The Commonwealth of Massachusetts

DEPARTMENT OF PUBLIC UTILITIES

MEMORANDUM

TO: D.P.U. 26-62 Distribution List

FROM: Elizabeth McNamara, Hearing Officer

RE: October Technical Conference Agenda

DATE: October 6, 2026

CC: Peter Ray, Department Secretary

I. INTRODUCTION

On April 8, 2026, the Massachusetts Department of Energy Resources ("DOER") filed a petition with the Department of Public Utilities ("Department") for the Department to open an inquiry into time-varying rates ("TVR"). On June 30, 2026, the Department voted to open an investigation concerning the design and implementation of TVR. D.P.U. 26-62, Vote and Order Opening Inquiry at 13-14 (June 30, 2026). This inquiry will examine rate design considerations for the TVR framework that the Department approved in 2014. Time Varying Rates, D.P.U. 14-04-B at 8-12 (2014); D.P.U. 14-04-C at 2. In addition, the Department will examine the merits of incorporating transmission and distribution costs into the TVR framework; customer protections for vulnerable populations; the electric distribution companies' ("EDCs" or "Companies") plans for the implementation of TVR; and marketing, education, and outreach ("MEO") plans for the transition to TVR. The Department's investigation was docketed as D.P.U. 26-62.

Previously, the Department notified stakeholders of a technical conference to be held in this matter on October 21 and October 22, 2026. D.P.U. 26-62, Hearing Officer Memorandum (September 3, 2026). The Department also indicated that the data and comments filed in this investigation, including stakeholders' input provided at the technical conference and responses to the Department's information requests, will inform a straw proposal. D.P.U. 26-62, Hearing Officer Memorandum (September 25, 2026). This memorandum provides logistical information and sets forth an agenda for the technical conference.

II. LOGISTICS

The Department will hold a technical conference for this investigation starting at 10:00 a.m. on **Wednesday, October 21, 2026**. The technical conference will adjourn at about 5:00 p.m. on October 21 and continue at 10:00 a.m. on **Thursday, October 22, 2026.** There will be mid-morning and mid-afternoon breaks of about 15 minutes, as needed, as well as a midday break for lunch.

To facilitate an active conversation, the Department encourages stakeholders to attend the technical conference in-person, if possible. Stakeholders that cannot be at the technical conference in-person will be able to participate virtually. Please note, discussions will begin with comments from in-person attendees and then move to virtual attendees, if time allows. For in-person attendees, the technical conference will be held at the Department's offices, 1 South Station, 3rd floor, Boston, Massachusetts 02110.

To actively participate, both in-person and virtually, you **must** register via the following Microsoft Forms link no later than **October 16, 2026**: https://forms.cloud.microsoft/g/zTHAk2SbeK. You will have the option to attend in-person or virtually. Please select your preferred option. Prior to beginning your comments every time you speak, please state your full name and affiliation. If you register to attend virtually, you will receive a panelist Zoom link near the date of the technical conference; if attending virtually, please update your Zoom profile in advance with your name and organization. We also ask that you turn your camera on while speaking.

Individuals who wish to only observe the technical conference should not register at the link above. Please observe by following the Zoom link (https://us06web.zoom.us/j/83897378488) from a computer, smartphone, or tablet. No prior software download is required. For audio-only access to the hearing, attendees can dial in at 1 309 205 3325 (not toll free) and then enter the Webinar ID number: 838 9737 8488. Individuals who do not register via the Microsoft Forms link included above will not be permitted to provide comments at the technical conference. If you experience any technical difficulties during the technical conference, please contact: kaylee.burgess@mass.gov and elizabeth.c.mcnamara@mass.gov.

III. OBJECTIVES

In this proceeding, the Department aims to expeditiously explore and implement TVRs, leveraging the considerable work completed by the Department, DOER, the EDCs, and stakeholders on this topic over the past 14 years. In this investigation, the Department seeks to answer the questions whose resolution will benefit from statewide consistency and collaboration across the EDCs and stakeholders. Prudent exploration and implementation of TVRs will require careful consideration of the appropriate level of complexity of any TVR design, how complexity may be added over time to improve customer and grid outcomes, and what customer protections and education are necessary and appropriate. This technical conference will aid this proceeding by gathering information and perspectives from stakeholders. Department staff

intend to use the information gathered in the technical conference and the record to develop a straw TVR proposal in the coming months.

IV. AGENDA

In setting the agenda for this technical conference, the Department considered several important factors, including the scope of this investigation, as set forth in the Vote and Order Opening Inquiry, and the Department's obligation to conduct all of its proceedings in an efficient and orderly manner.

To assist the Department with this significant undertaking and ensure the resolution of these important questions in a timely manner, the Department has engaged the Regulatory Assistance Project ("RAP") to provide technical assistance. RAP will assist the Department with facilitating the technical conference. RAP and the Department will hold the technical conference over two days, with October 21 focusing on TVR design elements and October 22 focusing on TVR implementation, including the necessary changes to EDC systems and customer protection measures.

Facilitated discussion on TVR technical design elements and TVR implementation will be held both days. Both in-person and virtual participants will have the ability to participate in the facilitated discussions. Discussion questions are included in the agenda below. **All stakeholders are encouraged to review the discussion questions in advance of the technical conference and to come prepared to provide responsive comments.** The Department respectfully requests that stakeholders, including DOER, the EDCs, and the Attorney General, come prepared to answer the discussion questions, as well as to provide insight into the technical analyses pertaining to rate design elements. The technical conference facilitator may, in their discretion, move to the next commentor if a participant's comments are not responsive to the topic or the discussion question, or if time requires.

If desired, stakeholders may request to provide a presentation on any of the facilitated discussion questions. Such presentation must be 10 minutes or shorter and would be provided during the appropriate time on the agenda (e.g., a prepared presentation on peak ratios would be provided during that portion of the agenda). Stakeholders interested in providing a prepared presentation(s) on any of the discussion questions should contact elizabeth.c.mcnamara@mass.gov by **October 16, 2026**. The Department may deny a request to provide a presentation at its discretion to ensure efficient and equitable use of time and speaking opportunities for stakeholders.

The Department respectfully requests that DOER provide a presentation to start the technical conference. Specifically, the Department invites DOER to present on the recommendation and analysis included in its petition filed on April 8, 2026, including its recommendations on TVR structure and rate design, customer protections, opt-out TVRs, and the benefits of TVR. The Department also requests that DOER include in its presentation supplemental information, recommendations, and analysis of:

- the potential benefits of TVR, including analysis conducted by DOER, the Massachusetts EDCs, or state agencies or EDCs in other jurisdictions;
- realized benefits of TVR, leveraging quantitative and qualitative analysis from other jurisdictions; and,
- the potential benefits of opt-out TVRs versus opt-in TVRs and any additional information, analysis, or insights related to DOER's recommendation for an opt-out TVR including, but not limited to, the success and benefits of opt-out TVRs in other jurisdictions.

Following the technical conference, stakeholders may submit to the Department copies of written presentation materials, comments, or other information within the scope of this agenda. These materials must be non-duplicative, responsive to this agenda's discussion topics and questions, and submitted no later than the close of business (5:00 p.m.) on **Thursday, November 5, 2026**. All documents must be submitted to the Department in .pdf format by e-mail attachment to dpu.efiling@mass.gov and elizabeth.c.mcnamara@mass.gov. The text of the e-mail must specify: (1) the docket number of the proceeding (D.P.U. 26-62); (2) the name of the person or company submitting the filing; and (3) a brief descriptive title of the document. All documents submitted in electronic format will be posted on the Department's website through our online File Room as soon as practicable (enter "26-62") at: https://eeaonline.eea.state.ma.us/DPU/Fileroom/dockets/bynumber. Please note that, in the interest of transparency, any comments will be posted to our website as received and without redacting personal information such as addresses, telephone numbers, or email addresses. Therefore, consider the extent of information you wish to share when submitting comments. The Department strongly encourages public comments to be submitted by email using the methods described above. If, however, a member of the public is unable to send written comments by email, a paper copy may be sent to Peter Ray, Secretary, Department of Public Utilities, One South Station, Boston, Massachusetts, 02110.

As discussed above, the Department sets forth the following agenda and discussion questions for the technical conference:

A. Wednesday, October 21, 2026

1. Welcoming Remarks, Introductions, and Guidelines for Participation

2. DOER Presentation on TVR[1]

Topics: Overview of recommendations in DOER's petition, including TVR structure, and customer protections, as well as additional discussion and analysis of the overall benefits TVRs and the specific benefits of an opt-out TVR versus an opt-in TVR

3. Facilitated Discussion on TVR Design Elements[2]

a. Time Periods

Discussion Questions:

- *Around what should the peak period be designed: ISO-NE bulk system peak, load zone peaks, transmission system peaks, or distribution system peaks? To the extent that the timing of each peak differs, how should those differences be incorporated into the design of the peak period(s)?*

- *Is 4 hours the right duration for the peak period? What are the tradeoffs between a shorter vs. longer peak period?*

- *What are the advantages or disadvantages of establishing more peak periods (e.g., a three-period design with on-peak, off-peak, and super-off-peak windows) that should be considered?*

- *Should weekends and holidays have different peak periods than weekdays?*

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[1] To ensure sufficient time for Q&A, DOER should plan their presentation to take approximately 45 minutes or less. The Department will allow for 30 minutes of Q&A after the presentation, starting with Department staff and Commissioners, RAP, and in-person participants, then moving to virtual participants.

[2] RAP will provide an overview of each TVR design element and present the discussion questions prior to inviting stakeholders to respond. RAP will invite DOER, the EDCs, and the AGO to provide comment, in turn, before turning to other in-person participants and then moving to virtual participants. RAP may limit the time for comment, if needed, to ensure that all discussion topics are covered.

b. Peak Ratios

Discussion Questions:

- *For each of the following TOU components, together and separately, what is the best price ratio (i.e., ratio between peak vs. off-peak prices) to incentivize customers to shift their demand, while not creating undue volatility, assuming a two-period TOU:*

  Basic service supply rates

  Transmission rates

  Base distribution rates

- *Should TOU be extended to reconciling mechanism charges (i.e., net metering renewable surcharge, energy efficiency reconciling factor, etc.) to bolster a price signal?*

- *Should the EDCs design their TOU rates using a consistent, statewide price ratio(s), or should each EDC set its own unique ratios? If the latter, what principles should guide the EDCs in setting the peak ratios?*

- *What are the tradeoffs between a shorter peak period with a stronger price ratio vs. a longer peak period with a weaker price ratio?*

- *Should the default TOU rate start with a mild price ratio before transitioning to a stronger, more cost-reflective ratio?*

- *What price ratio best practices or lessons are learned from other utilities and jurisdictions?*

c. Seasonality

Discussion Questions:

- *How should seasons be defined (e.g., two or three seasons)? Which rate components should have seasonal differentiation? What is the appropriate seasonal differentiation?*

d. Critical Peak Pricing ("CPP") for Basic Service

Discussion Questions:

- *Should the EDCs offer an opt-in TOU that is more dynamic than the opt-out TOU? Why or why not?*

- *Should a basic service CPP be coordinated with existing demand response offerings (e.g., ConnectedSolutions), and if so, how?*

- *What best practices or lessons are learned from other utilities and jurisdictions?*

4. Rate Design for Opt-Out Customers

Discussion Questions:

- *Should the EDCs maintain a flat, non-seasonal rate option consistent with current rates or some other rate design option(s) for customers who wish to opt-out?*

- *What technical aspects need to be considered in developing a basic opt-out option?*

- *Should participation in ConnectedSolutions or a similar offering be required of opt-out customers?*

B. Thursday, October 22, 2026

1. Welcoming Remarks, Introductions, and Guidelines for Participation

2. (As Needed) Continued Facilitated Discussion on TVR Design Elements

3. EDC Presentation on Implementation Timelines[3]

Topics: changes needed to the EDCs' IT and billing systems and standard service procurements to implement TVR; and associated implementation timelines

Please be as specific as possible and address the following scenario(s):

- Fastest implementable option: Describe the TVR design that could be implemented in the shortest timeframe, including the principal design elements and the estimated implementation timeline. This option should include TVR design elements that can be implemented as advanced meters are installed, but ahead of full advanced meter deployment.

- Design-element impacts: Identify individual rate-design elements or choices, including but not limited to those design elements specified in the Agenda for Day 1 of the technical conference, that would materially affect implementation timing. For each, indicate whether it would have little/no impact, a moderate impact, or a

[3] To ensure sufficient time for Q&A, the EDCs should plan for each of their presentations to take approximately 25 minutes or less. The Department will allow for 10 minutes of Q&A after each presentation, starting with Department staff and Commissioners, RAP, and in-person participants, then moving to virtual participants.

significant impact on implementation timing, and quantify the additional time where possible.

- Earliest availability: For each rate-design element, provide the earliest date or estimated number of months after approval by which the rate could be made available to customers with advanced meters.

4. Facilitated Discussion on Implementation[4]

a. Customer Information Needs

Discussion Questions:

- *What data, and/or tools will customers need to both adopt (upfront) and respond (ongoing) to TVR?*

- *What are the most effective ways for such data, and tools to be provided to customers? What systems will be required to deliver the necessary data, and/or tools?*

b. Consumer Protections

Discussion Questions:

- *Under an opt-out model, are there specific customer groups or characteristics/conditions that may warrant being exempted from the opt-out provision (i.e., TOU available on an opt-in basis for income eligible or medical hardship customers)?*

- *How should customers learn about what TVR is likely to mean for their utility bill and how to change their rate if needed? How personalized does this education need to be? Are generic resources (e.g., FAQs, trained customer service representatives) appropriate or is analysis of the likely impact for each customer necessary (e.g., shadow billing, customer-specific calculator tools)?*

- *Who should communicate what TVR will mean for customers? The EDCs? DOER, other state entities, Community Action Agencies, or other specific stakeholders?*

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[4] RAP will present the discussion questions prior to inviting stakeholders to respond. RAP will invite DOER, the EDCs, and the AGO to provide comment, in turn, before turning to other in person participants and then moving to virtual participants. RAP may limit the time for comment if needed to ensure that all discussion topics are covered.

- *Do heat pump customers require different protections relative to other customers? How are the EDCs currently communicating the interim nature of the heat pump rates to customers?*

5. Tracking & Evaluating Outcomes

Discussion Questions:

- *What information needs to be tracked to measure the benefits and any other impacts of TVR, and to inform potential TVR design changes?*

- *What entities need to collect this information? Who should be responsible for reporting this data to the Department?*

- *How and when should such data be evaluated?*