



MASSACHUSETTS  
**DEPARTMENT OF  
ENERGY RESOURCES**

# Marketing, Education and Outreach (MEO)

Targeted Conversation | August 13, 2025

This presentation will be used to guide the Massachusetts Electric Rate Task Force's targeted conversation, designed to facilitate an open, inclusive dialogue and frame critical questions and opportunities.

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

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# 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



# MEO Expert Presentations

## I. Marketing, Education, & Outreach (MEO)

**Hawks Peak Strategies, Dr. Courtney Henderson**

Present on the opportunities to leverage MEO to better serve customers and the IRWG near- and long-term recommendations

## II. Missouri's Time of Use (TOU) Experience

**Missouri Office of the Public Counsel, Geoff Marke, PhD**

Present on the roll-out of TOU in Missouri, the opportunity of TOU rates, and lessons learned.

## III. MEO for Time-Varying Rate (TVR) Programs – Best Practices Across U.S.

**GridX, Michael Pirro**

Present on best practices and common challenges in implementing TVR, in addition to a case study of customer experience and education

## IV. Dynamic Rates Engagement

**Oracle, Samantha Caputo**

Present on leveraging AMI for customer engagement and empowerment through the deployment of dynamic rates, in addition to a case study of a utility deployment

## V. Embedded Intelligence in the Electric Grid

**Sense, Mike Phillips**

Present on the opportunities of edge computing and real-time applications for customer engagement and home/grid optimization

### Build technical knowledge

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



### Develop shared understanding

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



# Targeted Conversations

The 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.

- Targeted conversations are intended to facilitate open, inclusive dialogue and frame critical questions and opportunities
- 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.

## Facilitate open, inclusive dialogue

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



## Frame critical questions and opportunities

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



# Agenda

- I. Introduction (10 mins)
- II. IRWG Recommendations (45 mins)
- III. Break (5-10 mins)
- IV. MEO Implementation and Ongoing Efforts (45 mins)
- V. Next Steps & Close (5 mins)



# IRWG Recommendations (45 mins)

# IRWG Recommendations on MEO

**The IRWG recommends the EDCs prepare an MEO plan, in coordination with stakeholders, including customers, to accompany the implementation of any TVR rate design approved by the DPU**

MEO efforts should identify potential barriers to participation and then tailor MEO efforts to mitigate or remove those barriers to create an experience for customers that is as **transparent, convenient, and frictionless** as possible. While the specific approaches and goals of the EDCs' MEO efforts will vary for each specific rate, program, and initiative, and by location, in general, MEO efforts should be **customer-centric** and should:

- Minimize technical terms that can cause frustration and/or confusion to customers;
- Use plain-language terms that are simple and easy for customers to relate to and understand;
- Provide a single point of contact for all (or several) relevant rates/programs/initiatives;
- Reduce and simplify documentation and/or verification requirements;
- Ensure that customers can easily reach knowledgeable EDC staff with any questions (e.g., customer service representatives that answer calls or website inquiries should know the answer to questions or know how to get the answer to questions quickly);
- Recognize, prepare for, and respond to language needs for limited English proficiency customers;
- Tailor efforts to meet customers where they are (e.g., by providing the right information so that customers make informed choices);
- Use language that resonates with audiences of different cultural backgrounds (i.e., a multicultural communication strategy);
- Recognize that different communities will have different barriers to participation, different needs, and different motivations and may respond to messaging differently;
- Use a variety of outreach channels (e.g., email, phone, radio, internet, social media, and in-person events);
- Encourage collaboration and partnerships with community members and community groups, particularly from communities that are underrepresented in the clean energy transition and/or in the specific rate/program/initiative;
- Target individual households based on their needs and risks;
- Use meter (and eventually AMI) energy usage data along with available income data to identify the risk types that households face, and then communicate opportunities for electrification and reduction of financial burdens to these households;
- Use direct to household channels (e-mail, texting, in-app messages) to communicate about programs that benefit low-income households.



# IRWG Recommendations on MEO

**In designing MEO efforts, EDCs should draw from best practices, MEO professionals, and the experience of other utilities, including utilities in the Commonwealth as well as other jurisdictions**

To ensure that MEO efforts are effective, they should be evaluated regularly and revised as needed, including message testing (qualitative and quantitative) before material is deployed and identifying and tracking key performance indicators. Appropriate key performance indicators include:

- Participation rates (including enrollment rates);
- Penetration rates (i.e., the number of eligible customers who participate in a rate or program) at the census tract or block group level;
- Bill savings;
- Energy limiting behavior (i.e., households that under-consume energy during summer and winter months);
- Customer satisfaction; and
- Customer engagement level.

The following should also be tracked:

- Penetration rates of smart devices, given that smart technologies are key for enabling customers to respond to TOU prices
- Cost-effectiveness of implementing the EDCs' MEO efforts should be tracked and evaluated (e.g., cost per leads, advertising response rates, etc.). This information should be shared publicly online in a format that is easy to find and understand, and not solely in utility filings.

Given the novelty of TVRs for ratepayers in the Commonwealth, the EDCs should pursue opportunities to conduct targeted deployments of TVRs and related MEO campaigns during the next 4 to 5 years as AMI functionality becomes available in pockets of the state before the full-scale rollout of AMI is complete. Smaller-scale, targeted deployments could be a helpful tool for testing and iterating effective rate designs, as well as the appropriate MEO approaches. It is critical, however, that these opportunities to test and learn do not delay the scaling of TVR and therefore delay customer benefits.





# IRWG Recommendations on MEO

## Several of the IRWG's MEO recommendations are directly linked to Dr. Nock's recommendations

- Minimize technical terms that can cause frustration and/or confusion to customers;
- Use plain-language terms that are simple and easy for customers to relate to and understand
- Tailor efforts to meet customers where they are (e.g., by providing the right information so that customers make informed choices)

### L1. TVR price signals should be communicated in a way that is meaningful to customers

**Recommendation:**

Use monthly bill impact estimates, not just technical jargon.

**Why:**

- Customers understand dollars, not kilowatt-hours or dollars/kWh.
- Clear communication builds trust and participation.

**Example:**

*"Your new rate plan could save you \$65/month if you pre-cool your home in the summer using a programmable thermostat."*



# IRWG Recommendations on MEO

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The following should also be tracked:

- Penetration rates of smart devices, given that smart technologies are key for enabling customers to respond to TOU prices

L2. The Commonwealth should ensure equitable access to the technologies that facilitate participation in load shifting;

**Recommendation:**

Provide affordable access to enabling technologies such as:

- Smart thermostats
- Load management devices
- Energy storage (where applicable)

**Why:**

- Without tools, low-income households can't shift use—leading to higher bills.



# MEO are key to an effective rollout of TOU rates

## Expert Presentation Key Findings

- An MEO plan helps gain buy-in from diverse stakeholders and ensures an implementable plan that is customer-centric, cost-effective, strategic, and targeted.
- An effective MEO plan identifies potential barriers to participation, tailors MEO efforts to mitigate and remove those barriers, and uses meter energy usage data to target communications to individual households about opportunities to reduce their financial burden.
- Consider politics during roll-out: get stakeholder buy-in and have clear, consistent, and targeted communication and education.
- Customers are inundated with advertising but, with the help of new technologies, utilities are well positioned to offer targeted, effective tools to communicate about the potential benefits of TOU rates for customers.

## Key Takeaways

- The IRWG's MEO recommendations are a good guide for MEO efforts and should be further refined and expanded upon with the help of stakeholders, customers, and MEO professionals
- Leveraging data analytics, with the help of AMI data, for targeted messaging to specific customers is key to ensuring customers benefit from TOU rates

# Utilities are familiar with MEO plans

- MA EDCs have experience implementing MEO plans
- Utilities across the country implement MEO plans that MA can draw additional practices from
- MEO plans are most effective when created in coordination with stakeholders, customers, and MEO professionals



The Massachusetts 2025-2027  
Energy Efficiency and Decarbonization Plan

October 31, 2024

WE ARE MASS SAVE®:

Berkshire Gas

An Avangrid company

EVERSOURCE

nationalgrid

masssave.com

	Massachusetts			Neighboring Jurisdictions		
	Unitil Massachusetts	Concord Municipal Light Plant	Groton Municipal Light Plant	Eversource New Hampshire	Unitil New Hampshire	National Grid New York
Participation	Opt-In for EV Owners	Opt-in	Seasonal Opt- In	Opt-in	Opt-in	Seasonal Opt- In
Peak Period(s)	Mid-peak: 6am-3pm On-peak: 3pm-8pm	12pm-10pm	4pm-8pm	7am-8pm	Mid-peak: 6am-3pm On-peak: 3pm-8pm	Summer: 2pm-6pm Non-summer: 7am-11pm
Peak:Off- Peak Ratio	2.15	1.76	Winter: 6.14 Non-winter: 10.0	3.03	4.47	5.97

**Break: 5-10 minutes  
(if time allows)**





# MEO Implementation and Ongoing Efforts (45 minutes)

# Testing & Iterating MEO Efforts

## How should we be preparing customers with MEO *before* implementation of TOU rates?

- Around 200,000 customers already have AMI generating usage data
- Dr. Henderson, as well as the IRWG recommendations, note the importance of testing and iterating targeted deployments of TVRs and related MEO efforts before the full deployment of AMI is complete:

*“Given the novelty of TVRs for ratepayers in the Commonwealth, **the EDCs should pursue opportunities to conduct targeted deployments of TVRs and related MEO campaigns during the next 4 to 5 years as AMI functionality becomes available in pockets of the state before the full-scale rollout of AMI is complete.** Smaller-scale, targeted deployments could be a **helpful tool for testing and iterating effective rate designs, as well as the appropriate MEO approaches.** It is critical, however, that these opportunities to test and learn do not delay the scaling of TVR and therefore delay customer benefits.”*

- There are lessons that can be learned across jurisdictions, but there may also be lessons that are specific to MA customers.

**YES!**

*This is a great opportunity to innovate our MEO efforts, and to target & test MEO.*

# Pre-Implementation MEO

Around 200,000 customers already have AMI meters that are generating usage data. What are the benefits of using this data now to develop pre-TVR MEO strategies?

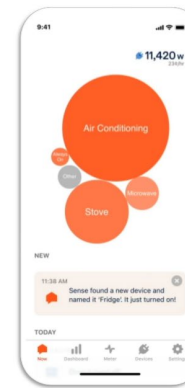
## For Customers:

- **Understand their own consumption patterns:** customers can identify usage trends and opportunities to reduce energy usage.
  - ❑ Disaggregation apps like Sense can illustrate usage across specific electric technologies (National Grid to rollout in CY 2026).
- **Evaluate bill savings opportunities:** customers can assess the value of potential energy efficiency and DER upgrades, such as electric heating and cooling, batteries, and solar.

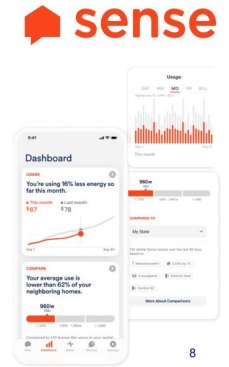
## For Utilities:

- **Refine baseline load forecasts:** load forecasts can utilize granular consumption data to more accurately reflect load.
- **Design effective programs:** demand response, load management, and DER incentive program designs can be refined to target customers' unique consumption patterns.

### Sense App Overview

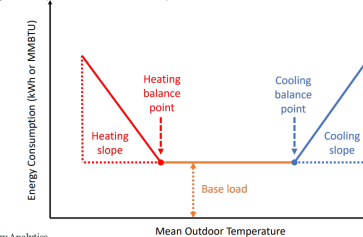


- Customer data is processed by Sense and stored on the meter, NG will not have access to the data
- Offered in addition to Opower near real-time usage widgets on MyAccount portal at no additional cost to customers
- Shows energy usage down to appliance-level
- Customers opt-in to create account and consent to share energy usage data from their L+G Revelo smart meter
- Meter must be within range of customer's home wifi router
- Sense must collect approx. 2 weeks of customer's data before effective use
- Sense is downloaded on the Edge Intelligence Card (EIC) on the meter, kept separate from metrology



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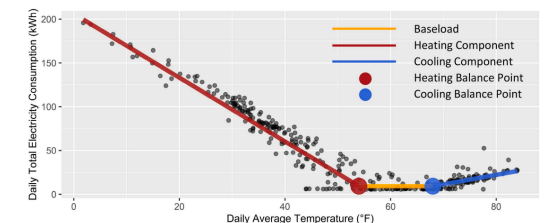
Meter Data at household level can be used to understand energy consumption behavior for individual households and heating and cooling use (or lack thereof).



Peoples Energy Analytics

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Household with electric heating but no central AC (most likely a window unit)



Peoples Energy Analytics

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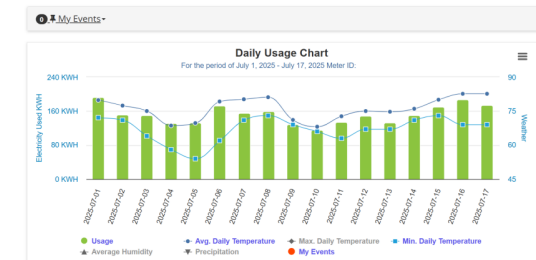
# AMI Data Can Be Used to Prepare Customers for Future TVRs

How can the EDCs use AMI data to develop pre-TVR MEO tools to prepare customers for TVRs?

- **Personalized insights:** send monthly custom energy profiles to customers that illustrate peak usage periods.
- **Targeted customer segmentation:** identify high-usage customers and tailor MEO strategy accordingly.
- **Dynamic simulations and representative bills:** develop sample bills, bill forecasts, and TVR simulation tools that highlight potential savings.

Developing MEO tools before full AMI deployment and TVR implementation is *essential* to maximizing the benefits of advanced rates.

## Unitil- AMI Customer Experience Items

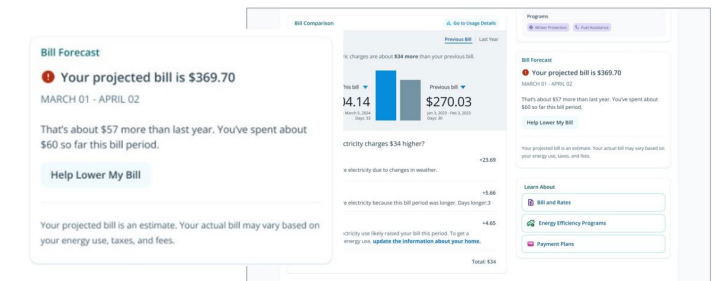


- Current Daily Usage Chart
  - Weather Overlay
  - "My Events"
- Looking to Launch GBC by end of year
- Opt-In High Usage Alert offering in 2026



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## Bill Forecast on eversource.com (2 months)

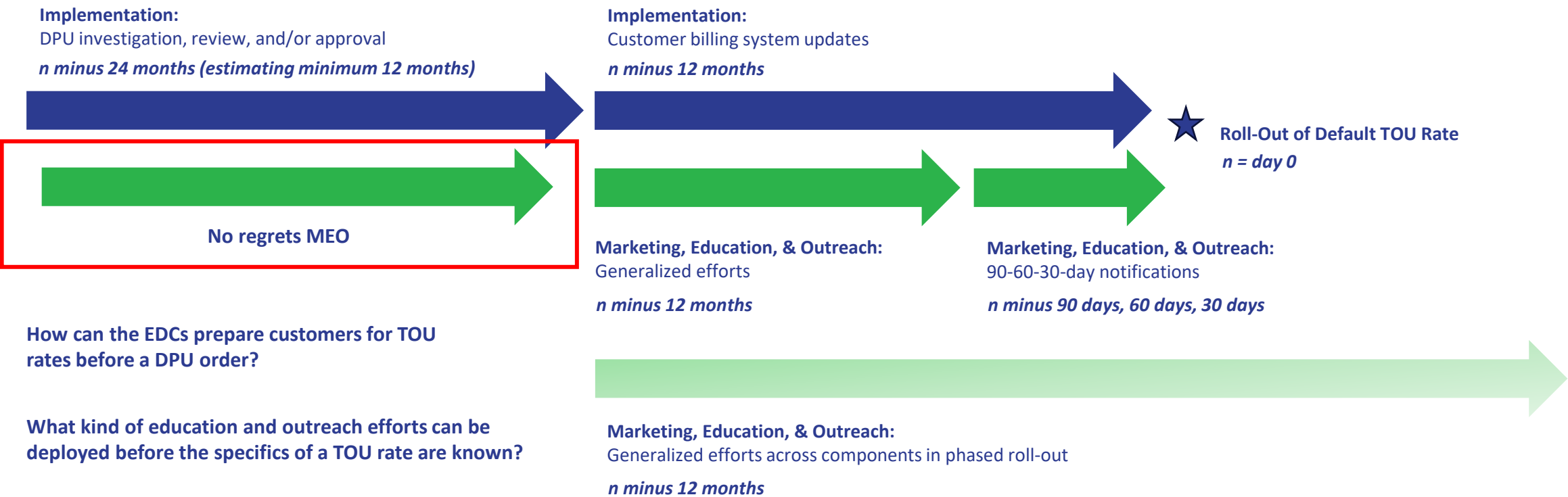


EVERSOURCE | AMI Program

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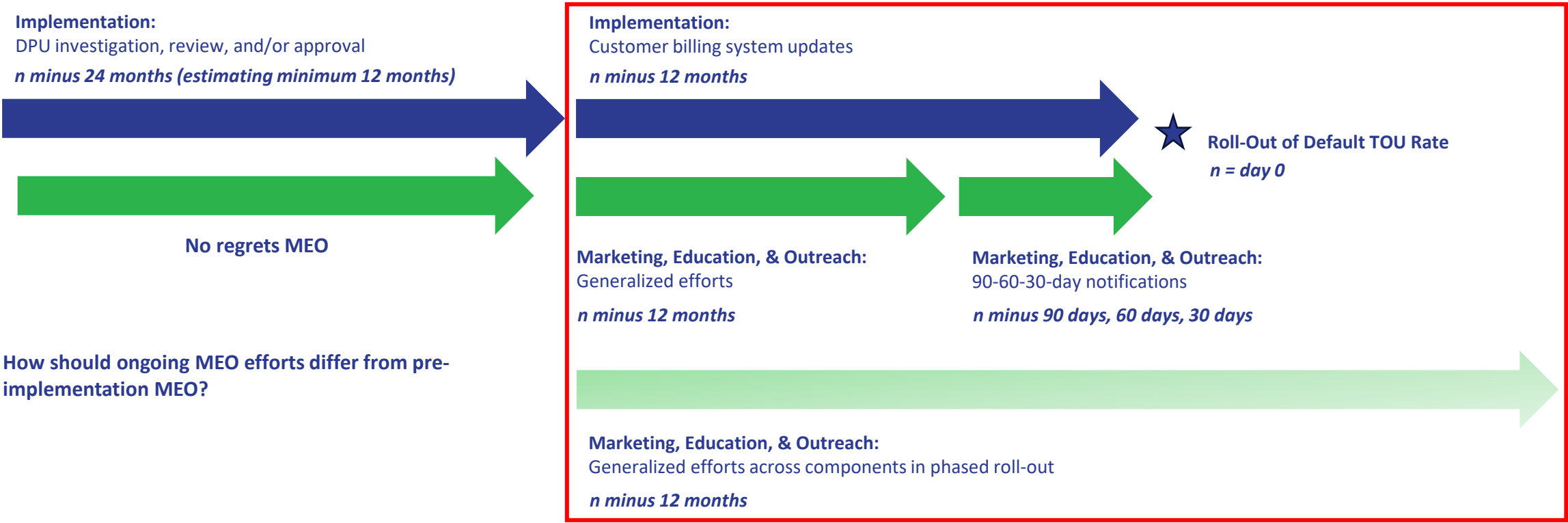
# Leverage the opportunity to overlap planning, implementation, and outreach

The following timeline is generalized (i.e., aims to be applicable for each component: Basic Service, transmission, distribution, and third-party supply) and offered as a starting point for conversation.



# Leverage the opportunity to overlap planning, implementation, and outreach

The following timeline is generalized (i.e., aims to be applicable for each component: Basic Service, transmission, distribution, and third-party supply) and offered as a starting point for conversation.



# Closing

## Next Steps

### Phase 1 Debrief

- August 18, 2025 from 1:00-3:30pm

In-person option available – email Chris Connolly at [chris.connolly2@mass.gov](mailto:chris.connolly2@mass.gov) by EOD Friday, August 15