPARTMENT OF
ENERGY RESOURCES

CADMUS

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Acronyms List

Acronym	Definition
AMP	Advancing Massachusetts Power
BESS	Battery Energy Storage System
BTM	Behind-the-Meter
CRD	Certification Requirements Decision
COD	Commercial Operation Date
CPS	Clean Peak Energy Standard
CR	Community Resilience
DOER	Department of Energy Resources
EEA	Energy and Environmental Affairs
EJ	Environmental Justice (community)
EPC	Engineering, Procurement, and Construction
ESS	Energy Storage System
FTM	Front-of-the-Meter
GHG	Greenhouse Gas
ISA	Interconnection Service Agreement
ISO-NE	Independent System Operator – New England
kW	Kilowatt
kWh	Kilowatt-hour
LDES	Long-Duration Energy Storage
MDES	Mid-Duration Energy Storage
MLP	Municipal Lighting Plant
MW	Megawatt
MWh	Megawatt-hour
NFPA	National Fire Protection Association
PTO	Permission to Operate
PV	Photovoltaic (solar)
RTE	Round-trip Efficiency
SMART	Solar Massachusetts Renewable Target

1. Introduction

1.1. About the Massachusetts Department of Energy Resources

The mission of the Massachusetts Department of Energy Resources (DOER) is to create a clean, affordable, resilient, and equitable energy future for all in the Commonwealth.

As the State Energy Office, DOER is the primary energy policy agency for the Commonwealth. DOER supports the Commonwealth's clean energy goals as part of a comprehensive Administration-wide response to the threat of climate change. DOER focuses on transitioning our energy supply to lower emissions and costs, reducing and shaping energy demand, and improving our energy system infrastructure.

To meet its objectives, DOER connects and collaborates with energy stakeholders to develop effective policy implemented through planning, regulation, and providing funding. DOER provides tools to individuals, organizations, and communities to support their clean energy goals and is committed to transparency and education, supporting accessible energy information and knowledge.

1.2. Advancing Massachusetts Power Background

On January 4, 2024, DOER released *Charging Forward: Energy Storage in a Net Zero Commonwealth*,[1] as directed by Section 80 (b) of the 2022 Climate Act. This study includes the following analyses:

- An overview of the existing energy storage market in the Commonwealth
- A market report focused on emerging mid-duration energy storage (MDES) and long-duration energy storage (LDES) technologies
- A study evaluating the potential benefits of MDES and LDES technologies for Massachusetts ratepayers, as the Commonwealth works toward the goals outlined in the 2050 Clean Energy and Climate Plan

Additionally, this study was accompanied by the DOER's *Charging Forward: Energy Storage in a Net Zero Commonwealth* report. The report's topline conclusion is that "the deployment and use of energy storage systems is a critical and cost-effective strategy for the Commonwealth to encourage in meeting its goals under the 2050 Clean Energy and Climate Plan."[2] The report also identified barriers to the deployment of energy storage and provided

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[1] Energy+Environmental Economics (E3). December 2023. *Charging Forward: Energy Storage in a Net Zero Commonwealth*. Prepared for Massachusetts Clean Energy Center and DOER. https://www.mass.gov/doc/charging-forward-energy-storage-in-a-net-zero-commonwealth/download

[2] Ibid, p. 3.

a suite of policy levers aimed at lowering deployment barriers. These levers included the recommendation to create a $50 million energy storage grant program "targeted toward specific use cases, to improve energy storage siting, and to lower commercialization barriers for mid- and long-duration energy storage technologies."[3] To carry out its recommendation in *Charging Forward*, DOER created the $50 million Advancing Massachusetts Power (AMP) program.

> The AMP program's objective is to **accelerate the equitable deployment of safe energy storage systems** (ESS) across the Commonwealth by **prioritizing investments that deliver resilience, pollution reduction, economic opportunity, and health benefits** to the Commonwealth—especially in communities facing the greatest environmental, health, and economic burdens.

The AMP program is designed to provide incremental funding for a small group of projects and, as such, cannot be expected to close potential funding gaps for all projects or use cases. It is not intended to replace existing funding streams; rather, its purpose is to provide supplemental funding to a select group of projects with characteristics that do not fit or are not fully served by the current market structures. The AMP program is not intended to address the following external factors and existing mechanisms:

- Uncertainties regarding tariffs, federal grants, or tax credits
- Utility interconnection processes
- Independent System Operator – New England (ISO-NE) market mechanisms
- Other state programs and mechanisms: Solar Massachusetts Renewable Target (SMART), Clean Peak Energy Standard (CPS), or ConnectedSolutions

In awarding grant funding, DOER will seek to balance program impact with project risk. DOER aims to award grants that "move the needle" on projects that need funding and would not have been built without program support.

1.3. Program Manual Purpose

The remainder of this program manual provides an overview of the AMP program and corresponding tracks, project eligibility and minimum requirements, application process and requirements, application evaluation criteria, and the general AMP Energy Storage Grant Program Conditions.

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[3] Ibid, p. 14.

2. Program Overview

DOER intends to award approximately $47 million in grants through the AMP program to support the development of ESS projects under three program tracks:[4]

- Community Resilience
  - Path 1: Project implementation
  - Path 2: Preconstruction support
- LDES Commercialization
- Safety and Education

Please note that single-family residential projects are not eligible for funding through the AMP program. However, the program is open to other types of residential projects, such as affordable multifamily buildings or community-based residences. In these cases, projects should be limited to the common or community areas of such buildings.

The following section (2.1) provides an overview of program funding.

2.1. Funding Overview

Of the $50 million allocated to the AMP program, DOER intends to award approximately $47 million in grants to recipients.

As described in greater detail below, DOER anticipates a staggered funding process consisting of two application rounds under this program. The first round of applications will include funding opportunities for the following categories:

- Community Resilience (Path 1) Implementation Projects, which are ready to proceed directly to development
- Community Resilience (Path 2) Preconstruction Projects, which seek support for feasibility studies to assess project viability prior to implementation
- LDES Commercialization
- Safety and Education

All Community Resilience Path 2 applicants must apply during this first round to be eligible for feasibility study funding.

A subsequent application round will be available only to Community Resilience Path 2 awardees who received and completed feasibility studies through the initial round. These applicants may then apply for implementation funding (Phase 2 awards) to support project development based on the results of their completed studies.

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[4] DOER is reserving approximately $3 million for consulting and administrative support, as well as technical review and assistance, for the duration of the grant period.

Between the two rounds of awards, DOER expects to exhaust available funding. If it does not award the full amount of funding to selected projects, it may consider an additional funding round. After reviewing applications, DOER will consider funding allocation based on the number of applications received in each category, the amounts of funding requested, and the final funding decisions.

At this time, DOER envisions awarding grants in approximately the number and value outlined in Table 1.

Table 1. Approximate Funding and Project Volume by Track

Funding Track	Approximate Budget	Maximum Grant/Project	Estimated # of Projects
Community Resilience	$22-26 million	$2.5 million	10-30
LDES Commercialization	$20-22 million	$5 million	3-5
Safety and Education	$2-3 million	$800,000	5-20

At its discretion, DOER may award up to $5 million in funding to projects developed in a Municipal Lighting Plant's (MLP's) service territory, either by the MLP itself or by an independent customer served by the MLP.

3. Community Resilience Track

3.1. Community Resilience Track Overview

3.1.1. Track Objective

To support the installation of small- and medium-sized behind-the-meter (BTM) ESS that can provide power during an outage to critical facilities or community resilience hubs that serve a community or region, with an emphasis on resilience and community benefits.

3.1.2. Track Paths

The Community Resilience (CR) track will have two opportunities to pursue funding: an initial project implementation funding round (referred to as CR Path 1) and a parallel track in which applicants can seek preconstruction support in the form of a feasibility study to enable objective decision making, followed by a subsequent project implementation round (referred to as CR Path 2). If the feasibility study indicates the technical and economic potential for ESS installation, participants in CR Path 2 will be expected to use the study findings to develop a project proposal for funding under CR Path 2. Refer to *Application Timeline and Process* for details.

DOER intends to reserve up to $5 million from the overall CR budget so that CR Path 2 awardees can receive project implementation funding. However, as DOER intends to support approximately 15-20 feasibility studies, the average grant size for Phase 2 may be smaller than that for applicants who apply to CR Path 1 in the first funding round. Applicants should bear this in mind when seeking preconstruction support.

Please also note that Phase 2 is a competitive grant, and as such, an award of preconstruction support is *not* a guarantee of future project funding.

3.2. Community Resilience Path 1: Project Implementation Grant

3.2.1. Path 1 Overview

Path 1 Objective

To support the installation of small- and medium-sized BTM storage systems with an emphasis on resilience and community benefits.

Path 1 Offering

- Grant for up to 75% of project cost (not to exceed $2.5M)
- Technical assistance from the program administration team

Projects that are located in or serve Environmental Justice (EJ) populations are eligible for awards covering a higher share of project costs. Please see *Appendix B: Community Resilience Equity Cost Share* for more details.

Due to the wide range of project sizes and needs of facilities, DOER expects that many host customers' resilience needs may be met by projects with smaller capacities and total project costs, and may request funding amounts less than the total funding cap.

Path 1 Example Project

A middle school located in an EJ community proposes to install a 250 kW/500 kWh lithium-ion battery to enable it to participate in programs and markets and provide backup power onsite in the case of an outage. The battery system would displace existing fossil fuel generators and be operational by December 31, 2028.

3.2.2. Path 1 Project Eligibility

The CR Path 1 Project Implementation grant is open to all applicants or host customers with a facility that serves the community in which it is located. This broad definition is intended to enable a wide range of applicants to seek funding without prescribing a list of customer types or use cases, which will inevitably be incomplete. However, the primary goal of the CR track is to promote the development of resilience *for* and *within* communities. While for-profit entities and businesses are not excluded from applying or being part of project teams, DOER expects that most successful applicants will be either municipal entities or nonprofit organizations with public-facing operations and/or facilities that are generally open to the public. Prospective applicants should consider this when designing their projects and forming teams.

To apply for grant funding under the CR track, projects must meet the following criteria:

- The project must be **physically located in Massachusetts** and be **interconnected to the distribution system** of its applicable utility. Off-grid projects will not be considered.
- Proposed ESS must have a BTM project configuration to be eligible to apply.
- The program is open to any ESS technology that provides electric grid services, excluding open-loop pumped hydro.
- The project site must be publicly owned or a public-serving facility.
- To provide resilience services to host customers and the larger community, ESS must have islanding capabilities, allowing the site to operate during an outage.
- The project must have site control (selected site with permission from the owner) at the time of application.

- Equipment proposed for funded projects must meet the following minimum eligibility requirements. In cases where there is conflict between these requirements and applicable codes for the project jurisdiction, the more stringent requirement shall govern. Note that proposed equipment that lacks the required listings outlined in Table 2 may be approved at DOER's sole discretion. In these cases, however, the relevant components must be fully compliant prior to the start of installation work, and the applicant should provide a brief narrative explaining the current testing/certification status and anticipated timeline.

Table 2. CR Equipment Eligibility Requirements

Component	Required Listing	Discussion
Solar Photovoltaic (PV) Modules	UL 61730	While AMP grant funding will not cover solar PV modules or racking, projects that may include integrated solar and storage must meet applicable technical requirements.
Solar Racking	UL 2703	N/A
Inverters, Power Conversion Systems, and Microgrid Interconnect Devices	UL 1741, UL 1741SB	Note that multimode inverters intended for islanding operation shall also be listed to UL 1741 Certification Requirements Decision (CRD) for Multimode.
Energy Storage Systems	UL 9540	Note that UL 9540 incorporates subordinate standards requirements, such as applicable testing to UL 9540A and compliance of cells and battery modules with UL 1973. Explosion control, per National Fire Protection Association (NFPA) 68, NFPA 69, or other approved means, is also included in the UL 9540 Listing. In addition, note that use of an ESS listed to UL 9540 in a manner inconsistent with its listing may initiate a requirement for Field Listing.

- In addition to the use of compliant equipment on all AMP-funded projects, by participating in the program all applicants agree to abide by all applicable codes. In particular, compliance with the Massachusetts Fire Code (527 CMR 1) is required (see energy storage requirements in Chapter 52, in particular). DOER notes that this code incorporates many of the requirements of NFPA 855 and applicants are encouraged to carefully review both the Massachusetts Fire Code and the NFPA 855 standard to ensure compliance with all applicable requirements. DOER and its technical team will review projects for code compliance prior to award of grant payments for project completion. Please note that while not required, DOER strongly recommends that projects comply with the 2026 edition of the NFPA 855 standard.

The following projects are **not eligible** for the AMP program:

- Projects that are owned or developed by one of the three investor-owned electric distribution companies (National Grid, Eversource, or Unitil)
- Projects that are part of a solar PV installation, which require the installation of energy storage as a condition for receiving SMART incentives
- Projects that intend to enroll in ConnectedSolutions
- Projects with system sizes greater than or equal to 500 kW that have submitted 25% payment as part of the interconnection process prior to December 2, 2025.
- Projects that intend to submit a bid under any of the Commonwealth's 83E energy storage procurements
- Projects submitted by communities not in compliance with the Massachusetts Bay Transportation Authority (MBTA) Communities Act as determined by the Executive Office of Housing and Livable Communities
- Single-family residential installations.[5]

While projects are not required to have submitted an Interconnection Service Agreement (ISA) to apply for funding under the CR track, projects that have initiated the interconnection process or can provide information on the level of review and expected timeline for their project may be scored more favorably (see *Path 1 Evaluation Criteria*).

Please contact customerservice@ampmass.com or (877) 238-0076 with questions about specific project eligibility prior to applying.

Applicant Eligibility and Teaming Arrangements

DOER's expectation is that ESS project proposals will consist of a developer and engineering, procurement, and construction (EPC) firm that will design and install the ESS on behalf of a host customer. However, DOER is largely agnostic as to the business arrangement between the developer and host customer and notes that projects which are owned by the developer and for which the host customer enters into a shared savings/Power Purchase Agreement contract *are* eligible. Projects where grant funds reduce costs for the host customer or where more of the benefits flow to the host will be scored more favorably. Applicants interested in proposing projects with unconventional business relationships between the developer and host customer are encouraged to reach out with questions prior to applying.

Project Timing

When proposing projects, applicants should consider the stage of development that their project is in and the likelihood that the project will become operational by the end of the grant term.

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[5] Projects at multifamily residential buildings proposing to install BTM ESS associated with a common space account *are* eligible. The AMP program will not fund projects that serve individually metered residential units.

3.2.3. Path 1 Evaluation Criteria

DOER will review applications for CR Path 1 according to the following criteria:

Table 3. CR Path 1 Evaluation Criteria

Criteria Category	Category Weight	Criteria Subcategory
EJ Community screening	5%	N/A
Overview	0%	Proposal overview
Project viability	18%	Applicant /developer relationship and experience
		Interconnection outlook
Economic viability	27%	Cost efficiency (total proposed project cost/kWh of nameplate ESS capacity)
		Finance model/*pro forma*
		Project budget
		Project operation plan
Technical viability	16%	Technological validation
		Technology suitability
		System lifetime maintenance plan
		Safety
Benefits	34%	Community benefits
		Resilience benefits
		Community engagement and partnership structure
		Innovation

Resilience

DOER will not consider *grid resiliency* benefits when evaluating applications. DOER acknowledges that there may be such benefits associated with the dispatch of ESS under certain grid conditions, especially as it relates to the integration of renewables on the ISO-NE grid. DOER also acknowledges that there may be distribution or utility benefits related to the dispatch of energy storage on certain feeders or at certain times.

However, the conditions under which these benefits may accrue are largely based on future grid conditions and/or on conditions that vary significantly by location and time. It is beyond the scope of this grant initiative to evaluate the benefits associated with such value streams as they are created or enabled by an individual ESS installation.

Pollution Reduction/Health Benefits

Applicants are not required to model or quantify greenhouse gas (GHG) or criteria air pollution reductions resulting from the specific dispatch strategy of a project at the time it is proposed.

As with grid resilience, the ability of an individual BTM ESS to generate verified reductions in GHG or criteria air pollution relies significantly on projections and forecasts of the grid's

overall emissions mix. Where applicable, applicants are encouraged to speak about the benefits associated with the displacement of onsite combustion equipment, where relevant.

3.2.4. Path 1 Application Elements

The application will consist of six elements: a project narrative, a work plan, a budget, a *pro forma*, site control, and letters of intent and support. Details on each follow below.

Project Narrative

The application will consist of a project narrative with the following sections:

- EJ narrative (if applicable)
- Overview
- Project viability
- Technical viability
- Economic viability
- Benefits

Project Work Plan

Applicants should describe the proposed development and construction timeline, including key milestones, using the template provided. Project work plans should not exceed one page.

DOER will review project work plans for feasibility and reasonableness, based on the provision of the best information available at the time of application. DOER understands that elements of the project timeline, especially the interconnection process, are external to the applicant and project development team. However, the proposed project work plan should reflect the timeline that is most realistic, not simply one that is ideal. Where appropriate, applicants should describe contingency plans and build in buffer time to account for the real possibility of delays in permitting, interconnection, and construction.

Project Budget

Applicants should provide the project budget using the template provided. The project budget should outline all eligible project costs expected to be needed for the development and construction of the ESS. The project budget should not include ineligible costs as DOER notes that the grant award will only be based on eligible project costs. Please refer to Appendix A for a more detailed breakdown of eligible and ineligible costs.

Eligible project costs include the following:

- All EPC cost components
- Engineering studies
- Costs associated with community outreach and education
- Costs associated with host customer project management

Project Pro Forma

Applicants should provide project *pro forma inputs* using the template provided.

DOER expects that, to the greatest degree possible, ESS projects applying for grant funding will take advantage of existing programs and value streams available in Massachusetts. This includes Clean Peak Energy Standard and SMART, as well as demand charge management, and energy and/or capacity market participation, as appropriate. As noted previously, participants must pledge not to participate in ConnectedSolutions when their projects become operational.

While DOER acknowledges that not every system may be able to participate in every program or mechanism, either due to eligibility or tariff restrictions, or due to conflicting dispatch signals, applicants should list the programs and markets the ESS will participate in and should also provide a description of the ESS's dispatch strategy in their application.

Site Control

Applicants should provide proof of site control using the template provided or equivalent documentation.

Letters of Intent and Support

Applicants must provide at least one signed letter of intent documenting the existence of a business relationship between the host customer and the ESS installer or developer. Other project partners may provide formal letters of intent, but these are not required. Additionally, any letters of support from community members or organizations may also be appended; these are also not required.

3.2.5. Path 1 Participation Requirements

Awarded project must adhere to the following terms during and after the grant period:

- Participation in Clean Peak Energy Standard
- Achievement of commercial operation date (COD) by December 31, 2030
- Agreement not to participate in ConnectedSolutions
- Annual reporting for three years once the project is operational, including the following components:
  - Submittal of operational data on system performance to DOER for three years from the date of COD, including a minimum granularity of 15-minute interval data on battery charge/discharge capacity and any parasitic loads while the system is idle.
  - Narrative on qualitative project performance (e.g., services project is providing to the community, outreach to the community, etc.)
- Community engagement and safety plans

- As part of the proposed project costs, awardees must include a long-term service agreement with the ESS OEM, with a minimum duration of five years, which ensures that the system is operational
- Quarterly progress reporting during grant term—awarded projects will submit a brief, narrative report to DOER that provides updates on project status and progress, including the following, as appropriate:
  - Engineering and design
  - Permitting and community engagement
  - Procurement and finance
  - Construction
  - Commissioning
- Material changes to scope and budget—if the applicant proposes a substantive change to the scope of the project (i.e., ESS capacity, duration, or technology) or expects project costs to differ from more than 10% from those submitted in the most recent budget document, the applicant must submit a new budget outlining the new cost estimates
  - If a grantee proposes substantive changes to their originally proposed project or experiences significant increases or decreases in project costs, DOER must review proposed changes to scope and budget and may, at its discretion, amend or cancel grant agreements. While DOER will make every effort to work with grantees to navigate changes to project scope and budget, DOER must also ensure that grant funding is spent on projects that are likely to be constructed and become operational. If costs increase, DOER may be unable to commit to increases in grant funding.

- Grant funding provided on a milestone-based disbursement schedule:
  - Execution of the award agreement and provision of project plans and documentation of initiation of the interconnection process
    - 5% of the grant award, not to exceed $100,000
  - Execution of ISA with EDC/Notice to Proceed with construction
    - 40% of grant award
  - Major equipment delivery
    - 40% of grant award
  - Final completion, with utility Permission to Operate (PTO) documentation
    - 15% of grant award

3.3. Community Resilience Path 2: Preconstruction Support

3.3.1. Path 2 Overview

Path 2 Objective

Assist applicants in identifying and assessing the feasibility of energy storage projects that aim to provide community resilience and better prepare them to pursue follow-on implementation funding.

Path 2 Offering

DOER recognizes that some interested applicants may not be prepared to engage with an installation contractor and submit a full application without further investigation. DOER plans to provide feasibility studies, via the AMP program team, to evaluate the potential for ESS to provide value to the customer and the broader community. These studies will provide impartial advice on technology, duration, critical loads, resilience needs, value streams, and ownership options.

Preconstruction support is intended to assist prospective applicants in arriving at a go or no-go decision to engage with an installer or developer to pursue a project and submit an application for grant funding.

As such, the feasibility study will provide directional assessment of the technical potential and equipment specification for an energy storage system, as well as a rough estimate of project costs and revenue streams. It will *not* provide the applicant with a complete system design or a comprehensive financial analysis. DOER's expectation is that, should the feasibility study demonstrate project feasibility, host customers will engage with installers to develop a complete project scope and application.

Please note that while the feasibility study will include investigation of solar PV potential, CR Path 2 funding received after the fact for project implementation will not cover any solar PV costs other than those related to retrofit or solar and storage costs specified in *Appendix A: Cost Breakdown*.

The CR Path 2 offering includes the following services:

- Feasibility study from program administration team, including the following components:
  - Introduction call and interview with applicant
  - Preliminary site visit
  - Review of existing electrical infrastructure
  - Review of utility bills, available load profiles, historical usage, and utility rate structure

- Identification of critical loads and an estimate of the energy and power usage of those loads
- Development of possible battery energy storage system (BESS) system size options to support critical loads
- Review of solar PV potential and analysis using Helioscope software
- Development of preliminary (30%) system design
- Development of project *pro forma*

- Report write-up with findings and recommendations

Path 2 Example Project

A local government is interested in installing solar and an ESS at a municipal building. The building is in an EJ community, and the building owner is interested in using the site as a storm shelter for community members during extended power outages. Before reaching out to a developer, the municipality would like a feasibility study performed to assess the cost and benefit of installing the system.

3.3.2. Path 2 Project Eligibility

To be eligible for preconstruction support under the CR track, applicants must demonstrate that they face significant barriers to the planning and evaluation of ESS at their building or facility, which has prevented them from evaluating energy storage prior to the announcement of AMP funding.

Proposed site and project must conform to all eligibility requirements under CR Path 1.

Projects submitted by communities not in compliance with the Massachusetts Bay Transportation Authority (MBTA) Communities Act as determined by the Executive Office of Housing and Livable Communities are *not* eligible for grant funding.

Please contact customerservice@ampmass.com or (877) 238-0076 with questions about specific project eligibility prior to applying.

3.3.3. Path 2 Evaluation Criteria

Please note that applications that do not meet minimum eligibility requirements, or which are received after the application deadline, may not be reviewed.

Table 4 lists the criteria DOER will review to evaluate applications for CR Path 2.

Table 4. CR Path 2 Evaluation Criteria

Criteria Category	Category Weight	Criteria Subcategory
EJ Community screening	5%	N/A
Overview	33%	Proposal overview
		Explanation of barriers

		Next steps
Technical viability	17%	Technical feasibility
Benefits	45%	Community benefits
		Resilience benefits
		Community engagement and partnership structure

3.3.4. Path 2 Application Elements

The application will consist of a project narrative with the following sections:

- EJ narrative (if applicable)
- Overview
- Technical viability
- Benefits

Applicants may choose to provide the following documents in support of their applications, but these are not required:

- Formal letters of intent or support from project partners or community members/organizations
- Site layout or diagram of the facility where the ESS is proposed to be installed

3.3.5. Path 2 Participation Requirements

Awarded project must adhere to the following terms during and after the grant period:

- Design for participation in markets and programs, which include Clean Peak Standard, ISO-NE Forward Capacity Market, Demand Charge Management, SMART ESS Adder, etc.
- If a grantee proposes substantive changes to their originally proposed project or experiences significant increases or decreases in project costs, DOER must review proposed changes to scope and budget and may, at its discretion, amend or cancel grant agreements. While DOER will make every effort to work with grantees to navigate changes to project scope and budget, DOER must also ensure that grant funding is spent on projects that are likely to be constructed and become operational. In the event that costs increase, DOER may be unable to commit to increases in grant funding.

4. LDES Commercialization Track

4.1. Long-Duration Energy Storage Commercialization Track

4.1.1. Track Objective

To promote the near-term deployment and commercialization of 10-plus hour LDES projects to de-risk non-commercialized technologies and expand reliable storage and safe operation of demonstrated use cases.

4.1.2. Track Offering

- Grant for 50% of the total project cost (not to exceed $5M) to support deployment at a site
- Technical assistance from the program administration team

4.1.3. Track Example Project

A community hospital located in an EJ community is working with a developer to install a 200 kW/2 MWh zinc battery ESS. The ESS will be used to provide backup power during outages and offset existing fossil fuel generators. The project will be operational by December 31, 2030.

4.2. LDES Commercialization Project Eligibility

To apply for grant funding under the LDES Commercialization track, projects must meet the following criteria:

- The project must be **physically located in Massachusetts** and be **interconnected to the distribution system** of its applicable utility. Off-grid projects will not be considered.
- The ESS size must be 100 kW or greater.
- The energy storage technology must be non-lithium-ion batteries and non-open-loop pumped hydro.
- The project must have a 10-plus-hour duration at nameplate capacity.
- The project must have site control (selected site with permission from the owner) at the time of application.
- The equipment proposed for funded projects must meet the following minimum eligibility requirements. In cases where there is conflict between these requirements and applicable codes for the project jurisdiction, the more stringent requirement shall govern. Note that proposed equipment that lacks the required listings outlined in Table 5 may be approved at DOER's sole discretion. In these cases, the relevant components must be fully compliant prior to the start of installation work. In these

cases, the applicant should provide a brief narrative explaining the current testing/certification status and anticipated timeline.

Table 5. LDES Equipment Eligibility Requirements

Component	Required Listing	Discussion
Solar PV Modules	UL 61730	
Solar Racking	UL 2703	
Inverters, Power Conversion Systems, and Microgrid Interconnect Devices	UL 1741, UL 1741SB	Note that multimode inverters intended for islanding operation shall also be listed to UL 1741 CRD for Multimode.
Energy Storage Systems	UL 9540	Note that UL 9540 incorporates subordinate standards requirements, such as applicable testing to UL 9540A and compliance of cells and battery modules with UL 1973. Explosion control, per NFPA 68, NFPA 69, or other approved means, is included in the UL 9540 Listing. In addition, note that use of an ESS listed to UL 9540 in a manner inconsistent with its listing may initiate a requirement for Field Listing.

- In addition to the use of compliant equipment on all AMP-funded projects, by participating in the program all applicants agree to abide by all applicable codes. In particular, compliance with the Massachusetts Fire Code (527 CMR 1) is required (see energy storage requirements in Chapter 52, in particular). DOER notes that this code incorporates many of the requirements of NFPA 855 and applicants are encouraged to carefully review both the Massachusetts Fire Code and the NFPA 855 standard to ensure compliance with all applicable requirements. DOER and its technical team will review projects for code compliance prior to award of grant payments for project completion. Please note that while not required, DOER strongly recommends that projects comply with the 2026 edition of the NFPA 855 standard.

The following projects are **not eligible** for the AMP program:

- Projects that are owned or developed by one of the three investor-owned electric distribution companies (National Grid, Eversource, or Unitil)
- Projects that are part of a solar PV installation, which require the installation of energy storage as a condition for receiving SMART incentives
- Projects that intend to enroll in ConnectedSolutions
- Projects that intend to submit a bid under any of the Commonwealth's 83E energy storage procurements

- Projects submitted by communities not in compliance with the Massachusetts Bay Transportation Authority (MBTA) Communities Act as determined by the Executive Office of Housing and Livable Communities
- Single-family residential installations[6]

While projects are not required to have submitted an ISA to apply for LDES Commercialization track funding, projects that have initiated the interconnection process or can provide information on the level of review and analysis for their project may be scored more favorably (see *LDES Commercialization Evaluation Criteria)*.

Please contact customerservice@ampmass.com or (877) 238-0076 with questions about specific project eligibility prior to applying.

4.2.1. Applicant Eligibility and Teaming Arrangements

DOER's expectation is that ESS project proposals will consist of a developer and EPC firm that will design and install the ESS on behalf of a host customer. However, DOER is largely agnostic as to the business arrangement between the developer and host customer and notes that projects which are owned by the developer and for which the host customer enters into a shared savings/Power Purchase Agreement contract *are* eligible. Applicants interested in proposing projects with unconventional business relationships between the developer and host customer are encouraged to reach out with questions prior to applying.

4.2.2. Project Timing

When proposing projects, applicants should consider the stage of development that their project is in and the likelihood that the project will become operational by the end of the grant term.

4.3. LDES Commercialization Evaluation Criteria

Please note that applications that do not meet minimum eligibility requirements or are received after the application deadline may not be reviewed.

Table 6 lists the criteria DOER will review to evaluate applications for the LDES Commercialization track.

Table 6. LDES Commercialization Evaluation Criteria

Criteria Category	Category Weight	Criteria Subcategory
Overview	0%	Proposal overview
Project viability	23%	Applicant /developer relationship and experience
		Interconnection outlook

[6] Projects at multifamily residential buildings proposing to install BTM ESS associated with a common space account *are* eligible. The AMP program will not fund projects which serve individually metered, residential units.

Economic viability	27%	Cost efficiency (total proposed project cost/kWh of nameplate ESS capacity)
		Finance model/*pro forma*
		Project budget
		Project operation plan
Technical viability	17%	Technological validation
		Technology suitability
		System lifetime maintenance plan
		Safety
Benefits	33%	Community benefits
		LDES benefits
		Community engagement and partnership structure
		Innovation

Resilience

DOER will not consider *grid resiliency* benefits when evaluating applications. DOER acknowledges that there may be such benefits associated with the dispatch of energy storage systems under certain grid conditions, especially as it relates to the integration of renewables on the ISO-NE grid. DOER also acknowledges that there may be distribution or utility benefits related to the dispatch of energy storage on certain feeders or at certain times.

However, the conditions under which these benefits may accrue are largely based on future grid conditions and/or on conditions that vary significantly by location and time. It is beyond the scope of this grant initiative to evaluate the benefits associated with such value streams as they are created or enabled by an individual ESS installation.

Pollution Reduction/Health Benefits

Applicants are not required to model or quantify GHG or criteria air pollution reductions resulting from the specific dispatch strategy of a project at the time it is proposed.

As with grid resilience, the ability of an individual BTM ESS to generate verified reductions in GHG or criteria air pollution relies significantly on projections and forecasts of the grid's overall emissions mix. Where applicable, applicants are encouraged to speak about the benefits associated with the displacement of onsite combustion equipment, where relevant.

4.4. LDES Commercialization Track Application Elements

The application will consist of six elements: a project narrative, a work plan, a budget, a *pro forma*, site control, and letters of intent. Details of each follow below.

4.4.1. Project Narrative

The application will consist of a project narrative with the following sections:

- Overview

- Project viability
- Technical viability
- Economic viability
- Benefits

4.4.2. Project Work Plan

Applicants should describe the proposed development and construction timeline including key milestones, using the template provided. Project work plans should not exceed one page.

DOER will review project work plans for feasibility and reasonableness, based on the provision of the best information available at the time of application. DOER understands that elements of the project timeline, especially the interconnection process, are external to the applicant and project development team. However, the proposed project work plan should reflect the timeline that is most realistic, not simply one that is ideal. Where appropriate, applicants should describe contingency plans and build in buffer time to account for the real possibility of delays in permitting, interconnection, and construction.

4.4.3. Project Budget

Applicants should provide the project budget using the template provided. The project budget should outline all eligible project costs expected to be needed for the development and construction of the ESS system. The project budget should not include ineligible costs as DOER notes that the grant award will only be based on eligible project costs. Please refer to Appendix A for a more detailed breakdown of eligible and ineligible costs.

Eligible project costs include the following:

- All EPC cost components
- Engineering studies
- Costs associated with community outreach and education
- Costs associated with host customer project management

4.4.4. Project Pro Forma

Applicants proposing BTM LDES projects should provide project *pro forma inputs* using the template provided.

Applicants proposing FTM LDES projects should provide a custom project *Pro Forma*.

DOER expects that, to the greatest degree possible, ESS projects applying for grant funding will take advantage of existing programs and value streams available in Massachusetts. This includes Clean Peak Energy Standard and SMART, as well as demand charge management, and energy and/or capacity market participation, as appropriate. As noted in the *Funding*

Overview section, participants must pledge not to participate in ConnectedSolutions when their projects become operational.

While DOER acknowledges that not every system may be able to participate in every program or mechanism, either due to eligibility or tariff restrictions, or due to conflicting dispatch signals, applicants should list the programs and markets the ESS will participate in and should also provide a description of the ESS's dispatch strategy in their application.

4.4.5. Site Control

Applicants should provide proof of site control using the template provided or equivalent documentation.

4.4.6. Letters of Intent and Support

Applicants must provide at least one signed letter of intent documenting the existence of a business relationship between the host customer and the ESS installer or developer. Other project partners may provide formal letters of intent, but these are not required. Additionally, any letters of support from community members or organizations may also be appended; these are also not required.

4.5. LDES Commercialization Track Participation Requirements

Awarded projects must adhere to the following terms during and after the grant period:

- Participation in Clean Peak Energy Standard (if eligible)
- Achievement of COD by December 31, 2030
- Annual reporting[7] for three years once the project is operational, including the following components:
  - Submittal of operational data on system performance to DOER for three years from the date of COD, including a minimum granularity of 15-minute interval data on battery charge/discharge capacity and any parasitic loads while the system is idle.[8]
  - Narrative on qualitative project performance (e.g., services project is providing to the community, experience during outages, communication/outreach to the community, etc.)
- As part of the proposed project costs, awardees must include a long-term service agreement with the ESS OEM, with a minimum duration of five years, which ensures that the system is operational.

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[7] A total of $30,000 will be reserved from each LDES grant award for post-COD annual reporting and will be disbursed in $10,000 increments upon receipt of each annual report.

[8] Performance metrics for non-inverter-based technologies determined on a case-by-case basis.

- Community engagement and safety plans
- Quarterly progress reporting during grant term - awarded projects will submit a brief, narrative report to DOER that provides updates on project status and progress, including the following, as appropriate:
  - Engineering and design
  - Permitting and community engagement
  - Procurement and finance
  - Construction
  - Commissioning
- Material changes to scope and budget—if the applicant proposes a substantive change to the scope of the project (i.e., ESS capacity, duration, or technology) or expects project costs to differ from more than 10% from those submitted in the most recent budget document, the applicant must submit a new budget outlining the new cost estimates
  - If a grantee proposes substantive changes to their originally proposed project or experiences significant increases or decreases in project costs, DOER must review proposed changes to scope and budget and may, at its discretion, amend or cancel grant agreements. While DOER will make every effort to work with grantees to navigate changes to project scope and budget, DOER must also ensure that grant funding is spent on projects that are likely to be constructed and become operational. In the event that costs increase, DOER may be unable to commit to increases in grant funding.
- Grant funding provided on a milestone-based disbursement schedule:
  - Execution of the award agreement and provision of project plans and documentation of initiation of the interconnection process
    - 5% of the grant award, not to exceed $100,000
  - Execution of ISA with EDC/Notice to Proceed with construction
    - 40% of grant award
  - Major equipment delivery
    - 40% of grant award
  - Final completion (utility PTO documentation)
    - 15% of grant award

5. Safety and Education Track

5.1. Safety and Education Track Overview

5.1.1. Track Objective

To support the safe deployment of ESS by equipping Authorities Having Jurisdiction, regional planning boards, and emergency response departments with knowledge, tools, and best practices around the reasonable risks and emergency response protocols for ESS.

5.1.2. Track Offering

- Grant of up to 80% of total program cost (not to exceed $800k)

5.1.3. Track Example Project

A regional planning agency that serves EJ communities seeks funding to develop and host an ESS-specific safety training for fire responders to ensure they have the latest knowledge on how best to respond to emergencies at sites with ESS.

5.2. Safety and Education Project Eligibility

To apply for grant funding under the Safety and Education track, projects must meet one of the following three sets of criteria:

- Applicants may propose the development and delivery of training programs, workshops, and/or the facilitation of working groups to educate, engage, and collaborate with officials and community members on specific issues related to ESS development, siting and permitting, and safety.
- Applicants may propose to enroll staff or officials in existing training programs.
- Applicants may propose to purchase safety equipment related to ESS deployment.

In cases where applicants propose to develop and deliver or enroll staff in programs, proposals should follow these guidelines:

- Address a *technical* education need in the Commonwealth of Massachusetts and be oriented toward officials and/or residents of Massachusetts communities.
- Demonstrate impacts beyond a specific proposed ESS project; preference for broad impacts (community, regional, or statewide) over time.
- Clearly articulate the intended audience to participate in these training or engagement programs, their roles, and how their communities, and/or the broader Commonwealth will benefit from the proposed program.
- Use industry-leading experts to develop and deliver data-driven education or training programs.

Please note that DOER is *not* seeking proposals that constitute advocacy or are intended to promote general awareness of energy storage technologies.

Applications submitted by communities not in compliance with the Massachusetts Bay Transportation Authority (MBTA) Communities Act as determined by the Executive Office of Housing and Livable Communities are *not* eligible for grant funding.

Please contact customerservice@ampmass.com or (877) 238-0076 with questions about specific project eligibility prior to applying.

5.3. Safety and Education Evaluation Criteria

Please note that applications that do not meet minimum eligibility requirements or are received after the application deadline may not be reviewed.

Table 7 lists the criteria DOER will review to evaluate applications for the Safety and Education track:

Table 7. Safety and Education Evaluation Criteria

Criteria Category	Category Weight	Criteria Subcategory	Applicable Proposal Types
Overview	52%	Proposal overview	All proposal types
		Alignment with program objectives	All proposal types
		Explanation of Barriers	Tuition reimbursement and equipment purchase
Benefits	48%	Community benefits	Development and delivery of programs
		Community engagement and partnership structure	Development and delivery of programs
		Impact	Development and delivery of programs

5.4. Safety and Education Track Application Elements

The application will consist of a project narrative and optional letters of intent and support. Applications proposing to develop and deliver programs or enroll staff in existing programs will also include a work plan and budget. Details on each follow below.

5.4.1. Project Narrative

The application will consist of a project narrative with the following sections:

- Overview
- Benefits

5.4.2. Project Work Plan

Applicants proposing to develop and deliver programs or enroll staff in existing programs should describe the proposed timeline including key milestones, using the template provided. Project work plans should not exceed one page.

DOER will review project work plans for feasibility and reasonableness, based on the provision of the best information available at the time of application. DOER understands that elements of the proposal timeline are external to the applicant and proposal development team. However, the proposed work plan should reflect the timeline that is most realistic, not simply one that is ideal.

5.4.3. Project Budget

Applicants proposing to develop and deliver programs or enroll staff in existing programs should provide the project budget using the template provided. The project budget should outline all eligible project costs expected to be needed for the development and execution of the proposed submission. The project budget should not include ineligible costs as DOER notes that the grant award will only be based on eligible project costs.

Eligible project costs include the following:

- Costs associated with community outreach and education
- Costs associated with host customer project management
- Reasonable travel expenses associated with proposals to enroll staff or officials in existing training programs.[9]

Ineligible project costs include the following:

- Costs associated with political activities or advocacy, including lobbying

5.4.4. Letters of Intent and Support

Applicants may provide formal letters of intent or support from project partners or community members/organizations, but these are not required.

5.5. Safety and Education Track Participation Requirements

- Scheduled reporting to DOER on what grant is being used for and key performance indicators, such as the number of first responders trained, events hosted, attendees, and materials produced.

- Material changes to scope and budget—if the applicant proposes a substantive change to the scope of the project or expects project costs to differ from more than 10% from those submitted in the most recent budget document, the applicant must submit a new budget outlining the new cost estimates.

[9] Preference will be given to proposals without extensive travel or costs outside of training enrollment.

- If a grantee proposes substantive changes to their originally proposed project or experiences significant increases or decreases in project costs, DOER must review proposed changes to scope and budget and may, at its discretion, amend or cancel grant agreements. While DOER will make every effort to work with grantees to navigate changes to project scope and budget, DOER must also ensure that grant funding is spent on projects that are likely to come to fruition. In the event that costs increase, DOER may be unable to commit to increases in grant funding.

6. Application Timeline and Process

6.1. AMP Timeline

Table 8 lists the primary milestones of the AMP program:

Table 8. AMP Program Timeline

Date(s)	Milestone Description	Applicable Track
December 2, 2025	Program becomes "live" and application period opens.	All tracks
January 23, 2026	Requests for CR Path 2 "preconstruction support" are due. Indication of an "intent to bid" for all applicants requested.	CR Path 2
February 20, 2026	CR Path 2 "Preconstruction support" awards announced.	CR Path 2
March 13, 2026	Phase 1 project funding applications due.	CR Path 1, LDES Commercialization, Safety and Education
June 22, 2026	Preconstruction feasibility studies finalized.	CR Path 2
June 26, 2026	CR Path 1, LDES Commercialization and Safety and Education project funding awards announced.	CR Path 1, LDES Commercialization, Safety and Education
August 21, 2026	CR Path 2 Project funding applications for entities receiving preconstruction support due.	CR Path 2
October 30, 2026	CR Path 2 Project funding awards for entities that received preconstruction support announced.	CR Path 2
June 2026 - December 2030	Project development and construction: Ongoing project team engagement, quarterly progress reporting to DOER, milestone payments as achieved.	All tracks

6.2. Application Process

Please refer to the AMP program website for guidance on the application process.

7. General AMP Energy Storage Grant Program Conditions

7.1. Notice of Public Disclosure

As a public entity, DOER is subject to Massachusetts' Public Records Law, codified at Chapter 66 of the Massachusetts General Laws. Thus, except for those documents exempted from disclosure under state law, any documentary material, data, or other information received by DOER from an applicant is a public record subject to disclosure. Materials that fall under certain categories, however, may be exempt from public disclosure under a statutory or common law exemption, including the limited exemption at Chapter 23J, Section 2(k) of the Massachusetts General Laws regarding confidential information submitted to DOER by an applicant for any form of assistance. Specifically, materials that fall under one of the following categories may be determined to be not public records and thus not subject to disclosure:

- Information, documents, or data that consist of trade secrets
- Information, documents, or data that consist of commercial or financial information regarding the operation of any business conducted by the applicant
- Information, documents, or data regarding the applicant's competitive position in a particular field of endeavor

7.2. Waiver Authority

DOER reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to request modifications of the application, to accept or reject any or all applications received, and/or to cancel all or part of the AMP program at any time prior to awards.

7.3. Disclaimer

The AMP program manual does not commit DOER to award any funds, pay any costs incurred in preparing an application, or procure or contract for services or supplies. DOER reserves the right to accept or reject any or all applications received, negotiate with all qualified system owners, cancel or modify the program manual in part or in its entirety, or change the application guidelines, when it is in its best interests.

7.4. Changes or Amendments to the Program Manual

This program manual has been distributed electronically using DOER's website. It is the responsibility of system owners and primary installers or integrators to check DOER's website for any addenda or modifications to the program manual to which they intend to respond. DOER, the Commonwealth of Massachusetts, and its subdivisions accept no liability and will provide no accommodation to system owners and primary installers or integrators who apply based on an out-of-date program manual or related document.

7.5. Inspection

DOER reserves the right to inspect project sites and/or request additional technical information prior to approving or denying applications.

8. Appendix A: Cost Breakdown

The following lists present a breakdown of allowable and unallowable costs for Community Resilience Path 1 and LDES Commercialization track applications. DOER notes that unallowable costs *may* be included as part of the overall project scope, but they will *not* be considered as part of the basis for determining the grant amount. DOER encourages applicants to reach out regarding the eligibility of proposed costs *prior* to the submission of grant applications.

8.1. Allowable Costs

- **EPC costs**
  - ESS (including DC converter and inverter)
    - DC block
    - DC-DC converter
    - Inverter
    - BMS+EMS
    - Freight/shipping
    - Commissioning
    - Extended warranty
    - Tariff
  - Transformers
  - BOS (combiners, switchgear, AC panelboards, AUX equipment)
  - DAS/SCADA/metering
  - Site work (civil work, equipment pad, fencing)
  - Site work labor
  - Electrical labor
  - Engineering, permitting, and inspection
  - Utility upgrades
  - Contingency
  - EPC overhead & profit
- **Development costs**
  - Legal fees (related to business transactions, i.e. execution of contracts)
  - Engineering studies
  - Decommissioning bond
- **Operating expenses** (paid up front as part of service contract)
  - Operations and maintenance contract
  - Long-term services agreement with OEM (minimum of 5 years)

    - Telecommunication and data acquisition
- **Retrofit or solar and storage costs included in project cost**
    - Upgrades to building service and main building switchgear
    - Upgrades to DAS/controls system
    - Cost difference between hybrid solar and storage inverter and solar only inverter

8.2. Unallowable Costs

- Generation equipment, including solar PV system costs.
- System augmentation post-operation
- Costs associated with market/program participation
- Energy costs
- Land purchase/lease

9. Appendix B: Community Resilience Equity Cost Share

Community Resilience projects located in or serving Environmental Justice (EJ) populations, as defined by the Massachusetts Executive Office of Energy and Environmental Affairs (EEA),[10] are eligible for a grant award up to 90% of total project cost.

The Massachusetts EEA defines an EJ population as a neighborhood in which one or more of the following criteria are true:

- Annual median household income is 65% or less of the statewide annual median household income.
- Minorities make up 40% or more of the population.
- 25% or more of households identify as speaking English less than "very well."
- Minorities make up 25% or more of the population, and the annual median household income of the municipality in which the neighborhood is located does not exceed 150% of the statewide annual median household income.

A project in a location that is not designated as an EJ population by the Massachusetts EEA may apply for a grant award up to 90% of total project cost if it can demonstrate that the project's facility serves an EJ population. DOER will review applications of this nature on a case-by-case basis.

Projects in EJ-designated communities and those that demonstrate they serve EJ-designated communities, regardless of the number of criteria that apply to the community, are eligible to receive a grant award of up to 90% of total project cost.

[10] Mass.gov. Accessed November 2025. "Environmental Justice Populations in Massachusetts." https://www.mass.gov/info-details/environmental-justice-populations-in-massachusetts#environmental-justice-maps-update-2022

10. Appendix C: Program Manual Change Log

The following table presents a record of changes made to the AMP program manual since its initial posting on December 2, 2025:

Table 9: Program Manual Change Log

Date	Program Manual Section	Change(s) Made
December 5, 2025	7.5. Inspection	Removed sentence referencing nonexistent attachment
December 9, 2025	3.2.3. Path 1 Evaluation Criteria	Added criteria scoring weight by category to evaluation criteria tables
	3.3.3. Path 2 Evaluation Criteria	
	4.3. LDES Commercialization Evaluation Criteria	
	5.3. Safety and Education Evaluation Criteria	
December 12, 2025	3.2.3. Path 1 Evaluation Criteria	Added description of 'Cost Efficiency' to evaluation criteria tables
	4.3. LDES Commercialization Evaluation Criteria	