MASSACHUSETTS
DEPARTMENT OF ENERGY RESOURCES

Massachusetts Electric Rate Task Force

Kick-Off Meeting – April 30, 2025
3:00-5:00pm

The contents of this presentation do not necessarily reflect the views or positions of the Massachusetts Department of Energy Resources.

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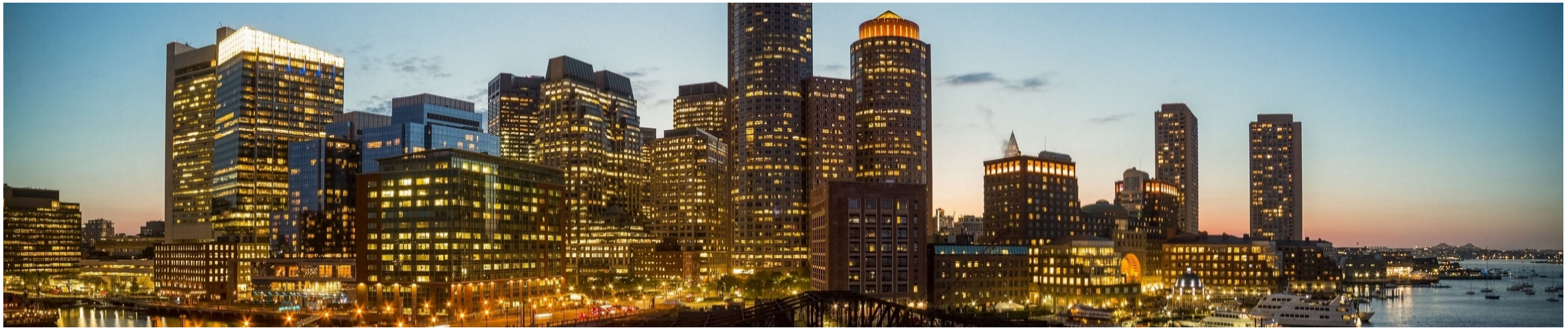
Our Mission

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

To achieve our mission, DOER connects and collaborates with energy stakeholders to develop effective policy

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, reducing and shaping energy demand, and improving our energy system infrastructure.

DOER is dedicated to advancing clean, resilient, and accessible energy solutions across the state. It aims to provide a sustainable energy landscape that prioritizes environmental responsibility while promoting economic growth and social equity.



Agenda

i. Commissioner's Opening Remarks (5 minutes)

ii. Welcome & Introductions (25 minutes)

iii. Strategy & Workplan (30 minutes)

iv. Phase I Key Topics (50 minutes)

v. Next Steps and Closing (10 minutes)

Welcome & Introductions

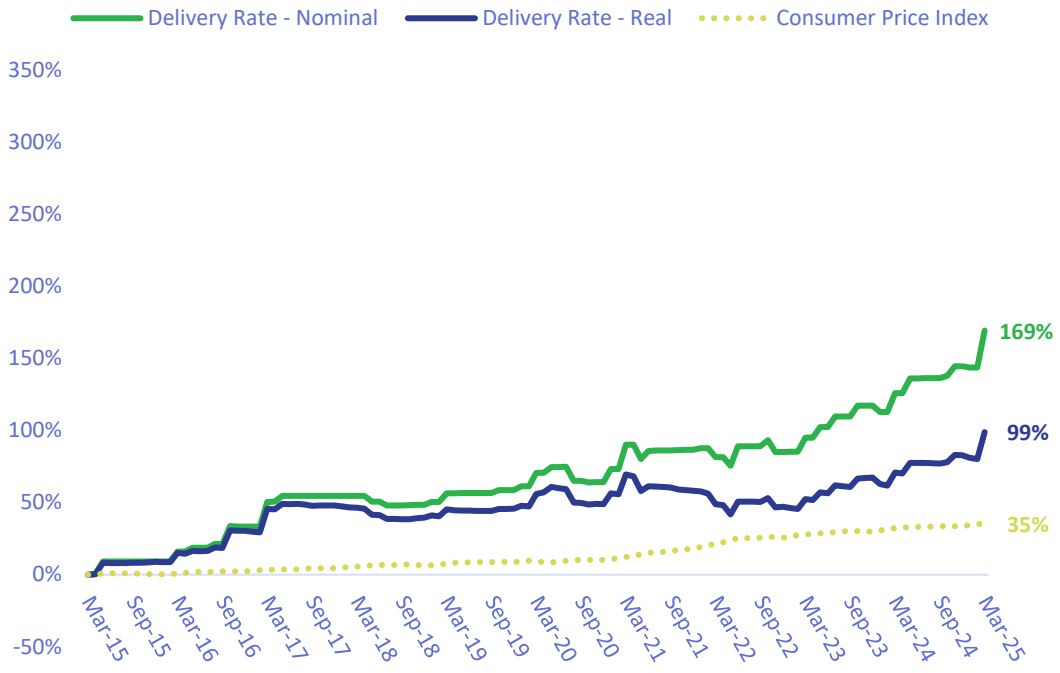
25 min

Electricity rates - delivery and supply - have outpaced inflation

Consumers are experiencing larger electric bills and increasing energy burdens

Residential Electric Delivery Rate and Inflation

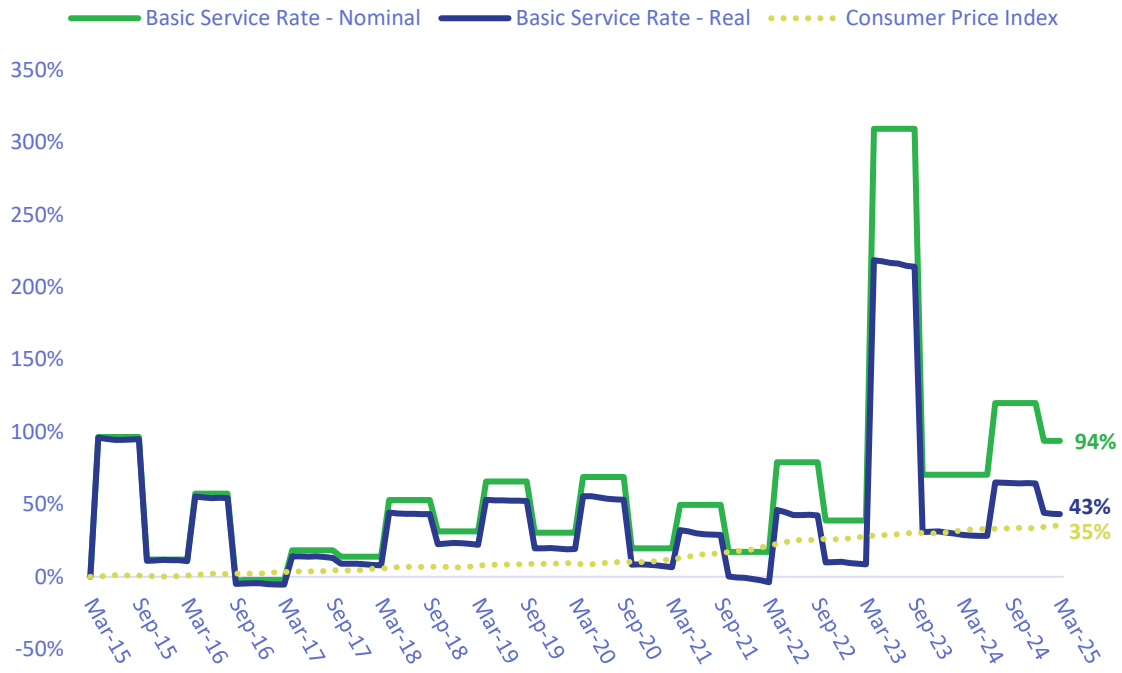
% Change, Relative to March 2015



Source: National Grid Delivery Rates

Residential Electric Supply Rate and Inflation

% Change, Relative to March 2015



Source: National Grid Basic Service Rates

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Ratemaking must balance three key pillars of decarbonization

End Use Energy

Transitioning buildings, vehicles, and other end uses away from consuming fossil fuels

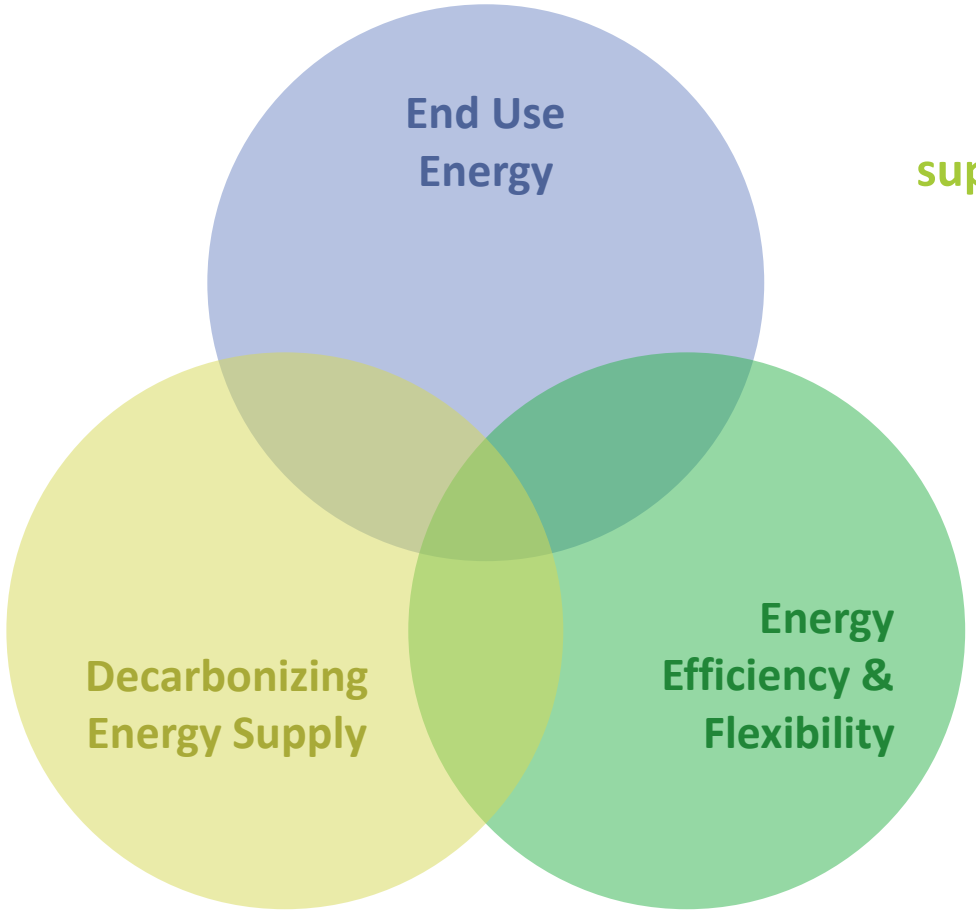
Energy Efficiency & Flexibility

Pursuing energy efficiency and flexibility to enable cost-effective decarbonization

Decarbonizing Energy Supply

Producing zero and low-carbon energy supplies to power our energy system

Adapted from Clean Energy and Climate Plan for 2025 and 2030



To achieve net zero, electric rates and ratemaking must support each of these pillars in a balanced manner

Advanced metering infrastructure (AMI) enables sending customers more accurate price signals and supporting greater flexibility

Modernized ratemaking and regulatory mechanisms are needed to support an affordable transition to a decarbonized energy future

Massachusetts Electric Rate Task Force

Mission Statement

The Massachusetts Electric Rate Task Force brings together diverse stakeholders to reimagine how electric rates and the regulatory framework can drive an affordable, equitable, and decarbonized energy future.

Through targeted conversations, expert presentations, and thoughtful exploration of complex issues, the Task Force aims to deepen understanding, surface critical questions, clarify challenges, and build the foundation for durable regulatory reform and action.

Purpose

To facilitate informed and forward-looking dialogue on electric rate design and regulatory mechanisms that advance Massachusetts' decarbonization and affordability goals.

Objective

To build shared understanding of key issues, surface priority and outstanding questions, and prepare a strong foundation for a Department of Public Utilities (DPU) investigation into electric rates and the regulatory framework.

Rate Task Force Goals

The Rate Task Force will use the Massachusetts Interagency Rates Working Group's Long-Term Ratemaking Study and Recommendations as a starting point for discussion and knowledge building on rate designs, ratemaking, and regulatory mechanisms.

Build technical knowledge

Provide an opportunity for **knowledge-building** by and amongst stakeholders, including those who have not traditionally been involved

Facilitate open, inclusive dialogue

Engage in **open, inclusive dialogue** about complex ratemaking and regulatory issues outside of a regulatory proceeding

Develop shared understanding

Converge towards **shared understandings** of the challenges and priorities

Frame critical questions and opportunities

Empower stakeholders to identify **critical questions and opportunities** for the advancement of rate design and ratemaking reform

Rate Task Force Participants

- Eversource
- National Grid
- Unitil
- Massachusetts Attorney General's Office
- Massachusetts Clean Energy Center
- Executive Office of Energy and Environmental Affairs
- Acadia Center
- Conservation Law Foundation
- Sierra Club
- Low-Income Affordability Network
- Environmental Defense Fund
- Environmental League of Massachusetts
- Green Energy Consumers Alliance
- Planning Office of Urban Affairs
- Vote Solar
- Rewiring America
- Advanced Energy United
- Alliance for Climate Transition
- GoodLeap
- Action for Boston Community Development
- National Consumer Law Center
- Self Help Inc.
- Sunrun
- Trinity Solar
- IGS Energy
- PosiGen
- NineDot Energy
- Solar Energy Industries Association
- American Council for an Energy Efficient Economy
- Stephens and Company/Northeast Home Energy Raters Alliance
- Northeast Energy Efficiency Partnership
- Good Energy
- Massachusetts Institute of Technology
- GridX
- Stack Energy Consulting
- PowerOptions
- Regulatory Assistance Project
- RMI
- Foley Hoag
- Oracle
- Cape Light Compact
- LG Electronics
- ISO-NE
- Department of Public Utilities
- Darja Mihailova
- Ahmad Faruqui
- Raymond Albrecht
- Ray D. Williams
- Brett Feldman

Ground Rules & Engagement

This work is complex – and your insight matters; let's focus on learning, listening, and shaping together!

Participation, Engagement, & Respect

- Everyone's perspective is valuable – this space works best when all voices are heard
- Respect differences in background, experience, and priorities
- Bring curiosity – ask questions and offer potential answers
- Focus on understanding others' goals and values, not just their positions
- It's okay not to have a solution – help us shape the right questions

Collaboration, Not Consensus

- This body is deliberative, it is not a decision-making space
- We don't need to agree on everything, but we should work toward shared understanding
- Where we disagree, help clarify what the tension is and why it matters

Transparency & Trust

- We'll be clear about how input is used
- Share what you can; identify when you're speaking on behalf of your organization or personally
- Materials, summaries, and key findings will be shared openly to support accountability

Focus & Productivity

- Stay on topic and honor the scope of the Task Force
- Raise related concerns, but help us stay anchored in the rate design and regulatory issues at hand
- Use the structures provided (i.e., expert sessions, targeted conversations, office hours) to deepen discussion
- Avoid discussion about open and ongoing proceedings at the DPU

What have we missed? Any additional ground rules that participants feel are important to outline at the outset of the Task Force?

Strategy and Workplan

30 min

Why we are here?

Interagency Rates Working Group (IRWG)

- IRWG was formed to advance near- and long-term electric rate design and ratemaking that align with the Commonwealth's decarbonization goals; included representatives from the Executive Office of Energy & Environmental Affairs (EEA), the Massachusetts Clean Energy Center (MassCEC), the Department of Energy Resources (DOER), and the Attorney General's Office (AGO)
- IRWG's **Long-Term Ratemaking Recommendations** (March 2025) identify rate designs and examine regulatory mechanisms to support decarbonization and promote affordability in Massachusetts

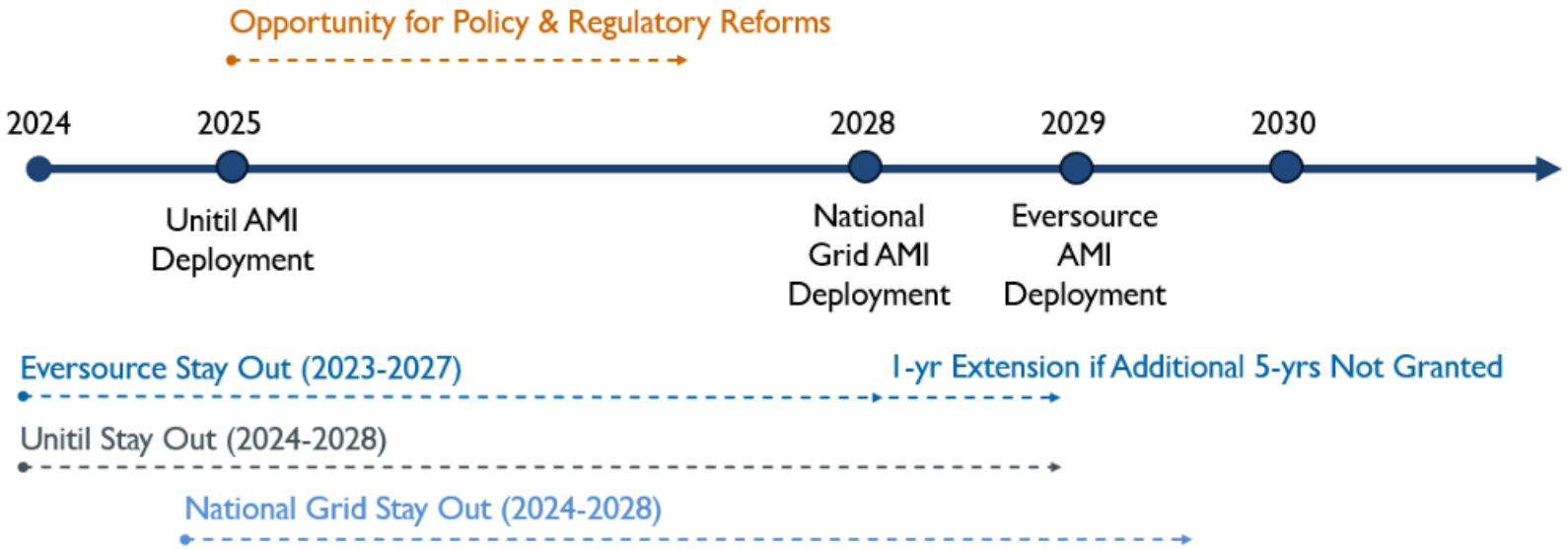
Massachusetts Electric Rate Task Force

- IRWG identified that further stakeholder deliberation prior to a DPU investigation would better support the necessary advancement of electric rate design and a comprehensive regulatory framework to cost-effectively support the Commonwealth's clean energy and climate goals
- The DPU will need to investigate and determine next steps on rate design and a regulatory framework following the Rate Task Force's process.

Why does engagement matter now?

The Task Force will shape reforms to rate design and ratemaking as AMI is deployed and utilities plan for rate cases

Advantageous window to consider policy and regulatory reform prior to full AMI deployment and several years before the conclusion of the EDCs rate case stay-outs or before future energy efficiency plans and electric sector modernization plans



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How will this work matter?

Comprehensive inquiry is critical

Massachusetts will need supportive policies, utility business models, and regulatory mechanisms to ensure an orderly and fair transition to a clean energy future, while guaranteeing safe, reliable, affordable, and equitable electric service as the Commonwealth advances towards its climate change mandates.

The DPU will be better equipped to investigate and determine next steps on rate design and a regulatory framework following the Rate Task Force's process and DOER is committed to advancing this work.

DOER, informed by the IRWG's work, considers it important to take proactive steps to investigate the appropriate rate designs and regulatory mechanism for the EDCs as the Commonwealth transitions to a clean, electrified, and decarbonized energy future.

An investigation will provide the platform for the DPU to assess fully the prevailing concerns and relevant issues facing EDCs, customers, and other stakeholders and formalize policies regarding AMI-enabled rate designs and ratemaking and regulatory mechanisms.

Rate design as phase one

This phase will allow the DPU to provide necessary guidance for the EDCs to prepare for the timely implementation of rate design changes, including, but not limited to existing, modified, or new requirements for their next base distribution rate case filings.

Regulatory framework as phase two

This phase will allow the DPU to provide guidance on the implementation of the policy and regulatory framework to ensure the continued development and operation of an efficient electric power system to advance affordability and customer needs, in addition to any legislative initiatives required to support the Commonwealth's climate policy and actions.

Task Force will use two distinct engagement opportunities

Expert Presentation Series

DOER will host an ongoing series of expert presentations on identified topics for the Massachusetts Electric Rate Task Force. These sessions will provide an overview of the relevant topics and an opportunity to hear from experts and other jurisdictions on related issues.

Each session will have four to five presentations from relevant experts, each with a 20 to 30-minute presentation on an identified topic.

The sessions will not be utilized for substantive deliberation between Task Force participants, though questions for expert presenters are encouraged.

Illustrative Presentation

Illustrative Expert Presentations

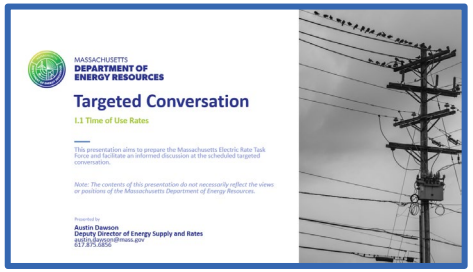
Targeted Conversations

DOER will lead targeted conversations with interested Task Force participants, scheduled to occur following the related expert presentations to prompt informed discussion on policy questions and priorities.

Following the expert-led presentation session, DOER will provide Task Force participants with a presentation that will guide the discussion at the forthcoming targeted conversation. For most sessions, but not all, DOER will share a supplementary working paper that will further detail primary issues and considerations.

DOER will host office hours and Task Force participants will be encouraged to deliberate outside of this session, but this will serve as a structured opportunity to work towards common understandings and positions.

Illustrative Presentation



Illustrative Working Paper

Rate design will be the focus of phase one

Tools for least-cost electrification and decarbonization

- The IRWG explored rate designs that would provide more cost-reflective price signals and enable customers to lower their utility bills through managing the timing and volume of their electricity usage.
- Enabling load management, including peak demand reductions, will support least cost and affordable electrification and decarbonization
  - Focus was on residential customers; however, commercial and industrial customers contribute approximately an equal share towards peak demands and drive electric power system investments that could be deferred or avoided

1. Time of Use Rates

Expert Presentation: May 19, 2025
Targeted Conversation: May 28, 2025

Review of IRWG TOU proposal and design considerations

2. Alternative Rate Designs

Expert Presentation: Jun 9, 2025
Targeted Conversation: Jun 18, 2025

Optional CPP rate, advanced rates, applicable program or policy for use in fixed charge

3. Bill and DER Impacts

Expert Presentation: Jun 30, 2025
Targeted Conversation: Jul 9, 2025

Integration with DG/DER and customer bill impacts

4. Implementation and Protections

Expert Presentation: Jul 21, 2025
Targeted Conversation: Jul 30, 2025

Implementation considerations, billing system capabilities and rollout, and customer protections

5. Marketing, Education, and Outreach

Expert Presentation: Aug 4, 2025
Targeted Conversation: Aug 13, 2025

Critical planning and implementation for rollout

Regulatory framework will be the focus of phase two

Reexamination of Massachusetts' existing regulatory framework

- The IRWG explored several regulatory and ratemaking mechanisms to support the critical components in the DPU's mandate to prioritize affordability, equity, and emissions reductions, in addition to safety and reliability of service.
- The Commonwealth is at an inflection point in its energy transition due to the horizon of significant load growth, investments to modernize the electric grid, and AMI deployment
    - The regulatory environment should complement the Commonwealth's clean energy and climate goals driven by statutory requirements, while also encouraging the EDCs to develop innovative solutions to achieve those goals, particularly to support energy affordability, efficiency and flexibility of the grid, reliability of our electric system, and the electrification of our energy consumption.

1. Ratemaking and Utilities

Expert Presentation: Aug 25, 2025
Targeted Conversation: Sep 3, 2025

Overview of current and evolution of ratemaking in MA

2. Tools of Utility Regulation

Expert Presentation: Sep 8, 2025
Targeted Conversation: Sep 17, 2025

Utility incentives and alternative mechanisms

3. Multi-Year and Formula Rates

Expert Presentation: Sep 29, 2025
Targeted Conversation: Oct 8, 2025

Multi-year rate plans and formula-based rates

4. Decoupling and Capital Recovery

Expert Presentation: Oct 22, 2025
Targeted Conversation: Oct 27, 2025

Revenue decoupling and capital recovery mechanisms

5. Performance Mechanisms

Expert Presentation: Nov 10, 2025
Targeted Conversation: Nov 19, 2025

Performance incentives and earning sharing mechanisms

Topics out of scope

The Rate Task Force cannot cover all topics and issues; to better target time and attention to relevant discussions, the following sub-topics are out of scope. Generally, these topics are subject to other open proceedings, forums, etc.

Rate Design Subtopics

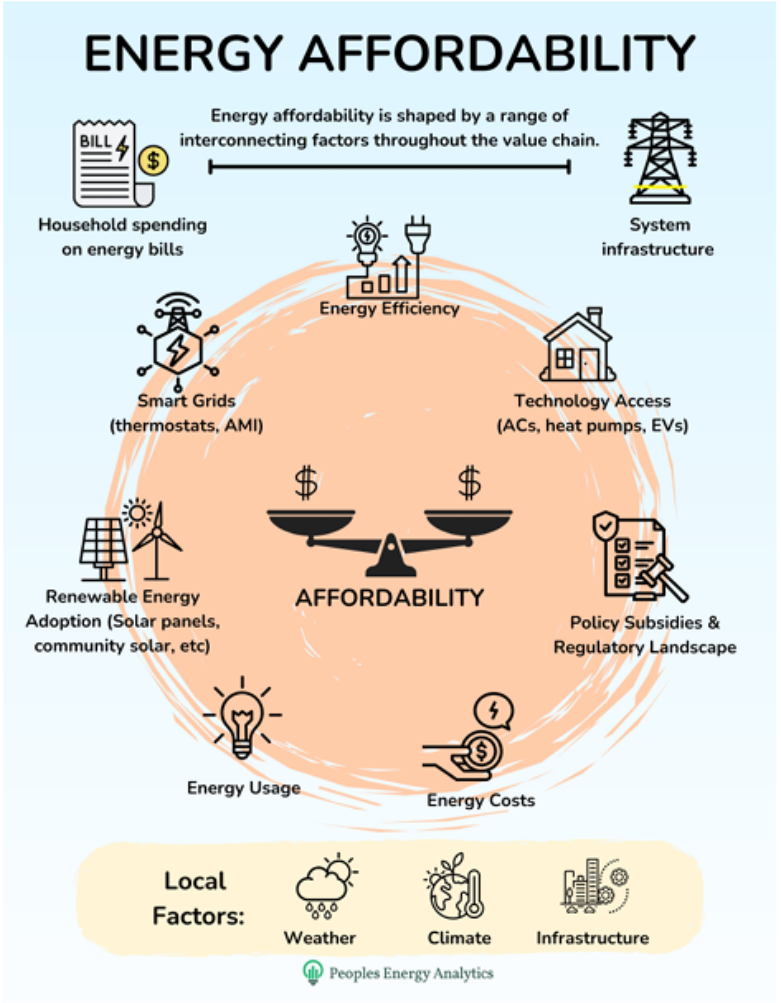
- **Basic Service Design:** DPU has open investigation (23-50) on basic service procurement and indicated it will address TVR basic service in Phase 2
- **Muni Agg Supply Design**: Promising opportunity for innovative products with consumer protections; though less in DPU control
- **Data Access**: DPU will address EDCs data access framework in separate proceeding as required by St. 2024, c. 239
- **Competitive Supply**: Supply should be time-varied, but competitive suppliers for residential customers is inadvisable and is not under consideration
- **Net Metering Rulemaking**: While net metering will be implicated during the implementation of TVR; specific changes to net metering to be addressed in rulemaking and/or require change of law
- **Discount Rates:** DPU open investigation (24-15) is considering the implementation of tiered discount and will investigate moderate income discounts by St. 2024, c. 239

Regulatory Framework Subtopics

- **Exhaustive Performance Metric Design:** Metric development is complex and outside the scope of the Task Force; cautions the expanded use of performance mechanisms and incremental financial incentives as layered tools on existing framework
- **Non-Ratepayer Funding:** While a recommendation of the IRWG, the DPU is not the audience, nor has the authority to make tax revenue available for policy costs and Office of Energy Transformation is addressing more fully
- **Grid Services:** Rate design, particularly for residential customers, can meaningfully vary prices temporally; however, DG and DER remain tools to address locational capacity constraints with appropriate compensation as is being considered through the Grid Services Study

Equity and environmental justice lens

- Following stakeholder feedback, the IRWG included Dr. Destenie Nock in our work, and she conducted analysis and drafted accompanying reports to our recommendations.
- Energy affordability ensures that households can access the energy they need to maintain comfortable living conditions, participate in modern society, and manage energy costs without facing energy poverty or undue financial strain (see *Defining Energy Affordability* for additional details)
- Our exploration must ensure we:
  - Protect and empower low-income customers and other vulnerable populations
  - Deliver meaningful benefits to Environmental Justice communities
  - Supports a just transition to an electrified, decarbonized future



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Phase I Key Topics

50 min

Rate design and ratemaking priorities

The IRWG, informed by stakeholder feedback, developed the following near- and long-term priorities for rate design and ratemaking.

Promote electrification by removing operating barriers inherent in electric rates	• Design cost-based electric rates that encourage ratepayers to electrify end-uses • Create rate design features targeted to reduce energy burden for ratepayers – while maintaining safe and healthy living conditions
Increase adoption of cost-effective distributed energy resources (DER) to advance decarbonization and electrification	• Promote DER and equitably allocate costs (e.g., the costs of interconnection, incentive programs, etc.) through rate design
Integrate distribution system planning into the utility's business-as-usual operations and investments	• Promote least-cost electric system investments that accommodate transportation and building electrification and other new loads
Promote operational efficiency to facilitate the transition of the distribution grid	• Utilize price signals to achieve effective load management, including peak demand reduction, which may defer or avoid electric system investments • Improve grid reliability, efficiency, and resiliency

Statutory and regulatory parameters for rate design

DPU has broad authority over electric rates, though statute provides the following directives

- The DPU must "prioritize **safety, security, reliability of service, affordability, equity and reductions in greenhouse gas emissions** to meet statewide greenhouse gas emission limits and sublimits"

  G.L. c. 25, § 1A; emphasis added

- In decisions or actions regarding rate designs, the DPU must consider the impa**cts on "(i) on-site generation;. . . (iii) the reduction of greenhouse gases as mandated by chapter 21N to reduce energy use; (iv) efforts to increase efficiency and encourage non-emitting renewable sources of energy; . . . and (vii) the use of new financial incentives to support energy efficiency efforts."**

  G.L. c. 164, § 141; excerpted and emphasis added

DPU has utilized the following principles to evaluate rate structures and designs

- **Efficiency:** provide accurate basis for consumers' decisions about how to meet their needs and recovers the cost to society of the consumption of resources to produce the utility service (i.e., cost-based)
- **Simplicity:** easily understood by consumers
- **Continuity:** changes to rate structure should be gradual to allow consumers time to adjust their consumption patterns in response to a change in rate structure
- **Fairness:** each customer class should pay no more than the costs of serving that class
- **Earnings Stability:** amount a company earns from its rates should not vary significantly over a period of one or two year
- **Equity:** rate structure considers affordability among customers in establishing rate classes and when establishing discount rates for low-income customers

D.P.U. 23-150 Order at 476-477

Phase one key topic exploration

Framing

- For each key topic, we will revisit the related IRWG recommendations and preview the associated expert presentations planned to prepare the Task Force for a targeted conversation
- The following questions will be shown on each slide to prompt what questions participants think need to be answered:
  - What questions do you think we need to answer before advancing on this topic?
  - What's unclear, unsettled, or underexplored?
  - What are your biggest concerns or priorities related to this topic?
- DOER will use this input to inform presenters of Task Force participant interest and to guide the preparation of working papers and/or structure of the targeted conversation

IRWG Recommendations

On rate design and related issues, the IRWG made several recommendations which drove the development of the five key topics.

DOER, or another member agency of the IRWG, will start the expert presentation session with a more fulsome review of the recommendations.

Expert Presentations

Each session will have four to five presentations from relevant experts, each with a 20 to 30-minute presentation on an identified topic.

Sessions will provide an overview of the relevant topics and an opportunity to hear from experts and other jurisdictions on related issues.

Time of use rates

- What questions do you think we need to answer before advancing on this topic?
- What's unclear, unsettled, or underexplored?
- What are your biggest concerns or priorities related to this topic?

IRWG Recommendations

- Deploy default seasonal residential time-of-use (TOU) rates
  - Default rather than opt-in; all customers are enrolled, with measures to protect vulnerable customers
  - Time-vary supply, transmission, and distribution – as applicable – costs of each unbundled service are, in part, temporally-driven
    - Consolidated peak periods for supply, transmission, and distribution charges to provide customers with simple and coherent price signals, despite lost granularity or precision
  - Peak periods should be sufficiently narrow to capture most critical hours for reducing demand and reflect actual peak period system costs and peak to off-peak price ratio be meaningful enough to shift customer usage without being punitive
- Utilize the period ahead of full AMI deployment (i.e., 2025 to 2029) to conduct the necessary investigation and education necessary to enable the availability of widespread TOU rates when AMI is deployed

Expert Presentations

I. IRWG Recommendations

Massachusetts Department of Energy Resources, Austin Dawson & Mike Giovanniello

Present the IRWG's recommendations on rate design and key principles for peak period timing and peak to off-peak price differentials

II. ISO-NE Perspective on Rate Designs

ISO-New England, Dennis

Present on the wholesale markets and costs for energy, capacity, and transmission in New England and their relevance to the design and implementation of variable retail rates

III. Time of Use Rate Design in Maine

Maine Public Utilities Commission, Chair Phillip L. Bartlett II

Present Maine's process for developing time of use rates and its most recent findings and recommendations

IV. Marginal Cost Studies & Application for Rate Design

Charles River Associates, Amparo Nieto

Present approach of marginal cost of service studies and the use of the marginal cost of service study in supporting time-of-use period analysis in establishing delivery rate design

V. Maryland TOU Process

Molly Knoll, Former Co-Chair of Maryland Rate Design Work Group

Present on Maryland's process to design TOU rates through the Rate Design Work Group

Note: Presentations and expert presenters are subject to change based on scheduling and speaker availability

Alternative rate designs

- What questions do you think we need to answer before advancing on this topic?
- What's unclear, unsettled, or underexplored?
- What are your biggest concerns or priorities related to this topic?

IRWG Recommendations

- Consider an opt-in residential critical peak pricing rate rider for TOU rate customers
- Consider further advanced rate designs following deployment of AMI and default seasonal TOU rates
  - Encourage additional methods for load management, or to reduce peak demand, through rates for residential, commercial, and industrial customers, including:
    - Export tariffs – considered alternative to net metering, provides price signal for export as done for import
    - Non-firm or limited import tariffs – service that provides EDCs operational flexibility during periods of grid constraints
    - Day-ahead tariffs – rates based on following day's expected electricity prices
    - Real-time pricing – charges customers for supply costs based on electricity prices that fluctuate throughout the day
- Consideration of a fixed charge for public benefits programs (e.g., Mass Save)

Expert Presentations

I. Alternative Rate Design Options

Regulatory Assistance Project, Mark LeBel

Present on efficient social marginal cost pricing, demand charges, and critical peak pricing.

II. Residential Demand Charges

MA Electric Distribution Companies

Present on the design, application, and implications of demand charges for residential customers

III. Fixed Charge for Policy Costs

Massachusetts Institute of Technology, Chris Knittle

Present analysis on policy fixed charges for customer's bills

I. Advanced Rate Designs

Current Energy Group, Ron Nelson

Present the IRWG's recommendations on a policy fixed charge and on advanced rate designs in the longer term, including optional CPP, export tariffs, etc.

Note: Presentations and expert presenters are subject to change based on scheduling and speaker availability

Bill and DER impacts

- What questions do you think we need to answer before advancing on this topic?
- What's unclear, unsettled, or underexplored?
- What are your biggest concerns or priorities related to this topic?

IRWG Recommendations

- Consider more granular rate impact analysis, that considers energy cost impacts on a variety of Massachusetts' households; including, but not limited to customers who have adopted or will adopt DG and DER
- Evaluate the interactions and impacts on other key ratepayer-supported initiatives, policies, and programs, such as the Renewable Portfolio Standard (RPS), Clean Peak Standard (CPS), Solar Massachusetts Renewable Target (SMART) program, and net metering

Expert Presentations

I. IRWG Recommendations

Massachusetts Clean Energy Center, Sarah Cullinan

Present on the application of granular rate impact analysis, as demonstrated by HEEM

II. Household Energy Expenditure Model (HEEM) Impacts

Energy and Environmental Economics, Inc., Ari Gold-Parker & Andrew DeBenedictis

Present the bill impacts of TOU rates, as modeled through HEEM and explore bill impacts to DG/DER owners

III. Impacts on DER and Existing Policies and Incentive Programs

Massachusetts Department of Energy Resources, Samantha Meserve

Present the impacts of time of use rates on existing policies and incentive programs that incentivize solar and storage resources in the Commonwealth

IV. Smart DER Tariffs

Hawaii Public Utilities Commission, Caroline Ishida

Present the implementation of long-term DER programs in Hawaii that includes smart DER tariffs and bring-your-own-device tariffs

Note: Presentations and expert presenters are subject to change based on scheduling and speaker availability

Implementation and protections

- What questions do you think we need to answer before advancing on this topic?
- What's unclear, unsettled, or underexplored?
- What are your biggest concerns or priorities related to this topic?

IRWG Recommendations

- Critical bill protections, such as shadow billing and bill stabilization, be considered to mitigate unintended harms from a default TOU rate.
  - If appropriate, certain customers with limited load flexibility may need to be excluded from the TOU rate to ensure vulnerable customers are not impacted adversely
- Important to monitor, evaluate, revise the performance of AMI-enabled rates to:
  - respond to changes in energy load patterns, particularly as the Commonwealth switches from summer-peaking to winter-peaking
  - ensure that customers are adequately protected as new rate designs are implemented
  - monitor for impacts on energy burden and affordability

Expert Presentations

I. Affordability and Equity in Retail Rate Design

Peoples Energy Analytics, Dr. Destenie Nock

Present on Peoples Energy Analytics' recommendations included in the IRWG's Near- and Long-Term Recommendations for electric rate designs

II. TOU Learnings from Other Jurisdictions

Synapse Energy Economics, Melissa Whited

Present and implications of TVR on low-income customers and share lessons learned from other jurisdictions on customer communication, customer protections, and rollout strategy

III. Massachusetts Implementation of TOU Rates

MA Electric Distribution Companies

Present the billing system capabilities for the roll-out of default TOU and customer protections for MA customers

IV. Customer Protections in TOU Roll-Outs

California Public Utilities Commission, Paul Phillips & Achintya Madduri

Present customer protections, including bill stabilization, shadow billing, and customer exclusions, etc.)

Note: Presentations and expert presenters are subject to change based on scheduling and speaker availability

Marketing, education, and outreach

- What questions do you think we need to answer before advancing on this topic?
- What's unclear, unsettled, or underexplored?
- What are your biggest concerns or priorities related to this topic?

IRWG Recommendations

- **EDCs to prepare an MEO plan** in coordination with stakeholders, including customers, to accompany any TVR rate design approved by DPU
- MEO efforts should tailor efforts to mitigate or remove barriers to provide experience for customers that is as **transparent, convenient and frictionless** as possible
- MEO efforts should be **evaluated and revised regularly**, including message testing, and identifying & tracking key performance indicators such as participation rates, penetration rates, bill savings, energy limiting behavior, customer satisfaction, customer engagement level
- **Cost-effectiveness** of MEO efforts should be tracked and evaluated

Expert Presentations

I. IRWG Recommendations

Massachusetts Attorney General's Office, Courtney Henderson

Present the IRWG's recommendations, focusing on customer-centric principles that should drive MEO efforts or activities

II. Personalized Rate Education and Customer Empowerment Tools

GridX, Rachel Bryant

Present a personalized rate education and suite of customer empowerment tools to encourage responsive customer behavior and customer retention.

III. Statewide Default Roll-Out in Michigan

Michigan Public Service Commission

Present on default TOU roll-out and coordination of utility marketing, education, and outreach

IV. TOU Lessons from Missouri

Missouri Public Utilities Commission, Geoff Marke

Present on lessons learned from the implementation and challenges of TOU roll-out

V. TOU in Hawaii

Hawai'i Public Utilities Commission

Present on TOU implementation in Hawaii, including relevant marketing, education, and outreach efforts

Note: Presentations and expert presenters are subject to change based on scheduling and speaker availability

Next Steps and Closing

10 min

Phase one schedule

April

M	T	W	Th	F
	1	2	3	4
7	8	9	10	11
14	15	16	17	18
21	22	23	24	25
28	29	30 Kick-Off		

May

M	T	W	Th	F
			1	2
5	6	7	8	9
12	13	14	15	16
19 I.1	20	21	22	23
26	27	28 I.1	29	30

June

M	T	W	Th	F
2	3	4 OH	5	6
9 I.2	10	11	12	13
16	17	18 I.2	19	20
23	24	25 OH	26	27
30 I.3				

July

M	T	W	Th	F
	1	2	3	4
7	8	9 I.3	10	11
14	15	16 OH	17	18
21 I.4	22	23	24	25
28 OH	29	30 I.4	31	

August

M	T	W	Th	F
				1
4 I.5	5	6 OH	7	8
11	12	13 I.5	14	15
18 Debrief	19	20	21	22
25	26	27	28	29

Legend

- Task Force Meetings (2 hrs)
- Expert Presentation Series (2.5 hrs)
- Targeted Conversations (2 hrs)
- Optional Office Hours - OH (2 hrs)

Next steps and closing

Next steps

- DOER will send out invitations for the expert presentation sessions, targeted conversations, and optional office hours for Phase I: Rate Design
- DOER welcomes questions or comments that we may not have answered today as we approach the first expert presentation
- Recommend reviewing Long-Term Ratemaking Recommendations before expert presentation on May 19, 2025
  - Focus on pages 1-9 (background) and 11-29 (rate design)

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Thank You!