

Cape Light Compact JPE Executive Committee & Governing Board Meeting

DATE: Wednesday, March 27, 2024
LOCATION: Cape Light Compact Offices – Martha’s Vineyard Conference Room
261 Whites Path, Unit 4, South Yarmouth
TIME: 2:00 – 4:30 p.m.

Note: The meeting will be held as a hybrid meeting (in-person and through remote participation) pursuant to St. 2023, c. 2, which, among other things, extends the temporary provisions pertaining to remote meetings of public bodies under the Open Meeting Law to March 31, 2025. Members of the Public can join in by audio and follow along with Meeting Materials, see the information below. Written public comments should be submitted to Maggie Downey, Compact Administrator, at mdowney@capelightcompact.org by 2:00 PM on Tuesday, March 26, 2024, and should follow the public comment protocol below. Written public comments received after the March 26th deadline will be distributed prior to the Compact’s next Board meeting.

Telephone dial-in: +1 (646) 558-8656

Meeting ID: 843-2830-6359

Passcode: 006065

AGENDA

1. Public Comment
2. Approval of February 28, 2024, Open Session Minutes
3. Chairman’s Report, Martin Culik
 - a. Report in on non-profit offering update to Select Boards/Town Council
4. 2025-2027 Energy Efficiency Plan, Margaret Song and Briana Kane
5. Update on the USDA Rural Utilities Service (RUS) Rural Energy Services Program (RESP): Cape Light Compact Solar Loan Program, Erin O’Toole, KO Law
6. Discussion and Potential Vote on the Cape Light Compact’s Renewable Portfolio Standard (RPS) Class I Statement of Qualification Application, Mariel Marchand
7. Administrator’s Report, Maggie Downey
 - A. MassHousing Grant: Outreach Assistance and Customer Support for Energy Saver Home Loan Program
 - B. Electric supply rate for Industrial customers
 - C. Department of Public Utilities – Notice of Road Show Events
 - D. Next Board Meeting is April 10

Board Member Update (Reserved for Updates on Member Activities the Chair Did Not Reasonably Anticipate Would be Discussed – No Voting)

Cape Light Compact Public Comment Protocols
for Governing Board Meeting
(June 2023)

The Cape Light Compact Governing Board has adopted the following protocols to assist the public in effective participation in its Governing Board meetings, where some Board Members, staff and members of the public may be participating remotely:

1. Members of the public are welcome to address the Compact Board during the public comment section of the meeting or in writing.
2. Members of the public addressing the Compact Board at the meeting must state their name, and if appropriate the name of the organization the person is representing. Oral comments must be limited to three minutes.
3. Members of the public may also submit written comments. Written comments shall be submitted in writing to the Compact Administrator, Maggie Downey, at mdowney@capelightcompact.org by 2 p.m. on the Tuesday before a scheduled Compact Governing Board meeting (or such other time as may be established by the Compact Administrator). Written comments must include a person's name and, if appropriate, the name of the organization the person is representing. Public comments received after the deadline will be distributed prior to the Compact's next Board meeting.
4. Members of the public addressing the Compact Board may not use fighting words, slander, unreasonably loud or repetitive speech, or speech so disruptive of the Compact Board meeting that the deliberative process is substantially interrupted or impaired. Speakers may not disrupt others. Speech must be peaceable and orderly.
5. All written public comments submitted in advance consistent with these protocols shall be included in the Compact's Board meeting packet.
6. Board members and staff cannot respond to public comments for topics not on the current agenda during the Board meeting. The Cape Light Compact Board may respond to comments either by putting them on the agenda of a subsequent meeting or by requesting the administrator or staff to respond to the comment.
7. Copies of the Board meeting packet will generally be made available to members of the public in advance of the meeting at the Cape Light Compact JPE's web site at www.capelightcompact.org Documents exempt from disclosure pursuant to the Public Records Law or protected by the attorney-client privilege shall not be included.

**Cape Light Compact JPE
Governing Board
Meeting Minutes
Wednesday, February 28, 2024**

The Cape Light Compact JPE Board of Directors met on Wednesday, February 28, 2024, at 2:00 p.m. The meeting was held as a hybrid meeting (in-person and through remote participation) through a Zoom videoconference for members of the Board with audio call-in available for members of the public, pursuant to St. 2023, c. 2, which, among other things, extends the temporary provisions pertaining to remote meetings of public bodies under the Open Meeting Law to March 31, 2025.

Participating In-Person Were:

1. Robert Schofield, Executive Committee, Bourne
2. Brian Miner, Chatham
3. Tom McNellis, Eastham
4. Matthew Patrick, Falmouth
5. Valerie Bell, Harwich
6. Martin Culik, Chair/Executive Committee, Orleans
7. Bob Higgins-Steele, Truro Alternate
8. Joyce Flynn, Vice Chair/Executive Committee, Yarmouth

Participating Remotely Were:

1. David Anthony, Secretary/Executive Committee, Barnstable
2. Sean Hogan, Barnstable Alternate
3. Bill Doherty, Bourne Alternate
4. Colin Odell, Executive Committee, Brewster
5. Alan Strahler, Edgartown
6. Wayne Taylor, Mashpee
7. Nicola Blake, Executive Committee, West Tisbury

Absent Were:

1. Forrest Filler, Aquinnah
2. Timothy Carroll, Chilmark
3. Meghan Gombos, Dukes County
4. Peter Meleney, Oak Bluffs
5. Nathaniel Mayo, Provincetown
6. Leanne Drake, Sandwich
7. Russ Hartenstine, Tisbury
8. Jarrod Cabral, Truro

Legal Counsel Participating Remotely:

Audrey Eidelman Kiernan, Esq., KO Law, P.C.

Consultants:

Kevin Galligan, Galligan Energy Consulting

Staff Participation In-Person:

Maggie Downey, Administrator

Staff Participating Remotely:

Anneliese Conklin, Data Analyst
Briana Kane, Residential and Commercial & Industrial Program Manager
Dan Schell, Senior Analyst - Retail and Demand Response
David Botelho, Data Analyst
Laura Selmer, Analyst
Lindsay Henderson, Senior Analyst - Small Business
Margaret Song, Energy Efficiency Strategy and Policy Manager
Miranda Skinner, Strategy and Regulatory Analyst
Melissa Allard, Senior Administrative Coordinator
Phil Moffitt, Chief Financial Officer
Stephen McCloskey, Analyst - Home Energy Services
Tatsiana Nickinello, Energy Efficiency Analyst

Public Participants:

Suzanne Ryan-Ishkanian

Martin Culik called the meeting to order at 2:04 PM.

Public Comment:

No written comments were received in advance of the meeting and no members of the public were present for public comment.

APPROVAL OF MINUTES:

The Board considered the January 28, 2024 Open Session and Executive Session Meeting Minutes.

Joyce Flynn moved the Board accept both sets of minutes, seconded by Robert Schofield.

Sean	Hogan	Barnstable	Yes
Robert	Schofield	Bourne	Yes
Colin	Odell	Brewster	Yes
Brian	Miner	Chatham	Yes
Tom	McNellis	Eastham	Yes
Alan	Strahler	Edgartown	Yes
Matt	Patrick	Falmouth	Yes
Valerie	Bell	Harwich	Yes
Wayne	Taylor	Mashpee	Yes
Martin	Culik	Orleans	Yes
Bob	Higgins-Steele	Truro	Yes
Joyce	Flynn	Yarmouth	Yes

Motion carried in the affirmative (12-0-0)

CHAIRMAN'S REPORT:

1. Introduction of Pending Wellfleet Board Member, Suzanne Ryan-Ishkanian

Martin Culik introduced Suzanne Ryan-Ishkanian who will be the Wellfleet Board Member once approved by the town. He asked her to tell the Board about herself. Suzanne Ryan-Ishkanian stated that she has lived on the Cape for about 10 years and has lived in Wellfleet for six. She has a background in grant writing and that is how she came to be on the Energy and Climate Action Committee for the town of Wellfleet. She stated that Richard Elkin asked her to consider representing Wellfleet on the Compact Board.

2. Richard Elkin's Passing

Martin Culik stated that Richard Elkin passed away recently. He was the Wellfleet Board Member for many years. He was very involved not only with the Compact but also with the town of Wellfleet. Suzanne Ryan-Ishkanian stated that the Energy and Climate Action Committee is exploring having a plaque with his name on it at the transfer station solar array as he was instrumental with that project. His absence will be missed.

3. Bullets for March Board Member Updates to Select Board or Town Council

Martin Culik stated that last month we talked about Board Members providing Compact updates to their Select Board or Council. He stated that Jason Bertrand has written up information to share about Compact offerings for non-profits. Maggie Downey stated that the information will be sent to the Board after the meeting. It is under three minutes and can be presented during public comment.

UPDATE ON EVERSOURCE ELECTRIC SECTOR MODERNIZATION PLAN (ESMP), MARIEL MARCHAND:

Mariel Marchand reviewed the Update on Eversource Electric Sector Modernization Plan (DPU 24-10) PowerPoint.

Mariel Marchand stated that the 2022 Climate Act requires, among a number of other things, Electric Distribution Companies (EDCs) to prepare Electric Sector Modernization Plans (ESMP). The purpose of the ESMP is to proactively upgrade the distribution system to allow Massachusetts to meet its climate goals. She stated that the main objectives of the ESMP are around accommodating transportation and building electrification and enabling timely adoption of renewable energy and distributed energy resources. All while ensuring that we have a reliable grid as climate related impacts increase. She stated that the ESMP is to achieve these objectives, while minimizing impacts on ratepayers. She stated that along with requiring the EDCs to file ESMPs, the Climate Act also established the Grid Modernization Advisory Council (GMAC) that is led by the Department of Energy Resources (DOER). The GMAC includes several energy industry stakeholders. They were tasked with reviewing a draft of the ESMPs and providing feedback to both the EDCs and to the Department of Public Utilities (DPU) for their review. This process happened throughout the summer and fall and now we are on to the DPU proceeding.

Mariel Marchand stated that Eversource filed its ESMP with the DPU on January 29th and what they filed included a number of changes and additions from the draft that they submitted to the GMAC. Their ESMP still has three planning horizons. A 5 year, a ten year and then all the way up to the year 2050. She stated that her main takeaway is that the ESMP is pretty limited in terms of innovative solutions. It is relying on a lot of new investment and Eversource didn't come up with as many new ideas to meet our climate goals as the Compact would have hoped.

Mariel Marchand reviewed the DPU timeline. She stated that the EDCs filed the plan with the DPU on January 29th and on January 30th the petitions to intervene were due and discovery began. The Compact filed a petition to intervene, which was approved. The DPU has seven months from the date of filing to either approve the modification or reject the ESMPs. A DPU Order on the Eversource ESMP is due on August 29th. She stated that the Compact will be participating throughout the different stages of the DPU proceeding.

Mariel Marchand reviewed the concerns that were identified in the Compact's review of the ESMP. She stated that the new key concerns are Eversource's, and the EDCs as a whole, request to defer inclusion of some important topics that were required to be included in the ESMPs per the legislation. The Compact's main concern is with their request to defer rate redesign options, including time varying rates (TVR), and their request to defer alternative approaches to financing. She stated that the DPU did issue an Order approving the EDCs request to defer these topics, so the Compact will be focusing on addressing these topics to make sure they don't fall off the map. She stated that another concern is around the Community Engagement Stakeholder Advisory Group (CESAG). The GMAC requested that the CESAG fall under their umbrella. The EDCs in their filing with the DPU declined to accept that request. She stated that the Compact is concerned about what the focus of the group will be and what stakeholders will be included. She stated that we want to make sure that appropriate stakeholders are included and that the focus of the group is really on more than just getting new infrastructure.

Mariel Marchand reviewed the Compact's previous concern that the ESMP relies heavily on investments that are already approved or pending before the DPU. Specifically, that these investments are approved through the rate case or the grid modernization docket. She stated that there is a lot of investment in new infrastructure as opposed to using new innovative solutions like non-wire alternatives, market partnerships, and demand response to reduce demand during peak hours. She also expressed concern with the way that Eversource did its load forecasting. The methodology that they used is based on worst case scenario. She stated that they are looking at PV as potentially not being able to provide capacity as opposed to looking at storage as an asset that could come online and be dispatched during times of peak demand. She stated that they are viewing battery storage as something that is going to be charging and even charging during times of peak demand. Therefore, they aren't taking the best advantage of those resources.

Mariel Marchand reviewed the next steps. She stated that the Compact has filed three rounds of discovery in the ESMP docket. She stated there will be additional discovery as responses to our questions and questions from other parties come in. The Attorney General has been asking a number of questions that align well with ours. She stated that the Compact will be reading those responses and drafting more questions as needed. Eversource has been very timely and responsive to our discovery questions and other parties' discoveries, which has been very helpful with keeping the process moving. She stated that the Compact didn't identify a need to file testimony in this proceeding, but we will certainly be participating in the hearings and filing briefs. She stated that going back to those concerns that she outlined on the previous slide, in terms of our goals for participation, we'd really like to see expeditious and equitable implementation of TVR. Despite the fact that it's not going to be addressed and decided on in this docket, the Compact will be trying to advocate for some kind of regulatory certainty on when TVR will be addressed to make sure that it is ready to roll out when we do finally receive advanced meters.

Mariel Marchand stated that the Compact will be advocating for approval of the Cape Capital Improvement Plan (CIP) so that Distributed Generation (DG) can get interconnected on the Cape. She stated that the Compact is seeking to make sure that double poles are addressed in a timely fashion and finally, the Compact will be working to try to make sure that that CESAG is collaborative and includes input from both the GMAC and key stakeholders like the Compact.

Kevin Galligan stated that he would like to echo what Mariel Marchand said about how Eversource has been very responsive to the questions that we and other parties have asked, and it's been really positive from the standpoint of learning and understanding. He stated that he does think that the Order from the DPU narrowed the scope such that there are a number of things that will be deferred to either a future phase or proceeding.

Tom McNellis asked what the main implication for the Compact is with the delayed implementation of TVR. Mariel Marchand stated that hopefully TVR won't be delayed. She stated that she has been participating in the Advanced Metering Infrastructure (AMI) Stakeholder Working Group, which is where TVR is being discussed with the EDCs at a pretty granular level, making sure that their back-end systems are able to accommodate all of the data that comes in from these new meters. She stated that the Compact has been having good discussions on municipal aggregators being able to offer TVR and access that data. Kevin Galligan stated that the Cape and Vineyard will be the last meter upgrade to get the TVR. However, in a discovery that has come in recently, Eversource has confirmed that as soon as the TVR meters are in a customer community the products associated with that should be ready to go at the same time. So, they've put on the record, there should be no delay in offering associated services with TVR. David Anthony asked if the delay was because of the delay in delivering the meters themselves. Kevin Galligan stated that it is the way Eversource teed up their meter replacement schedule. They have tried to use a depreciation schedule as the guide. The Cape and Vineyard meters were updated several years ago, this was the last meter upgrade conducted by Eversource in its territory, and they were not AMI meters. As a result of this installation schedule, the Cape and Vineyard will be the last Eversource territory to receive AMI meters and TVR. Martin Culik asked if AMI meters are scheduled for next year. Mariel Marchand stated no, it will be starting in 2026 and ending in 2027.

Bill Doherty asked if Eversource is giving you any confidence as to whether or not there's been adequate testing to ensure that when they do this rollout it will be successful. Mariel Marchand stated that from what she has heard on the AMI stakeholder group, AMI has been successfully rolled out in a number of states at this point. She stated that they're still in the process of procuring those meters, but they also do plan to do a lot of testing when they do roll out the meters before implementing. She stated that she doesn't foresee there being that many issues. Kevin Galligan stated that in terms of how advanced these meters are, they are going to be able to not only read load information, both demand as well as usage, but they'll be able to know where voltage changes occur. He stated that Eversource is hoping to be able to adjust its system based upon knowing where there may be some advance warning about brownouts. He stated that he believes the meters are going to be very sophisticated but will keep an eye out for that.

Matt Patrick asked if the Cape specific concerns were getting the right amount of airtime. Kevin Galligan stated that approval of the CIPs is critical. The CIP dockets were opened when Eversource filed these proceedings back in April of 2022, and they are waiting for a DPU Order. He stated what's behind each CIP are distributed energy resource connection projects. He stated that in discovery the Compact has asked for an updated queue of projects that may have fallen out or those that are building and Eversource provided a spreadsheet that shows the queue of those that want to interconnect has only grown since Eversource originally filed the Cape CIP. He stated that the Cape CIP is critical because it advances distributed generation, and we are going to pound on that because otherwise there is no alternative.

Bob Higgins-Steele asked what are the undergrounding kind of questions that people are asking. Mariel Marchand noted that Kevin Galligan had dropped off the meeting and that he is leading the undergrounding efforts for the Compact. She stated that she will relay that question to him and can follow up. Matt Patrick asked how dependent TVR will be on the existing internet. Mariel Marchand stated that she believes the EDCs are

proposing to use a mesh wireless network but would need to get more information on that from Kevin Galligan as well.

2024 ENERGY EFFICIENCY OFFERING FOR NON-PROFITS, LINDSAY HENDERSON:

Lindsay Henderson reviewed the 2024 Non-Profit Offer PowerPoint.

Lindsay Henderson stated that all small business non-profits must have an energy assessment to be eligible for the non-profit offerings. The requirements are: 1) that the non-profit must own the building or have an eligible long-term lease; 2) must be a 501(c)3 or a house of worship; 3) in operation for at least 5 years; 4) must use less than 1.5 million annual kWh; and 5) the electric account is in the non-profit's name on a commercial electric rate. She stated there's an application and some documentation that is required by the nonprofit or the house of worship to submit to us in advance so that we can review it and provide approval status. The majority of them do get approved. She stated that the approval is sent over to RISE Engineering so that they can incorporate that into any proposals that they give to that non-profit.

Lindsay Henderson stated the enhanced incentives, up to 100% on certain measures, are only available to non-profits that heat with electric resistance, oil, or propane. Non-profits that heat with natural gas are not eligible for this offering. The enhanced incentive also includes up to 100% incentive for heat pumps when paired with weatherization, resulting from an energy assessment. Again, this does not apply to those with natural gas looking to switch to heat pumps.

Valerie Bell asked if there is a cap on the funding. Lindsay Henderson answered that there is no cap as of right now. Valerie Bell asked if National Grid is offering something like this for natural gas customers. Lindsay Henderson answered not this year, but maybe next year. Matt Patrick asked who is coordinating the proposals on behalf of the customer. Lindsay Henderson stated that RISE Engineering is coordinating proposals for the customer. Tom McNellis asked what is qualified as a long-term lease. Lindsay Henderson stated that there has to be a contract in place for multiple years.

PRESENTATION ON 2024 GEOTARGETED ENERGY EFFICIENCY OFFERING – OAK BLUFFS, STEPHEN MCCLOSKEY

Stephen McCloskey reviewed the 2024 Community Based Energy Efficiency Offer for Oak Bluffs PowerPoint.

Stephen McCloskey stated that this community-based offer came from an effort started by the Energy Efficiency Advisory Council Equity Working Group. They recommended the Program Administrators (PAs) develop this community-based offering for communities that meet the following criteria: 1) the community is an environmental justice community; 2) has a high percentage of renters; 3) has a high percentage of low and moderate income households; 4) has a large percentage of homes heated with oil, propane or electric resistance; 5) has a Community First Partnership; and 6) is a community that has a historically low participation rate in our energy efficiency programs.

Stephen McCloskey reviewed why Oak Bluffs was chosen. It was designated a Massachusetts Environmental Justice community, 28% of occupied units are renters, 40% of residents are low- and moderate-income, all homes heated with oil, propane, or electric resistance, they have a Community First Partnership with Vineyard Power and have historically low participation rates in energy efficiency programs.

Stephen McCloskey stated that the Compact offers two program tiers for income-verified customers. He stated that what we used to classify moderate income was 61 to 80% of the state median income (SMI) but now it will be SMI or area median income (AMI) depending on which benefits the customer the most. The Income Eligible program serves customers making less than 60% of SMI or AMI.

Stephen McCloskey stated this is an offer for single family properties which the program defines as one to four units. He stated that if a resident or customer's income falls within that moderate income range based on SMI or AMI, or if they are a renter, they can self-attest that their income qualifies as being within the range of 61-80% SMI/AMI. After self-attesting to their income, a customer would be eligible to receive 100% coverage for all recommended weatherization measures found during the energy assessment. They will also get 100% coverage for all weatherization barriers such as knob and tube wiring or vermiculite, via a turnkey delivery model. He stated that the one caveat is for the renters. The landlord or property owner will need to sign off on any of this work in order to move forward.

Stephen McCloskey stated that if a moderate-income resident or renter is looking to electrify or decarbonize their home, they can do so via turnkey delivery model. Customers will receive 100% coverage for any electrification barrier they may face, as well as 100% coverage for the installation of a whole home heat pump to replace existing fossil fuel heating system or electric resistance heating system. For this part of the program customers must provide documentation that their income falls within the 61-80% AMI/SMI category.

Stephen McCloskey stated that renters receive 100% coverage for weatherization measures and any pre weatherization barriers. Renters can also get 100% coverage for electrification barriers and for installation of a whole home heat pump to replace existing fossil fuel or electric resistance heating system. These measures will require the landlord's permission and the customer will need to complete an income verification application.

Maggie Downey stated that Oak Bluffs and Tisbury are our two designated communities for the 2025-2027 Energy Efficiency Plan. She stated that she and Stephen McCloskey presented to the Oak Bluffs Select Board the other night. She stated that the Compact is the first to roll this out. The other PAs will be rolling out this offering in select communities in the next several weeks. She stated that the Compact will be working with Vineyard Power on marketing and encouraging customers to participate.

Joyce Flynn asked what documents the Compact requires to verify household income. Stephen McCloskey stated that they can send in their taxes, W2s, employee verification letter, etc. He stated that it is based on the customer's gross annual income.

Brian Miner stated that the Compact has a target for this work, but who owns the target? Maggie Downey stated that the Compact is reporting to the Energy Efficiency Advisory Council Equity Working Group, which is where this initiative originated. She stated that we will have targets in the 2025-2027 Plan, but for this 2024 offering we do not have targets. Briana Kane stated the intent of rolling this out in 2024 is to establish targets and baselines for 2025-2027. Brian Miner asked how the Compact balances the impact of performance of these programs on the energy efficiency budget. Maggie Downey stated that it is a balancing act. She stated that we try to build our budgets from the bottom up, but because we are projecting forward, we don't control participation levels. She stated we look at all the data and feedback that staff gets from being in the field when they're developing their budget.

Martin Culik asked if staff had a potential number of units. Briana Kane stated that there are roughly 4,100 residential customers in Oak Bluffs She stated that you have to remove those that are not year rounders, those

that have prior participation, and those that would not be able to self-attest, so staff has a ballpark idea as to where the full scope is then it's how much and where do people want to move forward.

Matt Patrick stated there is a big concern about losing rental units. He asked if there is any concern about the future of these units and if so, is there anything that can be done about it. Maggie Downey stated that it's a big conversation. There is a clear acknowledgement that on a statewide level, renters have not participated in energy efficiency programs. She stated that it will be something we are monitoring in 2024. If a landlord sells after their rental has been upgraded, that is something that will influence the 2025-2027 Plan and how it will be implemented. She stated that there is just such a concern that the majority of the renters in the Commonwealth are not being served and are being left behind.

Martin Culik asked how we address the outcome that electric expenses increased significantly with heat pumps. Maggie Downey stated that if you are heating with electric resistance, oil or propane and move to heat pumps, your heating bill will decline. Valerie Bell stated that one of the concerns from a landlord point of view is that occasionally the rental agreement includes an additional monthly fee that includes utilities. She stated that in that case the renter doesn't care, but the landlord might.

UPDATE ON 2025-2027 ENERGY EFFICIENCY PLAN PROGRAM CHANGES, BRIANA KANE:

Briana Kane reviewed the 2025-2027 Energy Efficiency Plan Overview PowerPoint.

Briana Kane stated that the PAs are focusing on decarbonization, equity, and customer experience. She stated that as required under Massachusetts General Law, on March 1st the PAs will be receiving from the Secretary of the Executive Office of Energy and Environmental Affairs our greenhouse gas (GHG) emissions reduction goals. She stated that the PAs will use those values to refine the Plan, budget, and measure population. She stated that the PAs will be offering a decarbonization assessment, which is a huge focus in our residential program. It will expand on the energy assessment, guiding customers along their path to move forward with electrification opportunities. She stated that the PAs are also going to be offering turnkey services for select measures such as pre-weatherization barriers, weatherization, and heat pumps, with a focus on moderate income and small business.

Briana Kane stated that there is a statewide focus on community-based efforts and equitable program delivery for renters, low-moderate-income, and limited English influence customers. The goal is to enhance their journey through our energy efficiency process. She stated that the utility Program Administrators will be establishing a statewide call center. She stated that the Compact already has this type of service in place and we would continue to maintain our own internal call center. She stated that all-electric is a prerequisite for residential and commercial and industrial new construction, with some limited exceptions.

Briana Kane stated that the Plan will address using AMI or SMI to determine a customer's income eligibility for specific programs. She stated that customer income self-attestation is another new offering. Customers within the 61 to 80% AMI or SMI bracket, who self-attest to eligibility will receive no cost recommended weatherization offerings.

Briana Kane stated that moderate income qualified customers who choose the Turnkey Pathway would be eligible for no-cost weatherization, no-cost pre-weatherization barrier remediation, no-cost pre-electrification barrier remediation, and no-cost heat pump installations. She stated that customers who do not want to participate in the Turnkey Pathway would be eligible for no-cost weatherization through self-attestation, and enhanced Heat Pump offers after completing the income qualification process.

Briana Kane stated the residential retail heat pump projects will require pre-approval and pre verification. We want to make sure that the systems being proposed are qualified products, which gives a little bit more assurance to the customer.

Briana Kane stated there is a residential new construction passive house offering for single-family. She stated that there is also a proposal to include an embodied carbon reduction incentive. An adder that aligns with the current new buildings and major renovations pathway options, offering customers support for avoiding whole-life carbon emissions.

Briana Kane stated that the PAs are proposing within the statewide plan website improvements. She stated the PAs are looking to help customers with limited English proficiency on their energy efficiency journey, making sure that they have language access. The goal is to diversify the workforce to allow for translation and have contractors that are able to translate as well. Also, the PAs will continue to diversify our workforce through training and supplier diversity summits and additional grants. as the PAs are also always looking to leverage funds to make our energy efficiency program dollars go further.

Briana Kane stated that the PAs are currently in the process of working on budgets. Compact staff have been gathering information on program budget and savings by looking at prior program participation. She stated that proposed budgets and high-level bill impacts will be shared at the March Board Meeting, and the PAs will be filing a draft of the energy efficiency plan on April 1st.

Valerie Bell stated that a lot of people with oil heat have radiators and asked what happens when heat pumps are being installed in these homes. Briana Kane stated that the system would be disconnected, and the radiator component would not be removed.

UPDATE ON CLC WEBSITE

Jason Bertran stated that he has started the process of updating the Compact's website for 2024. He stated that over the past couple of weeks, he has been reaching out to agencies and getting quotes and plans together. He stated that depending on the final cost of the updates the Compact may need to go out for an RFP. He stated that we are looking for a new overall look and feel and design for the website. He stated that he thinks a lot of us who understand the programs kind of get caught up in how things are organized that might not make sense for the customer. He stated that by talking to the different agencies he believes that the website could be done by early 2025. He stated that the Compact will probably want to bring in outside people to make sure the experience makes sense before it is completed.

Jason Bertrand stated that he has been considering pre-design testing as well to see how people are currently navigating the website. This will allow us to see where people are getting lost going through pages, if they are finding what they need pretty quickly, or what pages people are being driven to or accessing most.

David Anthony joined the meeting at 2:50PM.

Nicola Blake joined the meeting at 2:56PM.

DISCUSSION AND POTENTIAL VOTE ON CONSUMER ADVOCACY WORKSHEET FOR MA DEPARTMENT OF PUBLIC UTILITIES (DPU) INQUIRY ON ENERGY AFFORDABILITY FOR RESIDENTIAL RATEPAYERS (DPU 24-15), AUDREY EIDELMAN KIERNAN, KO LAW:

Audrey Eidelman Kiernan stated that this is an investigation that the DPU opened up in early January 2024 into areas of energy affordability for residential customers. The DPU asked a series of questions for both the public and utilities to consider. She stated that the DPU is looking at improving programs that are currently offered to address energy affordability. The programs are the electric discount rate, arrearage management programs, or disconnection protections for customers. The DPU is looking to ensure maximum participation in those programs. She stated that the DPU is also looking at whether other programs are out there that might provide additional benefit to customers that don't currently exist in Massachusetts. For example, something called a percentage of income payment plan that other states currently offer.

Audrey Eidelman Kiernan stated that the Compact organized a virtual stakeholder session on February 6th with various organizations that are focused on the needs of low-income customers and solicited feedback on the DPU's questions. She stated that the scope of the DPU's questions also includes consideration of the role of energy efficiency, demand response, residential loan programs for solar PV and battery storage in the concept of energy affordability. The Compact is planning to file comments on March 1st that reflect the consensus feedback from the stakeholder organizations, as well as some additional thoughts from the Compact based on its role as an energy efficiency PA. She stated that those comments will address how energy affordability programs should be tied to energy efficiency program participation.

Audrey Eidelman Kiernan stated that the DPU requires the Compact to document when it spends energy efficiency budget dollars on consumer advocacy matters. A consumer advocacy worksheet was developed to address the Compact's cost allocations because the scope of the proceeding includes energy efficiency matters. She stated that what is proposed in this worksheet is to allocate the costs of the proceeding based on the subject matter of the service provided. Work on the energy efficiency related matters will be billed to the energy efficiency budget and then work on power supply related matters would be billed to the operating budget. She stated that presently there's no procedure documented by the DPU beyond this initial March 1st comment date, so we await next steps. There's a wide scope given the number of questions that were asked, and this could potentially spin off into other dockets. However, right now, the extent of what we know is in the notice that was included in the Board packet and the list of questions the DPU has asked. She stated that normally the Board takes a vote on the consumer advocacy worksheet itself and participation in the in the docket associated with the worksheet.

David Anthony asked whether all the organizations that participated in the Compact's stakeholder session would be identified in the comments. Maggie Downey stated that when the Compact submits its comments those who participated in the stakeholder session will be mentioned in a footnote. Martin Culik asked who had participated in the stakeholder session. Audrey Eidelman Kiernan stated that a few of them were the Cape Cod Commission, the Faith Communities Environmental Network, Representatives from Senator Moran's office, the town of Dennis, the Bourne Council on Aging, and members of the Equity Working Group of the Energy Efficiency Advisory Council. Maggie Downey stated that the stakeholder group came up with 10 high level recommendations.

Valerie Bell asked if they could highlight a couple of the recommendations. Audrey Eidelman Kiernan stated one of the biggest issues we heard was customers like the notion of one stop shopping. Their participation in these energy affordability programs should be streamlined. The process for participating in an energy affordability program, such as the discount rate, should be easy, not overly burdensome. She stated that when you get access to one income based or income eligible program, you should be able to be educated on all available to you so that you don't have to go from point A to point B to point C to try and participate in various programs. Maggie Downey stated that another recommendation is if there is an electrification heat rate

developed there should be two, a market rate and then an income eligible rate. She stated that there is also a suggestion for revising the utility disconnection rules for those on disability payments, those with infant children, etc. to make it more simplified. Audrey Eidelman Kiernan stated that another recommendation that is specific to Cape Cod and Martha's Vineyard is the income index that's used for income verification should be flexible to account for regional demographics, including adjusting for the high cost of living on Cape Cod and Martha's Vineyard.

Robert Schofield moved the Board vote to authorize the Compact's participation in D.P.U. 24-15, adopt the Consumer Advocacy Worksheet for D.P.U. 24-15 and allocate costs between the Compact's energy efficiency and operating budgets as set forth in the Consumer Advocacy Worksheet.

The Compact Administrator is authorized and directed to take all actions necessary or appropriate to implement this vote, and to execute and deliver all documents as may be necessary or appropriate to implement this vote. Seconded by David Anthony.

David	Anthony	Barnstable	Yes
Robert	Schofield	Bourne	Yes
Colin	Odell	Brewster	Yes
Brian	Miner	Chatham	Yes
Tom	McNellis	Eastham	Yes
Alan	Strahler	Edgartown	Yes
Matt	Patrick	Falmouth	Yes
Valerie	Bell	Harwich	Yes
Wayne	Taylor	Mashpee	Yes
Martin	Culik	Orleans	Yes
Bob	Higgins-Steele	Truro	Yes
Nicola	Blake	West Tisbury	Yes
Joyce	Flynn	Yarmouth	Yes

Motion carried in the affirmative (13-0-0)

Wayne Taylor left the meeting at 4:09PM.

ADMINISTRATOR'S REPORT:

1. OPEB Trust established by the Compact's Treasurer on 2/7/2024

Maggie Downey stated that on February 7th the OPEB Declaration of Trust documents were established. She stated that consistent with these documents, the Board is to be informed of the date the Trust was established. The Trust documents were signed by the Compact's Secretary, David Anthony. There is a 90-day waiting period before the Trust documents become effective. Therefore, the Trust will be effective May 8th unless the Board votes between now and then to disapprove the Trust.

2. Massachusetts Climate Leaders Award Ceremony

Maggie Downey stated that she attended the Massachusetts Climate Leaders Award Ceremony last month. She stated that Harborview Hotel in Edgartown, as well as Shaw's Supermarkets in Falmouth and Orleans were

recognized for their energy efficiency work, along with several other statewide organizations. She stated that it was a wonderful ceremony held at the State House with many local elected officials in attendance. Martin Culik stated that it is something the Compact should include in a press release highlighting the Compact. Maggie Downey stated that the Compact sent one out. She stated that she believes we also ran this in the Compact social media but will check with Jason Betrand.

3. Proposed date for March Board Meeting: March 27

Maggie Downey reminded the Board that the March board meeting will be on Wednesday the 27th. She will send out the calendar invites. She stated that after that we will return to holding the Board Meetings on the second Wednesday of the month.

ADJOURNMENT:

Motion to adjourn made at 4:42 PM moved by Robert Schofield, seconded by Valerie Bell.

David	Anthony	Barnstable	Yes
Robert	Schofield	Bourne	Yes
Colin	Odell	Brewster	Yes
Brian	Miner	Chatham	Yes
Tom	McNellis	Eastham	Yes
Alan	Strahler	Edgartown	Yes
Matt	Patrick	Falmouth	Yes
Valerie	Bell	Harwich	Yes
Martin	Culik	Orleans	Yes
Bob	Higgins-Steele	Truro	Yes
Nicola	Blake	West Tisbury	Yes
Joyce	Flynn	Yarmouth	Yes

Motion carried in the affirmative (12-0-0)

Respectfully submitted,

Melissa Allard

LIST OF DOCUMENTS AND EXHIBITS:

- Meeting Notice/Agenda
- January 24, 2024, Draft Open Session and Executive Session Meeting Minutes
- Update on Eversource Electric Sector Modernization Plan (DPU 24-10) PowerPoint
- 2024 Non-Profit Offer PowerPoint
- 2024 Community Based Energy Efficiency Offer for Oak Bluffs PowerPoint
- 2025-2027 Energy Efficiency Plan Overview PowerPoint
- D.P.U. 24-15 Consumer Advocacy Worksheet

Cape Light Compact – Non-profit Offerings

Good evening and thank you for the opportunity to speak with you about Cape Light Compact. Tonight, I want to share information about Cape Light Compact's enhanced incentives for non-profit buildings that heat with electric, oil or propane. We would appreciate your assistance in spreading the word about these energy efficiency programs.

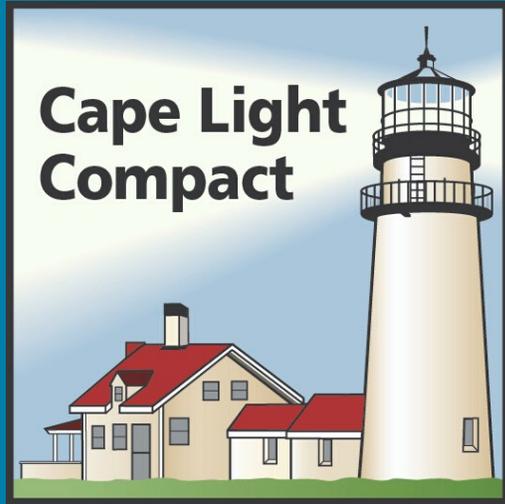
The Compact recognizes the important role non-profits play in providing critical services to residents of the Cape and Martha's Vineyard. The Compact also recognizes that most non-profits are focusing their funds on supporting their mission and may not be dedicating funding to making energy-efficiency upgrades to their facilities. This is why the Compact offers incentives covering up to 100% of the cost of recommended upgrades for qualified non-profit organizations. This includes enhanced incentives to decarbonize the building such as weatherization and heat pumps.

This year Cape Light Compact has modified the eligibility standards for their non-profit incentive program to be more inclusive. **If organizations were not eligible in the past, they may be eligible now.** To qualify, non-profits must:

- Receive an energy assessment.
- Own the building or have a long-term lease.
- Must be a 501(c)3 or house of worship and have been in operation for at least 5 years on Cape Cod and/or Martha's Vineyard
- Have an annual electric usage for all accounts on the site not exceeding 1.5 million kWh in the prior twelve months, and the active commercial electric account must be in the non-profit's name.

Again, these enhanced incentives are available only for buildings that heat with electric, oil, and propane. Projects for natural gas customers are managed by National Grid.

Non-profits who are interested in the program can download the application from capelightcompact.org/existingbuilding or call the Compact at 800-797-6699. Compact staff will determine if the non-profit is eligible and then reach out with next steps.



**Cape Light
Compact**

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2025-2027 Energy Efficiency Plan April Draft review

**Margaret Song, Strategy and Policy Manager
Briana Kane, Implementation Manager**

March 27, 2024



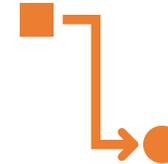
Changes to the Three-Year Energy Efficiency Process: Statutory and Regulatory



Establishes an earlier date for filing draft Statewide Energy Efficiency Plan – March 31st (will be filed April 1)



Advances the timeline for the Energy Efficiency Advisory Council (EEAC) review

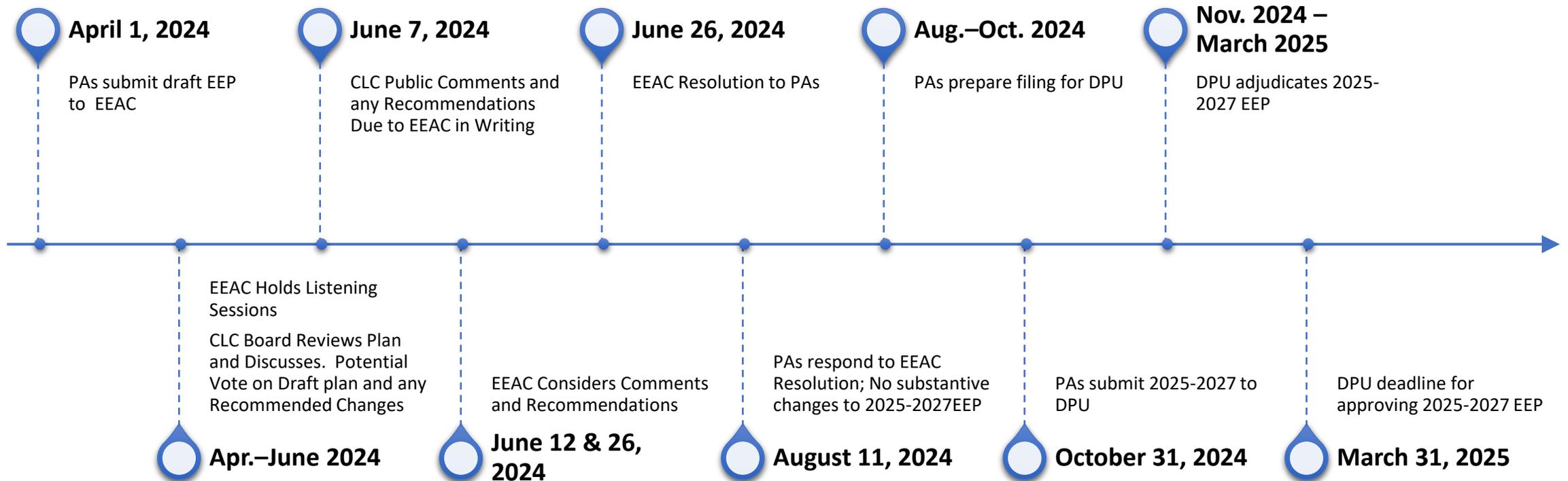


DPU limited the Compact/Program Administrators ability to make changes to Statewide Energy Efficiency Plan

Compact public comments and/or recommended changes to the Draft Statewide Plan have to be submitted through MA EEAC for their review and consideration



Timeline for Compact Review of Statewide 2025-2027 Energy Efficiency Plan (EEP)



Secretary of Executive Office of Environmental Affairs sets GHG goals on March 01, 2024

• 2022-2024

Statewide Budget and GHG (Plan and Actual)



• 2022-2024 v 2025-2027

Statewide Budget v GHG with Goals



Refer to the letter. Pursuant to the Goals, there is also a scenario 2 that asks for 2.2 million GHG.



Policy Goals for 2025-2027



Decarbonization



Equity



Customer experience



2025-2027 EEP Highlights:

New / Enhanced plan offerings based on policy goals



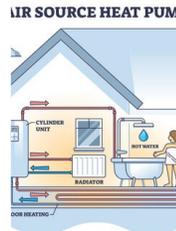
Turnkey offerings for select measures for a fully facilitated customer experience for Moderate Income (MI) and Small Business customers



Targeted enhanced community-based offers with a focus on equitable program delivery for residential and commercial renters/landlords, Low and MI customers, limited English influence



PAs will use both Area Median Income (AMI) and State Median Income (SMI) to determine a customer's eligibility



Statewide model to fund and deliver electrification projects



Changes to HEAT Loan

CLC's Community First Partner (CFP) for 2023-2024 has been Vineyard Power with an award of \$120,000. As well as an education grant of \$20,000.

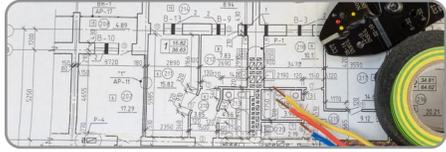
Faith Communities Environmental Network (FCEN) for 2023-2024 education grant is \$16,250.

The CFP budget for 2022-2024 is (2022, 2023 actuals and 2024 projected costs) \$297,047.35.

The draft CFP budget for 2025-2027 is \$812,523.



2025-2027 EEP Highlights continued



All-electric solutions in single-family and multifamily, and commercial new construction and renovations (some limited exceptions, emergency generation, labs, etc.)



C&I expansion of technical assistance and commissioning studies



Data and reporting



Enhanced call center services, CLC to continue to maintain its internal call center



Submitted a proposal to National Grid to provide customer service support for natural gas customers (a fee for service)



2025-2027 EEP Preview of the MI offering

MI qualified customers who choose the Turnkey Pathway would be eligible for:

no-cost weatherization*

no-cost pre-weatherization barrier remediation**

no-cost pre-electrification barrier remediation**

no-cost heat pump installations **

* = self-attestation ** = income qualification

MI customers who don't wish to participate in the Turnkey Pathway would be eligible for:

no-cost weatherization through self-attestation

enhanced Heat Pump offers after completing the income qualification process



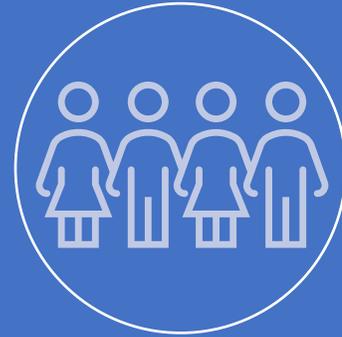
2025-2027 EEP Highlights continued



Website improvements



Enhance language access for non-English speakers and those with limited English proficiency



Implement strategies to strengthen and diversify the workforce

- Contractor trainings, supplier diversity summits, grants



Looking to leverage funds from IRA and other possible funding sources



2022-2024 Plan (for context) v. 2025-2027

	2022-2024 approved without CVEO (Dec 2021)	2022-2024 approved with CVEO (Jan 2023)	2022-2024 approved with MTM (March 2024)	2025-2027 draft budget (March 2024)
Residential	\$119,081,536	\$121,910,120	\$123,515,106	\$135,159,529
Income-Eligible	\$20,481,103	\$23,584,028	\$38,727,531	\$55,125,534
Commercial	\$56,915,139	\$56,915,139	\$43,322,721	\$31,166,066
Total	\$196,477,777	\$202,409,286	\$205,565,537	\$221,451,129
BCR (Total)	1.69	1.70	1.74	1.44
GHG (2030 metric tons)	30,067	30,512	29,838	28,967



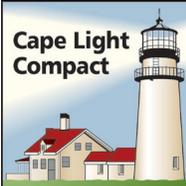
2025-2027 budget detail

	2025	2026	2027
Residential	\$45,080,073	\$44,714,563	\$45,364,894
Low Income	\$17,732,459	\$17,978,213	\$19,414,862
Commercial	\$9,406,092	\$10,341,839	\$11,418,135
Total	\$72,218,624	\$73,034,614	\$76,197,891



Energy Efficiency Surcharge (EES)

	Jan 1, 2022 approved	Jan 1, 2023 approved	July 1, 2023 approved	Jan 1, 2024 requested	Jan 1, 2024 approved	Jan 1, 2025 estimated	Jan 1, 2026 estimated	Jan 1, 2027 estimated
Residential	4.053	3.051	2.580	3.086	2.091	5.055	4.904	5.086
Income-Eligible	0.225	0.223						
Commercial	1.726	1.339	0.686	1.343	1.179	1.615	2.049	2.305



Illustrative Bill Impacts – R1

Rate R-1 Residential

1	Monthly	2024 In Effect			2025 Planned			Total Bill Impact	
		Delivery	Supplier	Total	Delivery	Supplier	Total	Change	% Change
2	kWh								
3	100	\$24.71	\$15.52	\$40.23	\$27.68	\$15.52	\$43.20	\$2.97	7.4%
4	200	\$39.42	\$31.04	\$70.46	\$45.35	\$31.04	\$76.39	\$5.93	8.4%
5	300	\$54.14	\$46.57	\$100.71	\$63.03	\$46.57	\$109.60	\$8.89	8.8%
6	400	\$68.85	\$62.09	\$130.94	\$80.70	\$62.09	\$142.79	\$11.85	9.0%
7	500	\$83.56	\$77.61	\$161.17	\$98.38	\$77.61	\$175.99	\$14.82	9.2%
8	600	\$98.27	\$93.13	\$191.40	\$116.06	\$93.13	\$209.19	\$17.79	9.3%
9	700	\$112.98	\$108.65	\$221.63	\$133.73	\$108.65	\$242.38	\$20.75	9.4%
10	800	\$127.70	\$124.18	\$251.88	\$151.41	\$124.18	\$275.59	\$23.71	9.4%
11	900	\$142.41	\$139.70	\$282.11	\$169.08	\$139.70	\$308.78	\$26.67	9.5%
12	1,000	\$157.12	\$155.22	\$312.34	\$186.76	\$155.22	\$341.98	\$29.64	9.5%
13	1,250	\$193.90	\$194.03	\$387.93	\$230.95	\$194.03	\$424.98	\$37.05	9.6%
14	1,500	\$230.68	\$232.83	\$463.51	\$275.14	\$232.83	\$507.97	\$44.46	9.6%
15	2,000	\$304.24	\$310.44	\$614.68	\$363.52	\$310.44	\$673.96	\$59.28	9.6%
16 Avg	530	\$87.97	\$82.27	\$170.24	\$103.68	\$82.27	\$185.95	\$15.71	9.2%



Illustrative Bill Impacts – R2

Rate R-2 Residential Assistance

1	Monthly	2024 In Effect			2025 Planned			Total Bill Impact	
		<u>Delivery</u>	<u>Supplier</u>	<u>Total</u>	<u>Delivery</u>	<u>Supplier</u>	<u>Total</u>	<u>Change</u>	<u>% Change</u>
2	<u>kWh</u>								
3	100	\$14.33	\$9.00	\$23.33	\$16.05	\$9.00	\$25.05	\$1.72	7.4%
4	200	\$22.87	\$18.01	\$40.88	\$26.30	\$18.01	\$44.31	\$3.43	8.4%
5	300	\$31.40	\$27.01	\$58.41	\$36.56	\$27.01	\$63.57	\$5.16	8.8%
6	400	\$39.93	\$36.01	\$75.94	\$46.81	\$36.01	\$82.82	\$6.88	9.1%
7	500	\$48.46	\$45.01	\$93.47	\$57.06	\$45.01	\$102.07	\$8.60	9.2%
8	600	\$57.00	\$54.02	\$111.02	\$67.31	\$54.02	\$121.33	\$10.31	9.3%
9	700	\$65.53	\$63.02	\$128.55	\$77.56	\$63.02	\$140.58	\$12.03	9.4%
10	800	\$74.06	\$72.02	\$146.08	\$87.82	\$72.02	\$159.84	\$13.76	9.4%
11	900	\$82.60	\$81.02	\$163.62	\$98.07	\$81.02	\$179.09	\$15.47	9.5%
12	1,000	\$91.13	\$90.03	\$181.16	\$108.32	\$90.03	\$198.35	\$17.19	9.5%
13	1,250	\$112.46	\$112.53	\$224.99	\$133.95	\$112.53	\$246.48	\$21.49	9.6%
14	1,500	\$133.79	\$135.04	\$268.83	\$159.58	\$135.04	\$294.62	\$25.79	9.6%
15	2,000	\$176.46	\$180.06	\$356.52	\$210.84	\$180.06	\$390.90	\$34.38	9.6%
16 Avg	475	\$46.33	\$42.76	\$89.09	\$54.50	\$42.76	\$97.26	\$8.17	9.2%



Illustrative Bill Impacts – small C&I

Rate G-1 Small General Service

1	Monthly	2024 In Effect			2025 Planned			Total Bill Impact	
		Delivery	Supplier	Total	Delivery	Supplier	Total	Change	% Change
2	<u>kWh</u>								
3	5	\$15.50	\$0.77	\$16.27	\$15.52	\$0.77	\$16.29	\$0.02	0.1%
4	30	\$18.02	\$4.62	\$22.64	\$18.15	\$4.62	\$22.77	\$0.13	0.6%
5	80	\$23.04	\$12.33	\$35.37	\$23.39	\$12.33	\$35.72	\$0.35	1.0%
6	150	\$30.08	\$23.12	\$53.20	\$30.74	\$23.12	\$53.86	\$0.66	1.2%
7	275	\$42.65	\$42.39	\$85.04	\$43.85	\$42.39	\$86.24	\$1.20	1.4%
8	500	\$65.28	\$77.08	\$142.36	\$67.46	\$77.08	\$144.54	\$2.18	1.5%
9	750	\$90.42	\$115.62	\$206.04	\$93.69	\$115.62	\$209.31	\$3.27	1.6%
10	1,250	\$140.70	\$192.70	\$333.40	\$146.15	\$192.70	\$338.85	\$5.45	1.6%
11	2,500	\$266.40	\$385.40	\$651.80	\$277.30	\$385.40	\$662.70	\$10.90	1.7%
12	10,000	\$1,020.60	\$1,541.60	\$2,562.20	\$1,064.20	\$1,541.60	\$2,605.80	\$43.60	1.7%
13 Avg	1,650	\$180.92	\$254.36	\$435.28	\$188.12	\$254.36	\$442.48	\$7.20	1.7%



Next Steps

April 1st

- Compact Board receives 2025-2027 Energy Efficiency Plan (Plan) and begins its review of Plan

April 10th

- Compact Board discusses Plan
- Questions for staff
- Begins to formulate comments/questions on Plan

May 8th

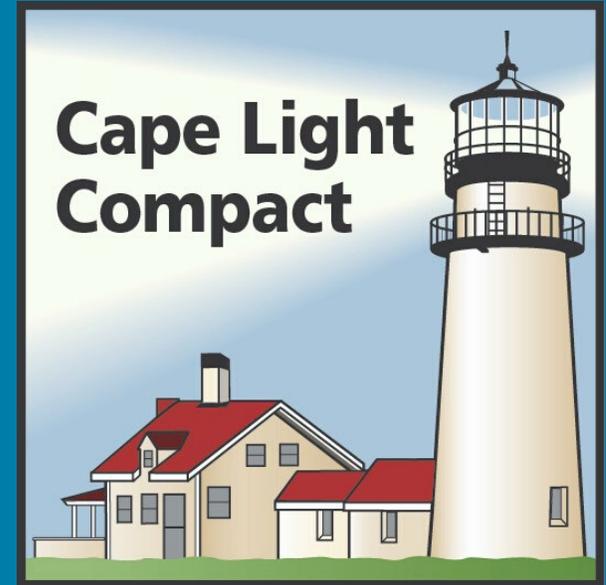
- Compact Board discusses Plan
- Questions for staff
- Begins to formulate comments/questions on Plan

June 5th

- Compact Board meeting
- Finalize any comments for MA EEAC and potential vote on Plan



Questions?



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RURAL UTILITIES SERVICE (RUS) RURAL ENERGY SAVINGS PROGRAM (RESP)

CHRONOLOGY

- ▶ December 2020 Compact submits Loan Application
- ▶ August 2023 Compact receives Loan Commitment Letter
- ▶ March 2024 Compact receives draft Loan Documents from RUS
- ▶ April 30, 2024 Current Loan Closing Date

KEY TERMS

- ▶ Purpose of RESP is to provide qualified applicants with zero-percent loans to develop or expand energy efficiency financing programs for their members.

- ▶ Loan terms offered by RUS:
 - ▶ Amount of Loan: \$4,900,000
 - ▶ Interest Rate: Zero percent
 - ▶ Use of Loan Proceeds: To make loans to qualified consumers to implement energy efficiency measures.
 - ▶ Customer Loans: The Compact can re-lend the loan proceeds at up to 5 percent interest to program participants.

KEY LOAN DOCUMENTS

- ▶ On March 4, the Compact received the following draft documents from RUS:
 1. Loan Contract
 2. Schedule 1 (to Loan Contract)
 3. Note
 4. Security Agreement and Financing Statement
 5. Deposit Account Control Agreement for Energy Efficiency Account
 6. Deposit Account Control Agreement for Loan Funds Account
 7. Borrower's Legal Opinion
 8. Secretary's Certificate (with Board resolutions)
- RUS is also requiring the Compact to obtain a Letter of Credit (LOC) from Cape Cod Five (CC5) to secure the loan.
- The LOC must be in the amount of 50% of outstanding balance of the RUS loan.
- CC5 is requiring security for the LOC.

REQUIRED BOARD VOTES FOR LOAN

- ▶ At its April 10, 2024 Board meeting, the Board will be asked to vote on certain resolutions required in connection with the RUS loan.
- ▶ Among other things, the resolutions will authorize the JPE Administrator to execute the loan documents and perform the actions necessary to implement them.
- ▶ There will also be a resolution related to the LOC.
- ▶ A Board vote will be taken to clarify/amend the term of the current Joint Powers Agreement to clearly state that it expires in 2046 as the RUS Note runs through 2044.

PROGRAM ROLLOUT

- ▶ This program will complement the Compact's activities as a Program Administrator of Mass Save® but it is funded and implemented independent of the Compact's energy efficiency activities and the 2025-2027 Three-Year Plan.
- ▶ Currently, the Compact plans to announce the program during the summer and market the program in the fall of 2024.
- ▶ The Compact and CC5 will develop the customer loan documents and program participation documents during the summer.
- ▶ The Compact hopes to request the first loan disbursement before Labor Day.

MORE INFORMATION

- ▶ November 4, 2020 CLC PowerPoint presentation (sent March 7, 2024 by email)
- ▶ https://www.rd.usda.gov/sites/default/files/fact-sheet/508_RD_FS_RUS_RuralEnergySavings.pdf
- ▶ <https://www.eesi.org/Rural-Energy-Savings-Program>

QUESTIONS

► Contact:

Erin M. O'Toole, Esq.

KO Law, P.C.

eotoole@kolawpc.com

617.584.8338





Your Trusted, Local Energy Resource

Renewable Portfolio Standard Application: Certification for CVEO

Cape Light Compact Governing Board
March 27, 2024

Background

- Cape and Vineyard Electrification Offering (CVEO) Order requires the Compact to register PV systems for the Class I Renewable Portfolio Standard (RPS)
- Systems will generate renewable energy credits (RECs)
- Revenue from the sale of RECs will be returned to the Energy Efficiency program
- Revenue will depend on system production and REC prices
- RPS Class I application (Statement of Qualification Application) submitted to MA Department of Energy Resources



Board Vote

- RPS application requires Authorized Representative for the PV systems to submit a certification that demonstrates their authority to submit the application on behalf of the Compact
- This can be provided in the form of:

“a board of directors vote from the aggregating entity granting authority to the Authorized Representative to execute the Statement of Qualification Application”



**Agenda Action Request
Cape Light Compact
Meeting Date: 3/27/24**



- Aquinnah
- Barnstable
- Bourne
- Brewster
- Chatham
- Chilmark
- Dennis
- Dukes County
- Eastham
- Edgartown
- Falmouth
- Harwich
- Mashpee
- Oak Bluffs
- Orleans
- Provincetown
- Sandwich
- Tisbury
- Truro
- Wellfleet
- West Tisbury
- Yarmouth

Renewable Portfolio Standard (RPS) Class I Statement of Qualification Application

REQUESTED BY: *Marisel Marchand*

Proposed Motion(s)

I move the Board vote to authorize Compact staff to complete and submit the RPS Class I Statement of Qualification Application to the Massachusetts Department of Energy Resources.

The Compact Administrator is authorized and directed to take all actions necessary or appropriate to implement this vote, and to execute and deliver all documents as may be necessary or appropriate to implement this vote.

Additional Information

Consistent with the MA Department of Public Utilities Order approving the Cape & Vineyard Electrification Offering (CVEO), the Compact will register participating CVEO PV systems for the Class I RPS.

See attached presentation.

Record of Board Action

Motion by:	Second by:	# Aye	# Nay	# Abstain	Disposition

Name of the Generation Unit

SECTION IV. CERTIFICATION

Provide documentation that demonstrates the authority of the Authorized Representative indicated in section I.3 by following the appropriate instructions below.

Aggregation with Multiple Owners

If seeking qualification for an Aggregation of units that have different owners, the Authorized Representative shall provide either:

- a. a board of directors vote from the aggregating entity granting authority to the Authorized Representative to execute the Statement of Qualification Application; or*
- b. a certification from the Corporate Clerk, Secretary, or an individual otherwise authorized to legally bind the organization acting as the aggregator that the Authorized Representative is authorized to execute the Statement of Qualification Application, or is otherwise authorized to legally bind the corporation in like matters.*

Corporations

If the Owner or Operator is a corporation, the Authorized Representative shall provide either:

- a. a board of directors vote granting authority to the Authorized Representative to execute the Statement of Qualification Application; or*
- b. a certification from the Corporate Clerk or Secretary of the Corporation that the Authorized Representative is authorized to execute the Statement of Qualification Application, or is otherwise authorized to legally bind the corporation in like matters.*

Individuals

If the Owner or Operator is a sole proprietorship or an individual, that proprietor or individual shall complete and mail APPENDIX H to DOER's offices as instructed.

Other Non-Corporate Entities

(Proprietorships, Partnerships, Cooperatives, Government Agencies, etc.)

If the Owner or Operator is not an individual or a corporation, it shall complete and mail APPENDIX I to DOER's offices as instructed.

I hereby certify, under pains and penalties of perjury, that I have personally examined and am familiar with the information submitted herein, and, based upon my inquiry of those individuals immediately responsible for obtaining the information, I believe that the information is true, accurate, and complete. I am aware that there are significant penalties, both civil and criminal, for submitting false information, including possible fines and de-certification of a Statement of Qualification. My signature below certifies all information submitted in this Statement of Qualification Application. The Statement of Qualification Application includes the application form and all required appendices and attachments.

Signature of Authorized Representative

Date



Please verify that this form contains the name of the Authorized Representative, who will then have the form SIGNED and NOTARIZED in the presence of a Notary Public. MAIL the actual notarized form to the Department of Energy Resources.

I, Margaret Downey as the Authorized Representative of the Owner or Operator of the Generation Unit named in the Statement of Qualification Application to which this Certification is appended, hereby certify under pains and penalties of perjury, that I have personally examined and am familiar with the information submitted herein, and, based upon my inquiry of those individuals immediately responsible for obtaining the information, I believe that the information is true, accurate, and complete. I am aware that there are significant penalties, both civil and criminal, for submitting false information, including possible fines and de-certification of a Statement of Qualification. My signature below certifies all information submitted in this Statement of Qualification Application. The Statement of Qualification Application includes the application form and all required appendices and attachments.

Cape Light Compact JPE / Administrator
Entity/Title of the Authorized Representative

Signature of Authorized Representative

2/28/2024
Date

[TO BE COMPLETED BY NOTARY]

I, _____ as a notary public, certify that I witnessed the signature of the above named _____, and that said individual verified his or her identity to me on this date: _____, 20__.

Notary's Signature

My commission expires on: _____

NOTARY SEAL HERE:



ID: 26007
Status: In Process
Entity: Cape Light Compact JPE

Applicant and Contact Person	
Name of the entity that is applying for a Statement of Qualification for the Generation Unit	Cape Light Compact JPE
Contact person's first name	Mariel
Contact person's last name	Marchand
Title	Power Supply Planner
Email address	mariel.marchand@capelightcompact.org
Telephone number	(508) 375-6623
Mobile phone number	
Fax	
Street Address 1	261 Whites Path
Street Address 2	Suite 4
City	Yarmouth
State/Province	MA
Zip Code	02664
Applying entity's webpage URL, if any	

Authorized Representative	
Name of the entity at which the Authorized Representative is employed or otherwise affiliated	Cape Light Compact JPE
Authorized Representative's first name	Margaret
Authorized Representative's last name	Downey
Title	Administrator
Email address	mdowney@capelightcompact.org
Telephone number	(508) 375-6636
Mobile phone number	
Fax	



ID: 26007
Status: In Process
Entity: Cape Light Compact JPE

Street Address 1	261 Whites Path
Street Address 2	Suite 4
City	Yarmouth
State/Province	MA
Zip Code	02664
This entity's webpage URL, if any	

Generation Unit Owner	
Name of the entity that owns the Generation Unit	Homeowner
Contact person's first name	Marylou Michelle
Contact person's last name	Davis
Title	Ms.
Email address	michelle.davis0525@gmail.com
Telephone number	(508) 246-6134
Mobile phone number	
Fax	
Street Address 1	11 Konuhasset Way
Street Address 2	
City	Chatham
State/Province	MA
Zip Code	02633
Owning entity's webpage URL, if any	
Organization type	

Generation Unit Operator	
Same As	Generation Unit Owner



ID: 26007
Status: In Process
Entity: Cape Light Compact JPE

Generation Unit Information	
Identification of the Generation Unit or Aggregation	CVEO
NEPOOL GIS Generation Unit Asset ID#:	NON193578
NEPOOL GIS Plant – Unit Name:	CVEO1 - 11 Konuhasset Way
NEPOOL GIS Account Holder:	Cape Light Compact JPE
Nameplate Capacity of the Generation Unit:	0.0122
Generation Unit's Renewable Fuel, Energy Resource, or Technology	Solar Photovoltaic
Commercial Operation Date of the Unit:	2/6/2024
Was the Unit's Power Conversion Technology used on or before December 31, 1997?	This technology was not used anywhere before December 31, 1997
Control Area Location of the Generation Unit	In the ISO-NE Control Area
Address1:	11 Konuhasset Way
Address2:	
City:	Chatham
State/Province:	MA
Zipcode:	02633
Navigational coordinates	
Is this location a site where electricity was generated on or before December 31, 1997?	No
How will the electricity output of the Unit be reported to the NEPOOL GIS?	By an Independent Verifier (a.k.a. Third Party Meter Reader) for "NON" Units at the NEPOOL GIS.
Does this Application cover more than one Generation Unit in a single state in ISO-NE, all of which Units share the same fuel, technology, or resource, and all of which are either located behind the meter of retail electricity customers or are Off-grid Generation Units?	Yes



ID: 26007
Status: In Process
Entity: Cape Light Compact JPE

Is the Unit or Aggregation applying for the Solar Carve-Out (at II.2), or is the Unit registered with the local utility as a Net Metering Facility pursuant to 220 CMR 18.00?	No
---	----

Certification	
Generation Unit type	Aggregation with Multiple Owners
The Owner or Operator that will certify	Generation Unit Operator

Appendix A	
Is any amount of the total generation capacity of the Generation Unit for which this Application requests qualification as RPS Class I Renewable Generation already committed to any Control Area other than the ISO-NE Control Area?	No
Is the amount of the total generation capacity of the Generation Unit for which this Application requests qualification as RPS Class I Renewable Generation already participating in the ISO New England Forward Capacity Market?	No, No intention to participate in the FCM -- this is a small PV system being registered with the utility as a QF because of a DPU order related to Cape Light Compact's CVEO pilot program

Appendix D	
Each Generation Unit in the Aggregation is located in the same state and does or will use the same fuel, energy resource or technology type as all other Units in the Aggregation, which is the one indicated in the body of this Application.	True



ID: 26007
Status: In Process
Entity: Cape Light
Compact JPE

<p>Each of the Owners or Operators of Generation Units within the Aggregation has or will enter into a written agreement with a person or entity that serves as the Authorized Agent for the Aggregation in all dealings with the Department and with the NEPOOL GIS, and such agreement must include procedures by which the electrical energy output of each Unit shall be monitored and reported to the NEPOOL GIS by an Independent Verifier (a.k.a. Third Party Meter Reader), pursuant to the provisions in 225 CMR 14.05(1)(c) and/or 14.05(6)(d).</p>	<p>True</p>
<p>As the Authorized Agent of the Aggregation, I shall provide to the Department updates at appropriate intervals, but, at a minimum, an update due at the Department no later than June 1 of each year. Such updates shall include notice of any additions, deletions, or capacity changes from prior lists.</p>	<p>True</p>

Appendix E	
Name of the entity acting as Independent Verifier	PowerDash
Contact person's first name	Stephen
Contact person's last name	Lapointe
Title	President
Email address	stephen@powerdash.com
Telephone number	(888) 797-3274
Mobile phone number	
Fax	
Street Address 1	50 Church St
Street Address 2	



ID: 26007
Status: In Process
Entity: Cape Light
Compact JPE

City	Cambridge
State/Province	MA
Zip Code	02138



The Commonwealth of Massachusetts
Executive Office of Energy and Environmental Affairs
100 Cambridge Street, Suite 900
Boston, MA 02114

Maura T. Healey
GOVERNOR

Kimberley Driscoll
LIEUTENANT GOVERNOR

Rebecca L. Tepper
SECRETARY

Tel: (617) 626-1000
Fax: (617) 626-1081
<http://www.mass.gov/eea>

March 1, 2024

RE: Greenhouse Gas Emissions Reduction Requirement for Mass Save

Dear Mass Save Program Administrators,

Pursuant to G.L. 21N, §3B, I hereby establish the following goals for the Mass Save[®] 2025-2027 Energy Efficiency Plans (2025-2027 Plans), which you are currently in the process of preparing with the Energy Efficiency Advisory Council (EEAC), pursuant to G.L. c. 25, § 21(c), and which you must submit by October 31, 2024, to the Department of Public Utilities (DPU) for a decision, pursuant to G.L. c. 25, § 21(d).

In 2021, [An Act Creating A Next-Generation Roadmap For Massachusetts Climate Policy](#) (the Climate Act) built upon the framework established in the Administration's [2050 Decarbonization Roadmap \(2050 Roadmap\)](#) and [2030 Interim Clean Energy and Climate Plan \(2030 Interim CECP\)](#) and allows the Commonwealth to pursue ambitious emissions reduction goals in a cost-effective and equitable manner, while creating jobs and opportunities for economic development throughout Massachusetts. The Climate Act established the requirement of a Mass Save goal in G.L. c. 21N, expressed in carbon dioxide equivalent, every three years for the succeeding Mass Save Plans' necessary contribution to meeting each statewide greenhouse gas limit (GHG) and sublimit.

Greenhouse Gas Emissions Reduction Goals

The Massachusetts Clean Energy and Climate Plan for 2025 and 2030 (2025/2030 CECP) recognizes of importance of the Mass Save plans in meeting the Residential and Commercial & Industrial building sectors sublimit reductions. The CECP also notes that other measures or programs could contribute to emissions reductions in the building sector. The Healey-Driscoll Administration recognizes that it is neither prudent nor possible to rely on a single program to meet the required emissions reductions. Accordingly, we are employing a suite of complementary levers to drive emissions reductions in the buildings sector. These include, but are not limited to, the stretch and specialized energy codes promulgated in 2022, the clean heat standard that is under development, decarbonization grants and incentives in the housing bond bill, the newly launched Massachusetts Community Climate Bank, Municipal Light Plants' heat pump loan, improved appliance standards, and increased federal funds, including the significant rebates and incentives available under the Inflation Reduction Act. Balancing the deployment of

these various programs requires consideration of cost-effectiveness, ratepayer affordability, and the Commonwealth's equity priorities.

There is no doubt, however, that within this multifaceted approach, our Mass Save programs are a key policy driver to meeting our GHG emissions reduction requirements and the programs must reflect this imperative. Toward that end, I direct the Program Administrators to model two scenarios as set forth below.

Scenario 1: Table 1 sets the statewide electric and natural gas goal for the 2025-2027 Plans at a total of 1 million metric tons with an assumed budget of less than 5 billion dollars. This goal represents the GHG emissions reductions to be achieved with energy efficiency measures and programs implemented in 2025-2027, and expressed as annual cumulative metric tons of reductions in years 2025 and 2030 to align with the Commonwealth's GHG limits and sublimits.¹ The specific assumptions and methodology are provided in Appendix 1, attached hereto.

Table 1²

	Joint Statewide Energy Efficiency Plan	Joint Statewide Gas Efficiency Plan
2030 Annual Cumulative GHG Emission Reductions (tons)	625,000	375,000

As the Climate Act requires both economy-wide and sector limits, I recommend that the plans include emissions reductions in the following individual sectors:

Table 2

2025-2027 Plans	Residential and Income Eligible Electric Energy Efficiency	Residential and Income Eligible Gas Efficiency	Commercial and Industrial Electric Energy Efficiency	Commercial and Industrial Gas Efficiency
2025 Annual Cumulative Emissions Reduction (tons)	125,000	89,000	63,000	14,000
2030 Annual Cumulative Emissions Reduction (tons)	415,000	325,000	210,000	50,000

Scenario 2: To further examine the investment required to meet the CECP requirements, I direct the Program Administrators to model achievement of 2.2 million metric tons of emission reductions by 2030, using the same relative sector allocations as guidance and maintaining a

¹ It should be noted that the Mass Save programs help to reduce emissions across multiple sub-limits, in addition to significant contributions to the building thermal sector sub-limit.

² There is some flexibility in the allocation of the emission reductions by sector to facilitate the program administrators' achievement of the overall goal and optimizing opportunities in the delivery of the programs.

similar ratio of equity/market rate investment.³ This analysis will support a decision on securing more resources for the implementation of energy efficiency and decarbonization programs in the Commonwealth.

Priorities

Meeting the Climate Act's 2050 Net Zero limit and 2030 limit of at least 50% reduction from 1990 will require significant investment and an increase in the scope and scale of building retrofits, through a focus on envelope improvements and efficient electrification. Consistent with the EEAC Resolution of December 20, 2023,⁴ I expect the Mass Save Program Administrators to achieve the GHG goals established above through:

- Continued prioritization of measures to decarbonize buildings that are consistent with the 2050 Roadmap and 2025 & 2030 CECP, such as insulation and heat pumps;
 - Significantly increasing the number of residential and commercial buildings retrofitted with heat pumps and weatherized each year, with a focus on buildings served by delivered fuels, to set the Commonwealth on a path to installing efficient electric space heating in 500,000 homes and 300-400 million square feet of commercial buildings this decade;
 - Development of a green schools decarbonization initiative, in coordination with the Department of Energy Resources (DOER) and other state agencies, that supports the decarbonization of schools in disadvantaged communities through commercial sector investment;
- Further reflection of the Commonwealth's equity priorities, providing a greater emphasis on intergenerational equity and facilitating the plan's increased focus on decarbonization and the equitable delivery of programs;
 - Equitable program investments that ensure weatherization and electrification of low-moderate income homes and rental units through focused efforts in communities that have had low program participation and high rental populations, increased support of Community First Partners and the provision of end-to-end language services;
- Adopting a plan framework to support market transformation actions to further the long-term achievement of increasing residential heat pump installations and the electrification of commercial building space;
- Utilizing a 1.5% discount rate for the social cost of greenhouse gases, as published in the 2024 Avoided Energy Supply Cost study.
- Continued enhancement of the customer journey by adopting programmatic designs that support customer understanding and the adoption of clean energy technologies, including simplified income qualifications, technical assistance and turnkey services; and
- Significantly increasing workforce development investments through and in coordination with the Massachusetts Clean Energy Center, to increase diversity and expand the workforce necessary to achieve our GHG goals and provide economic opportunities.

³ The modeling of the 2.2 million ton reduction should utilize all cost reduction strategies, such as bulk purchasing, outside funding and the possibility of streamlined administration of the program and refrain from the use of linearly increasing program costs, without justification.

⁴ <https://ma-eeac.org/wp-content/uploads/EEAC-Resolution-and-Priorities-for-2025-2027-Plan-12.20.23.pdf>

Conclusion

As set forth above, the Mass Save 2025-2027 Energy Efficiency Plans filed with the Department of Public Utilities in October of this year must be designed to realize the GHG goal set forth above and should focus on programs that accelerate market transformation needed to achieve Net Zero in 2050. The Plans should reflect the GHG reduction goals set forth above, prioritize equity in program investment, and include a performance incentive mechanism that ensures that the electric and gas utilities are incentivized to achieve these goals, invest in market transformation and advance equitable actions.

I look forward to the collaborative work of the Program Administrators and the Energy Efficiency Advisory Council as they transform Massachusetts' nation leading energy efficiency efforts into comprehensive decarbonization programs that will deliver GHG emission reductions to further the Commonwealth's climate mandates.

Sincerely,

A handwritten signature in black ink, appearing to read 'R. Tepper', with a long horizontal stroke extending to the right.

Rebecca Tepper
Secretary of Energy and Environmental Affairs

Attachments

APPENDIX 1 ASSUMPTIONS AND METHODOLOGY

Greenhouse Gas Emissions Reduction Requirement for Mass Save® - Methodology

This section is largely consistent with the Secretary's letter for the 2022-2024 plan with alterations due to new information.

Clean Energy & Climate Plan for 2025 & 2030

The primary actions in the Clean Energy & Climate Plan (CECP) for 2025 & 2030 relevant to the Mass Save® plans¹¹ include retirement and replacement of space heating and cooling equipment, domestic hot water equipment, and key components that comprise a building's envelope, such as windows and insulation. These actions directly contribute to the Building Sector sublimit, although other actions within the Mass Save plan may impact other sublimits. Since Mass Save only covers the service territories of the Commonwealth's investor-owned gas and electric utilities, for the purposes of this computation, a portion of the changes to statewide energy savings (reflecting an estimate of built square feet serviced by municipal-owned utilities) are excluded from the Mass Save GHG reduction requirement. The resulting annual energy savings from each of the three years are summed to produce a cumulative annual energy savings representing the impact of all relevant measures installed from January 1, 2025 through December 31, 2027. Since the actions described in the CECP reflect long-lived building components, no degradation by 2030 is assumed.

In the CECP, cumulative annual energy consumption is multiplied by the emission factors noted below to arrive at the cumulative annual GHG emission reduction that the 2025–2027 Mass Save plans should contribute to in order to align with the reductions specified in the CECP.

Because the emissions limits and sublimits specified in M.G.L. Ch. 21(N) reflect emissions in 2025 and 2030, separate quantifications of GHG emission reductions are estimated, anticipating future deployment of non-emitting electricity resources.

Mass Save Plans by Fuels

The Mass Save® programs are established every three years and require two joint statewide plans; an energy efficiency plan funded through electric ratepayers, and a gas efficiency plan funded through gas ratepayers. The joint statewide energy efficiency plan includes electric, heating oil, and propane energy efficiency measures, including fuel switching from delivered fuels to electricity and active demand management programs. The joint statewide gas efficiency plan includes measures that apply to natural gas usage. The net change in use of these fuels (electricity, gas, heating oil, and propane) is the source of GHG emissions reductions achieved through the Mass Save program. In 2022 "An Act Driving Clean Energy and Offshore Wind" disallowed the Mass Save program from incentivizing most fossil fuel measures with some exceptions. This change was well aligned with Commonwealth policy, however, does limit fossil fuel savings through the program in the short term.

Sectors

The budgeting and implementation of these two statewide plans is conducted on a sector basis, with funding provided by residential ratepayers for residential and income-eligible programs, and by commercial ratepayers for commercial and industrial programs.

Measures

The Mass Save plans are implemented through investments that result in a reduction and/or shift in fuel or energy use in buildings over time. Measures are assessed for cost-effectiveness based on their energy and emissions savings utilizing best known information including the Social Cost of Carbon. For the 2025-2027 there is agreement that the Mass Save program should use the Social Cost of Carbon at a 1.5% social discount rate. These fuel-use and energy-saving quantities are calculated in the benefit-cost models during the development of each of the three-year plans. The plans include a budget and target energy-savings level for each program, initiative, and measure to be implemented over the three-year term. Each measure also has an expected

measure life, calculated based on independent monitoring and evaluation studies. The “measure life” is a forecast of the average expected time that a measure is predicted to perform above and beyond what would otherwise have occurred absent the Mass Save program. These energy savings by fuel and the evaluated timespan of these measures were used to calculate GHG emissions reductions. Measure lives are rounded to the nearest 6 months and range from 1 year to 25 years, depending on the durability of the measure.

Timing of GHG Emission Reductions

For the 2025–2027 Mass Save plans (2025–2027 Plans), investments begin on January 1, 2025, and continue until December 31, 2027. As a result, the first full year during which the maximum energy reductions for the 2025–2027 investments will occur is calendar year 2028. Due to the long measure lives of many Mass Save investments, the majority of GHG emission reductions from investments made during the 2025–2027 Plan are expected to continue in 2030, with a smaller proportion in 2040, and have little quantifiable emissions impact in 2050. The increased focus on market transformation and savings with a longer time horizon will increase Mass Save’s impact on the period of 2040 to 2050.

Historically, the Mass Save programs have reported GHG emissions on both an annual basis, and over the full lifetime of a measure or set of measures. Both metrics take a single year in isolation and ignore the emissions reductions of preceding and subsequent years, the gradual decay of the emissions reductions over time, or changes to the emissions impacts of a unit of energy conserved (see electricity emission factors below). This approach does not allow for alignment and comparison between the historical Mass Save program reporting and the annual statewide inventory of Mass DEP^[2] and the GHG reporting requirements of the Commonwealth.

Accordingly, the Mass Save GHG emissions reduction goals are being set, and will be required to be reported on, as the aggregate GHG emissions reductions to be achieved with energy efficiency measures implemented in 2025–2027 and are expressed as aggregate metric tons of carbon dioxide equivalent, to be measured at the conclusion of the three-year plan period.

Evaluated Measure Lives

Because evaluated measure lives can be changed by future evaluation studies, DOER and the Mass Save program administrators will use the measure lives as currently calculated effective March 1, 2025 and anticipated for the 2025–2027 plans as the basis for setting and assessing achievement towards this GHG emissions reduction goal.

Part Year Measure Application

For a subset of measures, their expected measure life results in the end of life part-way through either 2025 or 2030. For example, measures with a measure life of 5 years installed in the 3rd quarter of 2025 would be modeled to end their expected energy savings and corresponding GHG emissions reduction in the 3rd quarter of 2030. In the real world, there will be a gradual decay in measure emission reductions over a much wider time horizon, averaging 5 years in this example. For simplicity of calculation, DOER and the Program Administrators will assume that all measures installed at any time during a plan year, for example in 2025 with a 5-year measure life, will count as having 50% of their annual GHG emissions reduction in calendar year 2030, and so forth for other measure lives that end during calendar year 2025 or 2030. An exception to this policy will be behavior and active demand management savings occurring during a goal year, which are verifiably occurring as a full year benefit.

Adjusted Gross Savings

The Mass Save programs conduct evaluation studies to assess the extent to which supported measures would have been otherwise installed absent their intervention. Based on these evaluation studies, they apply net-to-gross adjustment factors that generally reduce claimable ‘net’ savings from the adjusted gross savings achieved by the measures installed. Net savings are the best way of showing the economic benefit of the Mass Save program investments. However, adjusted gross savings are the more applicable metric for the purpose of quantifying GHG emission reductions. Accordingly, the adjusted gross savings are used to set and assess progress towards achieving the Mass Save GHG reduction goal.

Emission Factors

To set a transparent and fair GHG emissions reduction requirement, the emission factors used to set the GHG reduction goal should also be used to report and assess progress towards achieving the Mass Save GHG reduction goal. This consistency across multiple years argues for simplicity and transparency in selecting the emission factors, while accounting for predictable changes in these factors over time.

Electric Sector GHG Emission Factors

For the purposes of developing the CECPs for 2025 & 2030^[3] and 2050,^[4] the Executive Office of Energy and Environmental Affairs (EEA) produced a forecast of emission factors from the electric generation sector for each 5-year increment from 2020 to 2050 and an interpolation for each year in between. This use of the current EEA forecast of average electric emission factors, shown in Table 3 below, allows for a consistent basis for both planning and evaluating the 2025–2027 plans' achievement of their GHG emissions reduction goals. Based on the broad mix of Mass Save program measures and the years-long time horizon for evaluating them, the average annual emissions factor, rather than more granular marginal emission factor will be applied to all measures.

Table 3. Average Electric Emission Factors by Year for Massachusetts in 2025 and 2030

Year	Metric Tons of Emissions per MWh (metric tons of CO ₂ e)
2025	0.2359
2030	0.1277

On-Site Fuel GHG Emission Factors

The emission factors of fossil fuels relevant to the Mass Save programs, natural gas, #2 heating oil, propane, are much more stable over time than the average emission factor for electricity utilized by buildings in Massachusetts over the course of a calendar year. While the carbon content and GHG emissions of these fuels vary over time, for ease of transparency and simplicity, the Program Administrators should hold emission factors constant, based primarily on carbon dioxide emissions from combustion of these fuels, using currently reported national values from the US Energy Information Administration (EIA)^[5] with the addition of a coefficient adjustment to incorporate upstream emissions as quantified in the 2024 Avoided Energy Supply Components (AESC) Study.⁵ These emissions coefficients are reproduced below with units of metric tons of CO₂e per million BTU in Table 4:

Table 4: Carbon Dioxide Emissions Coefficients by Fuel

Year	Natural Gas (metric tons of CO ₂ e/MMBtu)	Heating Oil (metric tons of CO ₂ e/MMBtu)	Propane (metric tons of CO ₂ e/MMBtu)
2025	0.06534	0.08848	0.07849
2030	0.06534	0.08848	0.07849

These emissions factors ignore the potential for renewable fuel blending such as bio-fuels and renewable natural gas or green hydrogen being introduced into these fuels in the 2025 and 2030 time horizon, which would reduce the GHG emissions reductions from energy efficiency measures. This assumption of unchanged fuel emissions factors assists in the avoidance of double-counting between Mass Save investments and other potential policy actions that might change the carbon content in the supply of these fuels. It allows Mass Save to compare investing in a measure to a counterfactual of not doing so.

Other Unanticipated Variables

In the event of unforeseen and unanticipated variables leading to notable changes between the 2025–2027 plan forecast and the 2025 and 2030 reporting years, the Mass Save Program

⁵ [AESC 2024.pdf \(synapse-energy.com\)](#)

Administrators and the Massachusetts Department of Energy Resources will endeavor to follow the principles of transparency and simplicity in quantifying any modifications needed and agreed to by both parties in reporting the results of the 2025–2027 plans.

Reporting on the Mass Save GHG Emissions Reduction Goal

To provide a fair evaluation of the Mass Save program implementation results, the final set of energy savings and resulting GHG emission reductions need to use a consistent set of assumptions to the set that were used to calculate the requirement initially. However, by 2030 there will be updated information related to savings, measure lives, emissions factors and so on, that if applied would change the results. Some of these changes will be impossible to roll back, such as shifting baselines due to appliance standards, code, or other outside influences. In recognition of this inevitable outcome, the reporting on the success of each plan's achievement of its GHG emissions reduction goal will be done in two separate sets of calculations. The first is as close to an 'apple-to-apples' calculation as possible, using the available information in March 2024 to evaluate the Mass Save plan results using the same set of assumptions used to set this goal. Some assumptions will be impractical to revert to March 2024 assumptions, so it is important to recognize that this comparison is as close to 'apple-to-apples' as feasible. The second is a 'best-available-data' calculation using updated assumptions on emissions factors, measure effectiveness, measure lives, and other variables that incorporate updated data at the time of reporting. The former 'apples-to-apples' calculation is intended to provide a fair benchmark to evaluate the success of the plans in meeting this goal. The 'best-available-data' calculation is intended separately to inform progress towards the Commonwealth's GWSA limits and sub-limits.

^[1] Mass Save refers to the joint effort of the Massachusetts electric and gas program administrators to implement energy efficiency measures pursuant to G.L. c. 25, sec. 21

^[2] <https://www.mass.gov/lists/massdep-emissions-inventories>

^[3] <https://www.mass.gov/info-details/massachusetts-clean-energy-and-climate-plan-for-2030>

^[4]

^[5] https://www.eia.gov/environment/emissions/co2_vol_mass.php

2025-2027 Three-Year Plan Public Comment Listening Sessions

Session #1

April 17, 2024, 10am-12:00pm

Meeting Registration: https://zoom.us/webinar/register/WN_Bt-UBsErQk63Nk6ybSNezg

Session #2

May 13, 2024, 2:00pm-4:00pm

Meeting Registration: https://zoom.us/webinar/register/WN_IRRXI3BDSW2WO0wYhjdyiQ

Session #3

June 3, 2024, 6:00pm-7:30pm

Meeting Registration: https://zoom.us/webinar/register/WN_vdLF6trZTa-Cvi6z_QOg_g

Public Comment Session Overview:

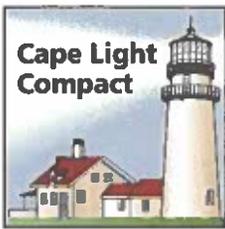
The Massachusetts Energy Efficiency Advisory Council (EEAC) will be holding three Public Comment Sessions, as it reviews the Mass Save® Program Administrators' draft for the next Three-Year Plan. The purpose of these sessions is for the EEAC to hear from members of the public on issues related to the Massachusetts energy efficiency programs, known as Mass Save.

Public comment on any topic related to the energy efficiency programs and the draft 2025-2027 Three-Year Plan are welcome, but need not be repeated, at each session. Public comments may also be submitted in writing to ma-eeac@mass.gov

Public Comment Session Format:

- All listening sessions will be held virtually via Zoom.
- Stakeholders who would like to provide public comment are asked to register for only one session, by emailing ma-eeac@mass.gov by 5 pm the day prior to the session they have selected.
- Submittal of written public comment via email is also encouraged and will be posted on the EEAC [website](#).

Each person providing public comment will be given 3 minutes to speak, in order to allow time for more to participate. Once everyone who has pre-registered has provided comment, others may have a chance to speak, as time allows.



Cape Light Compact JPE
261 Whites Path, Unit 4, South Yarmouth, MA 02664
Energy Efficiency 1.800.797.6699 | Power Supply 1.800.381.9192
Fax: 774.330.3018 | capelightcompact.org

March 15, 2024

MassHousing
One Beacon Street
Boston, MA 02108
ES.ConciergeServiceRFP@masshousing.com

RE: Cape Light Compact's Outreach Assistance and Customer Support for Energy Saver Home Loan Program

Members of the MassHousing Review Committee:

Thank you for the opportunity to respond to MassHousing's Request for Proposals (RFP) to provide customer support for the Energy Saver Home Loan Program. The Cape Light Compact (Compact) believes that it would be an excellent partner and is qualified to deliver the services MassHousing seeks.

The Compact is a municipal energy services organization operated by the twenty-one towns on Cape Cod and Martha's Vineyard. The Compact is a public entity as defined by Massachusetts General Laws and was formed in 1997 to advance the interests of consumers in the newly restructured electric industry. The Compact has been providing energy efficiency services to low-income and moderate-income customers for almost twenty-four (24) years, several years prior to the establishment of the MassSave® umbrella. The Energy Saver Home Loan Program is a natural progression of the energy efficiency services currently provided by the Compact. The Compact has well established relationships with organizations, such as Housing Assistance Corporation, Lower Cape Community Development Partnership, Island Housing Trust, serving low-income and moderate-income residents. These relationships will enable the Compact to coordinate the delivery of services offered under multiple state and federal programs, and most importantly minimize confusion for low- and moderate-income residents. The Compact will be able to minimize confusion because it has established relationships with other service providers, has name recognition, and is community based and focused.

Utilizing its existing Customer Service Center, the Compact will provide in-person, telephone, and electronic (Compact website) services to low-income and moderate-income residents. The Compact's Customer Service Center staff will be supported by the Compact's existing energy efficiency staff. Existing staff will address technical questions brought to them by the Outreach Specialist and/or Customer Service Center staff. The Compact will engage with other vendors selected by MassHousing to coordinate on a residents' decarbonization plan. The Compact will also integrate the Energy Saver Home Loan Program into its delivery of energy efficiency services through MassSave®. Compact vendors serving low-income and moderate-income residents will have marketing materials that describe all of the improvements, incentives and rebates that are available to a residential homeowner. Coordination of MassSave® and Energy Saver Loan Program

Working Together Toward A Smarter Energy Future

Aquinnah | Barnstable | Bourne | Brewster | Chatham | Chilmark | Dennis | Dukes County | Eastham | Edgartown | Falmouth
Harwich | Mashpee | Oak Bluffs | Orleans | Provincetown | Sandwich | Tisbury | Truro | Wellfleet | West Tisbury | Yarmouth

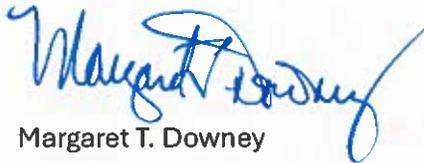
vendors and eligible improvements will reduce customer confusion and result in robust participation in both programs.

The Compact's past three (3) audited financial statements, Attachment A, provide insight into the financial stability of the Compact as well as the Compact's ability to administer public funds. The Compact is adept at preparing both financial and programmatic reports for state and local entities.

This proposal was prepared by myself and Briana Kane. Briana Kane, Energy Efficiency Implementation Manager, will be the primary point of contact for the Compact.

If selected for further discussion, the Compact is available to meet with MassHousing as requested.

Sincerely,



Margaret T. Downey
Chief Administrative Officer

Enclosure

Cc: Cape Light Compact Governing Board

A. Transmittal Letter:

See attached.

B. Cape Light Compact Experience and Qualifications:

The Cape Light Compact (Compact) is a municipal energy services organization operated by the twenty-one towns on Cape Cod and Martha's Vineyard. The Compact was formed in 1997 to advance the interests of consumers in the newly restructured electric industry. The Compact's early initiatives focused on consumer advocacy and aggregated power supply. In 2000 the Massachusetts Department of Public Utilities (DPU) approved the Compact's first five-year Energy Efficiency Plan. This was the first time in the nation that a group of municipalities, not already part of a municipal electric utility, began administering energy efficiency programs. For almost twenty-four years the Compact has been providing energy efficiency services to residential, income-eligible, and commercial customers.

The delivery of energy efficiency services has evolved in Massachusetts with the passage of the 2008 Green Communities Act, the 2021 Act Creating a Next Generation Roadmap for Massachusetts Climate Policy (Climate Act) and is set to pivot once again as the U.S. Inflation Reduction Act is rolled out. Throughout the evolution of energy efficiency and renewable energy services, the Compact has provided support to assist Cape and Vineyard customers as they participate in energy efficiency programs. This support is in-person at the Compact's office, via telephone at its fully staffed call center and on-line through the Compact's website. The Compact regularly attends community forums to respond to questions about available incentives, rebates and to help customers understand their options in their decarbonization journey.

The Compact administers MassSave® energy efficiency programs on Cape Cod and Martha's Vineyard. Compact staff understand what incentives/rebates are available to customers through MassSave® and what rebates/incentives are available through the Energy Saver Home Loan Program. Compact staff, from the Call Center to Program Managers, have been trained to assist customers in their decarbonization journey. Although the Compact has not labeled its services concierge services, the Compact has been providing comprehensive assistance to its customers for years. As programs evolved so has the Compact's level of assistance. Compact staff are uniquely qualified to provide concierge level services that MassHousing is seeking through this Request for Proposals (RFP).

Low-Income and Moderate-Income Homeowner Experience:

The Compact has provided no-cost energy efficiency services to low-income customers since 2000. The Compact facilitates energy efficiency services for over 10,000 low-income customers on Cape Cod and Martha's Vineyard by enrolling a customer in the energy efficiency program and handling phone calls and troubleshooting for the customer, as needed. Under this proposal the Compact would also service low-income and moderate-income customers in Nantucket. Implementation of the Compact's low-income energy efficiency program is through a contract with a local community action agency, Housing Assistance Corporation (HAC). Contracting with HAC enables the Compact to leverage federal and state funds that are not administered by the Compact or MassSave®.

The Compact was the first MassSave® Program Administrator to develop a suite of services for moderate-income customers. Recognizing that there was a demographic struggling with the required incentive co-payments, the Compact developed a no-cost weatherization offering for moderate-income customers that removed this barrier. The Compact developed a simplified income verification process/form and began in-house income verification over 16 years ago.

Cape Cod, Martha's Vineyard and Nantucket have one designated Gateway City, Barnstable; however, eighteen of the twenty-two towns are listed on the Massachusetts 2022 Environmental Justice Maps. The Compact is a public entity with local representation and insight into how to engage low-income and moderate-income residents in these communities.

MassHousing Experience:

The Compact and MassHousing have co-funded housing projects on Cape Cod and Martha's Vineyard. The goal of our joint efforts is to maximize funding opportunities for these projects. Most recently, the Compact co-funded a workforce housing project, located on Martha's Vineyard, and a 30-unit affordable multi-family rental housing project on Cape Cod with MassHousing.

Electrification and Renewable Energy Experience:

After the 2018 amendment to the Green Communities Act, the Compact began to advocate for and request funding for a residential offering that paired weatherization and electrification with behind-the-meter solar. The result of this effort was the Cape & Vineyard Electrification Offering (CVEO). CVEO focused on serving low-income and moderate-income customers because SMART data affirmed that this population was not installing solar and that electrifying a low-income and moderate-income home without solar could result in an increased energy burden for the customer. The Compact proposed CVEO in its 2019-2021 Energy Efficiency Plan, and the DPU required the Compact to conduct additional stakeholder engagement, which it did. The Compact proposed CVEO in its 2022-2024 Energy Efficiency Plan and the DPU approved CVEO in 2023. The Compact has been identifying and enrolling eligible low-income and moderate-income customers in CVEO over the past year. Enrollment in CVEO requires Compact staff and its vendors to provide participants with a comprehensive decarbonization plan for their home.

The Compact is in the process of finalizing a solar loan program through the US Department of Agriculture's Rural Energy Services Program. The Compact hopes to roll out this low interest, 2.75-3.0%, loan program in the third quarter of 2024. Because the lending requirements are different than the MassHousing 0-2% low interest loan program, the Compact believes these two loan products will be able to comprehensively serve all residents.

Experience Providing Advice or Services to Non-English Speaking Residents:

The Compact's Call Center is able to provide assistance to non-English speaking customers through Language Line Services, Inc. In Barnstable County, Cape Cod, 89.4% of the residents speak only English. The non-English language spoken by the largest group is other Indo-European, which is spoken by 6.73% of the population. In Dukes County, Martha's Vineyard, 83.15% of the residents speak only English. The non-English language spoken by the largest group is other Indo-European, which is spoken by 13.88% of the population. In Nantucket County, Nantucket, 84.39%

of the residents speak only English. The non-English language spoken by the largest group is Spanish which is spoken by 8.29% of the population, followed by Indo-European at 5.39%.

Response to Four Categories Identified in the RFP:

The Compact has been providing in-person support to all electric customers on Cape Cod and Martha's Vineyard for almost twenty-four (24) years. The Compact's offices are centrally located in Yarmouth, Massachusetts and are open to the public Monday-Friday, 8:00 am until 4:30 pm. Compact staff are available to meet with residents and businesses to discuss a variety of energy related topics. Over the years Compact staff have provided in-person services in the following topics:

- Assistance in understanding a customer's electric bill. Specifically, explaining the various charges on the electric bill.
- Help reviewing a Home Energy Assessment report and explaining potential next steps to a customer.
- Help directing customers to appropriate state agencies for assistance on matters outside of the Compact's jurisdiction.
- Connecting customers with local solar installers.
- Electrification of a customer's home including explaining how to operate a heat pump.

The Compact frequently attends community events as a guest speaker to talk about climate issues and decarbonizing your home or business. These meetings are usually in the evening or on the weekend.

1. Homeowner Outreach and Recruitment

a. Conduct targeted outreach to low and moderate-income homeowners, with a particular emphasis on homeowners in Gateway Cities and Environmental Justice communities to make them aware of the Energy Saver Home Loan Program and how it complements and builds on other rebate and incentive programs. The selected providers will be expected to coordinate with the MassHousing marketing consultants to be hired this spring;

- The Compact proposes to implement this offering to its existing Environmental Justice communities (14 Cape towns, 3 Vineyard towns) and expand its efforts for support, outreach, and recruitment to include Nantucket.

b. Serve as a first point of contact for low- and moderate-income homeowners who are interested in making energy-related improvements to their home and seeking more information about the Program;

- The Compact's call center works closely with customers on the Cape and Vineyard to enroll them into its energy efficiency programs as a Sponsor of MassSave®. The Compact enrolls all heating fuel customers for the Income Eligible offering, for customers above 60% AMI, the Compact enrolls electric, oil, and propane customers and for natural gas customers, provides direct referrals to the natural gas Lead Vendors' call center.

- The Compact would be able to enhance the customer experience for all customers regardless of heating fuel through the Energy Saver Home Loan Program.
- As a MassSave® Sponsor, the Compact is well positioned to provide information about the MassSave® offerings, as well as IRA/HER/HEAR information.
 - This is beneficial as the Compact would be able to clearly identify which offers are applicable, have rebates/incentives, and which offers would benefit from the financing opportunities through the Energy Saver Home Loan Program (ex. Solar PV) as well as being able to give clear guidance through the customer's journey.

c. Conduct bilingual or multi-lingual outreach in person and in writing to ensure that information is reaching non-English speaking households (identify languages in which organization is capable of providing service);

- As noted above, the majority of the residential customers proposed to be served only speak English. Residents that do not speak English will be served through the Compact's existing translation line service. The Compact's translation line provides services to the Spanish and Indo-European speaking residents. Working with its existing vendor, the Compact will have the ability to translate all program materials into Indo-European and Spanish languages.
- The Compact will collaborate with other community-based organizations that serve non-English speaking residents such as the Cape – Brazilian Work Center, Martha's Vineyard – Community Ambassador Partnership and Nantucket Atheneum Language English Language Learning.

d. Provide regular updates to MCCB™ on recruitment activities and results.

- See requirements in 4 below, all of which the Compact is capable, in addition to ad hoc and monthly reporting.

2. Coordination with Energy Services Provider and Home Decarbonization Contractors

a. Introduce homeowners to Energy Services Provider and assist with scheduling home energy assessment (including coordination with MassSave® as needed);

- The Compact currently introduces residents to energy efficiency contractors and assists in scheduling home energy assessments through MassSave®. If awarded this proposal, the Compact would be expanding its current services to include Energy Services Providers and Home Decarbonization Contractors.

b. Assist homeowners with review and interpretation of home energy audit findings and home improvement recommendations;

- The Compact's existing staff routinely assist homeowners with review and interpretation of their home energy assessment reports. If awarded the proposal,

the Compact will have a dedicated Outreach Specialist who, with the assistance of the Call Center staff, will coordinate services available to low-income and moderate-income homeowners through the Energy Saver Home Loan Program and MassSave®. The knowledge and understanding that Compact staff have of both programs will ensure that eligible residents get the maximum incentives/rebates available.

c. Assist homeowners in making decisions about home improvement priorities and related rebates, incentives, and tax credits;

- See above response.

d. Assist homeowners with selecting home improvements, choosing one or more MCCB™-approved contractors, and finalizing pricing.

- Expanding on the above, the Compact's trained staff are able to share program information, provide support, potential contract review, etc.

e. Assist homeowners with preparing rebate and incentive applications, if requested.

- The Compact will assist homeowners with this process as the Compact is very familiar with application processes.

3. Coordination with MassHousing Lender

a. Provide support for homeowners in preparing the required materials for the Energy Saver Home Loan application;

- The Compact has 18 years of experience both administering and providing customer assistance for the Massachusetts HEAT Loan program. The Compact will provide assistance to homeowners with their loan application.

b. Connect homeowner with a MassHousing approved lender.

- The Compact is a HEAT Loan Sponsor and has established relationships with multiple lending institutions. The Compact would be able to support the customer through the lending process.

4. Program Data Collection and Reporting

a. Provide quarterly reports to MCCB™ on the status of homeowner recruitment and retention, including a description of outreach activities and data on prospective homeowner participants;

- The Compact would be able to provide the requested information in quarterly reports as well as monthly and other ad hoc reports on an as needed basis.

b. Conduct a brief exit survey for homeowners who close a loan through the Program to assess their experience and identify major benefits as well as areas for improvement;

- The Compact is capable of putting together a robust survey that would be able to gather various levels of insight into the overall process, program offerings, lending process, areas of improvement, etc. The Compact would be able to administer the survey in electronic and paper format. The Compact would be happy to solicit feedback from MassHousing on the survey.
- c. Provide feedback to MCCB™ on barriers and potential mitigants to low and moderate income homeowner participation in the Program;
- The Compact would be happy to provide feedback on the program offerings to MCCB™.
- d. Participate in program planning and information-sharing meetings with MCCB™ and its partner agencies and contractors/consultants.
- The Compact would be happy to participate in virtual and in-person meetings.

C. Diversity, Equity & Inclusion Plan:

The Compact is not certified as a diverse business because the Compact is a public entity. The Compact is governed by Massachusetts General Laws. The Compact’s Governing Board adopted the Compact’s Policies and Procedures Manual, Attachment B to guide the Compact’s hiring practices.

The Compact Governing Board members are appointed by the twenty-one Compact member towns. Presently, the Governing Board has 16 male and 5 female members. The Compact staff senior leadership team is comprised of three women and one male.

Currently, 8 of the 30 Compact vendors meet the definition of a certified diverse business. The Compact began tracking certified diverse business in 2023. In 2023 the total dollar value awarded to these vendors was \$1,478,915.

D. References:

1. Jenn Rand, Town Administrator, Town of West Tisbury, 1059 State Road, West Tisbury, MA. Phone: 508-696-0102.
The Compact works with the Town on affordable housing projects, green communities grant and energy efficiency projects.
2. Donna Kalinick, Assistant Town Manager, Town of Brewster, 2198 Main Street, Brewster, MA. Phone: 508-896-3701 x 1100.
The Compact works with the Town on affordable housing projects, green communities grant and energy efficiency projects.
3. Elijah Sinclair, Program Manager, Massachusetts Clean Energy Center, 29 Washington Street, Suite 1150, Boston, MA. Phone: 587-415-6081.
The Compact has worked with MassCEC on projects ranging from green communities to renewable energy. The Compact is currently working with Mr.

Sinclair on a low-income and moderate-income E-bike program. The Compact received a grant from MassCEC to administer the E-bike program.

4. Philippe Jordi, Executive Director, Island Housing Trust, PO Box 779, West Tisbury, MA. Phone: 508-693-1171 x 1.
The Compact has provided energy efficiency services and funding to the income eligible residential properties owned and/or managed by Island Housing Trust.
5. Lauren Sinatra, Energy Coordinator, Town of Nantucket, 16 Broad Street, Nantucket, MA. Phone: 508-325-5379.
The Compact has provided technical assistance to the Town on its green communities grant.
6. Megan Amsler, Executive Director, Self-Reliance Corporation, PO Box 396, North Falmouth, MA. Phone: 508-563-6633.
The Compact collaborates with Self-Reliance distributing information on energy efficiency services, specifically electrification offerings. The Compact will be contracting with Self-Reliance to review residential solar proposals on the Compact's behalf under the USDA Residential Energy Services Program.

E. Project Plan:

1. Key Personnel:

The first point of contact for residents will be the Compact's Customer Service Center. A customer can contact the Customer Service Center in-person, by telephone or electronically (website or email). The Customer Service Center will be staffed with 3.5 FTEs. The Energy Saver Home Loan Program will have an Outreach Specialist, 1 FTE dedicated to the program. These 4.5 FTEs will be supported by the Compact's existing energy efficiency staff. Existing staff will address technical questions brought to them by the Outreach Specialist and/or Customer Service Center staff. The Compact has 10 FTEs to address technical questions. The Compact's Organizational Chart, Attachment C, is attached for reference purposes.

2. Methodology for Providing Services:

As noted above, customers seeking information about the Energy Saver Home Loan Program will have multiple ways to contact and interact with the Compact. The Compact will also engage with other vendors selected by MassHousing to coordinate on a resident's decarbonization plan. The Compact will also integrate the Energy Saver Home Loan Program into its delivery of energy efficiency services through MassSave®. Compact vendors serving low-income and moderate-income residents will have marketing materials that describe all of the improvements, incentives and rebates that are available to a residential homeowner. Coordination of MassSave® and Energy Saver Loan Program vendors and eligible improvements will reduce customer confusion and should result in robust participation in both programs.

3. Targeted Communities:

The Compact is proposing to provide concierge services to the low-income and moderate-income residents on Cape Cod, Martha's Vineyard and Nantucket. Cape Cod, Martha's Vineyard and Nantucket have one designated Gateway City, Barnstable; however, eighteen of the twenty-two towns are listed on the Massachusetts 2022 Environmental Justice Maps.

4. Project Phases:

a. Phase I would begin upon execution of a contract between the Compact and MassHousing and is expected to last as long as necessary to accomplish the following tasks:

- Orientation with representatives from MassHousing and other selected vendors.
- Minor updates to the Compact's database to ensure that all required data can be inputted and retrieved for reporting purposes. Approximate time for completing this task is 30 days.
- Training for Compact staff on the eligible improvements under the Energy Saver Home Loan Program. Approximate time for completing this task is 3-5 days.
- Compact Customer Service Center ready to provide Energy Saver Home Loan Program services to residents. Approximate time for completing this task is 45-60 days.
- Coordination with MassHousing marketing consultants and potential development of specific marketing materials. Approximate time for completing this task is 60-90 days.

b. Phase II would begin when the above tasks are completed, and MassHousing decarbonization vendor(s) are under contract and ready to offer decarbonization assessments as required by MassHousing. Marketing materials would be finalized and ready for distribution. The timeline for Phase II is not entirely within the Compact's control; however, since the Compact already has the infrastructure in place to provide concierge services, the Compact posits that it will be able to complete its tasks to provide the requested services in a short timeframe.

5. Expectations of MassHousing Staff:

As stated throughout this proposal, the Compact believes that it has the existing infrastructure and staff needed to provide the requested services. The Compact expects that it will interact with MassHousing staff during the orientation/training period and as required for reporting purposes.

F. Adverse Actions:

The has been no insurance claim, criminal investigation or material litigation against the Compact in the last ten years. There have been no formal complaints against the Compact filed with the courts or regulatory body in the last ten years.

G. Conflict of Interest:

The Compact does not have a conflict of interest or the appearance of a conflict of interest with MassHousing or MCCB™ that would prevent the Compact from providing the services under this RFP.

H. Pricing:

The budget below will serve the twenty-two (22) towns of Cape Cod, Martha's Vineyard and Nantucket.

		Year 1	Year 2	Year 3	Year 4	Year 5
Component 1						
	Marketing for 22 towns (mailings, print ads, social media, etc.)	\$50,000.00	\$50,000.00	\$50,000.00	\$50,000.00	\$50,000.00
	Translation Support	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00
	Software (database, reporting)	\$12,000.00	\$12,000.00	\$12,000.00	\$12,000.00	\$12,000.00
	Outreach Support	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00	\$25,000.00
Component 2						
	300 projects/year	\$175,000.00	\$175,000.00	\$175,000.00	\$175,000.00	\$175,000.00
Component 3						
	300 projects/year	\$100,000.00	\$100,000.00	\$100,000.00	\$100,000.00	\$100,000.00
Total Yearly Budget		\$382,000.00	\$382,000.00	\$382,000.00	\$382,000.00	\$382,000.00



Town of Nantucket

Planning and Land Use Services

Building ▪ Energy Office ▪ Historic District Commission ▪ Planning Board ▪ Zoning Board of Appeals

March 14, 2024

Massachusetts Housing Finance Agency
One Beacon Street
Boston, MA 02108

Re: Support for the Cape Light Compact's proposal for Outreach Assistance and Customer Support for Energy Saver Home Loan Program (Concierge Services)

Dear MassHousing:

On behalf of the Town of Nantucket, I am writing to express our support for the Cape Light Compact's proposal for Outreach Assistance and Customer Support for Energy Saver Home Loan Program (Concierge Services).

As a remote island, located at the furthest-end of the regional electric grid, Nantucket is at the forefront of climate change and recognizes the need to reduce global greenhouse gas emissions. Coastal erosion and inundation are now more widespread and more severe. The cost of energy and housing are amongst the nation's highest, due to costs associated with importing materials (including electrons) 30 miles across the Nantucket Sound from Cape Cod.

At the same time, the island is experiencing record growth as a summertime destination, which is stressing the island's infrastructure, including the island's local electric grid and supply of electricity from the mainland. Given the growing peak load demand for electricity, a third undersea cable may soon be needed at an estimated cost of \$200+ million to Nantucket ratepayers.

Such costly and disruptive infrastructure investments will be necessary unless meaningful *non-wire alternatives*—such as targeted energy efficiency campaigns and load shifting strategies—can be deployed to mitigate peak load growth and the cost burden to Nantucket's <14,000 ratepayers.

The Town of Nantucket's Energy Office was founded in 2011 with a mission to promote island-wide energy efficiency, renewable energy, and energy conservation opportunities that deliver significant cost savings and contribute to local sustainability and economic development goals.

We are excited to partner with the Compact on this opportunity, and are particularly proud to support:

- The Compact's experience delivering energy efficiency program to low and moderate-income homeowners.

- The Compact would be able to enhance the customer experience for all customers regardless of heating fuel through the Energy Save Home Loan program.
- The Compact is well positioned to provide information about the Mass Save offerings, as well as IRA/HER/HEAR information.

I urge MassHousing to award the funds requested by the Compact so that the Town of Nantucket and its residents can benefit from the loan program to cut their energy use and reduce or eliminate their reliance on fossil fuels.

Sincerely,



Lauren Sinatra
Energy Coordinator
Town of Nantucket; Energy Office
Lsinatra@nantucket-ma.gov
(508) 325-5379

TOWN OF
NANTUCKET
ENERGY OFFICE



Power Supply Rates: Industrial Rate Update

- The Compact set the Industrial rate for April meter reads through July meter reads
- Nearly 1.5 cents/kWh below Eversource Basic Service

	<u>Residential</u>	<u>Commercial</u>	<u>Industrial*</u>
	<i>Dec '23 - July '24 Cents/kWh</i>	<i>Dec '23 - July '24 Cents/kWh</i>	<i>April '24 - July '24 Cents/kWh</i>
CLC Standard	15.522	15.416	9.779
Local Green 50%	16.822	16.716	11.079
Local Green 100%	19.122	19.016	13.379
Eversource	17.216	17.552	11.265

*Industrial customers are customers with a load that is greater than an average of 100 kW for 12 consecutive billing months





The Commonwealth of Massachusetts

DEPARTMENT OF PUBLIC UTILITIES

NOTICE OF ROAD SHOW EVENTS

March 6, 2024

The Department of Public Utilities ("Department") will be hosting four Road Show events throughout 2024, starting in Boston on March 27, 2024. These Road Show events are an opportunity for the Department to engage directly with the public. Our three Commissioners, who oversee the Department, will give a presentation outlining the work that the Department does and our recent successes. Following the presentation, the Commission will take comments from the public. These events are free and open to all Massachusetts residents.

The Department is an adjudicatory agency that oversees investor-owned electric power, natural gas, and water companies in Massachusetts. In addition, the Department is charged with developing alternatives to traditional regulation, monitoring service quality, regulating safety in the transportation and gas pipeline areas, and overseeing the energy facilities siting process. The Department's mission is to ensure that consumers' rights are protected and that utility companies are providing the most reliable service at the lowest possible cost. The Department seeks to promote safety, security, reliability of service, affordability, equity, and greenhouse gas emission reductions. The actions of our agency affect nearly everyone in the Commonwealth, and our decisions will be better when we hear from you.

The first meeting in Boston will be hybrid (in-person and virtual), and the remaining sessions will be in-person only. Please register at the following link if you plan to attend any of these sessions: <https://projects.erg.com/conferences/MassDPU/RoadShowEvents/>. You may also request language interpretation and reasonable accommodations at this link.

The Department looks forward to seeing and hearing from you at one of the following sessions:

March 27, 2024, 6:00 pm – 7:30 pm

Department of Public Utilities
One South Station (700 Atlantic Avenue), Third Floor
Boston, MA 02110

May 29, 2024, 6:00 pm – 7:30 pm

Salem City Hall Annex
98 Washington Street
Salem, MA 01970

