



Massachusetts Program Administrators' Community First Partnership 2022-2024 Program Application

Funding and resources available for energy efficiency outreach

Background: Mass Save® is a collaborative of Massachusetts' natural gas and electric utilities and energy efficiency service providers, also known as the Sponsors of Mass Save. We help residents and businesses across Massachusetts save money and energy, leading our state to a clean and energy-efficient future through a wide range of incentives, services, rebates and resources.

As part of the Program Administrators' (PAs') 2022-2024 Three-Year Energy Efficiency Plan, the PAs are committed to working with a wide range of community-based organizations, municipalities and business organizations with demonstrated experience in reaching and servicing customers with low program participation rates and who are in need of targeted approaches to increase access and participation in energy efficiency programs through our Mass Save Community First Partnership (CFP).

Objective: The Community First Partnership is designed to leverage the local knowledge, trusted relationships, and experience of municipalities and community-based organizations to increase awareness and measurable participation in the PAs' energy efficiency offerings among all customers, with an emphasis on the following target groups: renters, residents whose primary language is not English, moderate income residents (defined as 60-80% of state median income) and small businesses through strategic partnership engagement, community-based social marketing and community-based participatory research.

Priority communities: Applications must propose to focus their outreach efforts in Environmental Justice (EJ) census blocks designated by the Commonwealth of Massachusetts. All applicants must also propose to work in EJ census blocks regardless of community. Application and outreach to focus on priority customer groups. A list of all eligible communities and priority communities is provided starting on page 8.

Who should apply:

- Municipal governments.
- 501c3 and 501c6 non-profit organizations or entities that have fiscal sponsorship through a 501c3 or 501c6 non-profit organization.
- Teams of non-profit organizations and/or municipalities working together are encouraged to apply.

Applicants can propose to focus their efforts across the geographic area of multiple municipalities. Please note that only one application per municipality will be accepted. (For example, if a non-profit submits a proposal to work in Everett, Revere and Chelsea, and the City of Revere separately submits a proposal with another non-profit to work in Revere, only one application will be accepted.)

Number of awarded applicants: Massachusetts PAs will select at least 12 municipalities and/or CBOs (Community Partner Teams) to participate.

MASS SAVE SPONSOR SUPPORT

- Financial support of up to \$60,000 per year for three years to support associated project cost.
 - Financial award is based on selected customer participation goal. Customer participation is defined as scheduled to complete work or with work completed.
 - Applicant team decides how to divide this goal between residential Weatherization (Wx), heating and cooling (HVAC), Small Business Turnkey (SMB) (for National Grid this also includes Serve Up Savings and Energy Smart Grocer) and Houses of Worship. Applicant teams focusing on residential Wx and HVAC should consider in their outreach planning how they will reach both income-eligible and market-rate (including moderate income) customers, as well as residents in both single-family and multifamily buildings.
 - Award per team is \$25K-\$60K annually and is aligned with the size of goals.



- Award is paid: 50% at start of year, 25% in June and the remaining 25% in September. A bonus award may be provided for surpassing goals in January of the following year. There will be an annual re-assessment of awards based on goals reached.

| | | | | | | | | |
|--------------|----------|----------|----------|----------|----------|----------|----------|----------|
| Goal | 250 | 300 | 350 | 400 | 450 | 500 | 550 | 600 |
| Award | \$25,000 | \$30,000 | \$35,000 | \$40,000 | \$45,000 | \$50,000 | \$55,000 | \$60,000 |

- PA(s) will provide a designated point of contact from both the gas and electric PA for the communities the applicant team will focus on.
- Mass Save and PA-specific marketing materials created and printed. These materials will be translated in up to three languages in addition to English. Materials may include:
 - o Brochures
 - o Posters
 - o Tear sheets
 - o Email and social media
 - o Bill inserts
 - o Tip sheets
 - o Several other marketing materials
- Monthly progress report on progress to goals.
- Monthly conference calls to discuss outreach, successes, challenges and best practices to address barriers to greater program participation.
- Local event support (to be agreed upon by PA and the Community First Partner [CFP]).
- Training sessions as needed to orient CFP on energy efficiency offerings, best practices and coordination with the local Community Action Program (CAP) or Low-Income Energy Affordability Network (LEAN).

APPLICANT REQUIREMENTS

- Must be a municipality, registered nonprofit or have a fiscal agent. Applicants representing multiple municipalities and/or nonprofits must designate a lead municipality/nonprofit that will receive disbursements of funds.
- Entities that already work in the implementation of Mass Save programs are not eligible to apply.
- Must have a track record of work in, and proposal to focus partnership activities in, designated Environmental Justice communities in Massachusetts.
- Must submit a completed application by the application deadline, which is January 10, 2022 at 5 p.m.
- Must commit to a three-year partnership.
- Must submit outreach, marketing and communication plan for first year and then annually each following year.
- Must submit budgets for all three program years, including a budget breakdown of how startup costs will be spent. Greater detail for year one budget will be expected; broader budget breakdown for years two and three is acceptable. Cost to compensate an Energy Advocate for 5-10 hours a week for at least \$17/hour must be included as a component of the budget.
- Must attend mandatory two-hour orientation on targeted Massachusetts PA offerings and best practices in marketing and community outreach. The day of this orientation is tentatively scheduled for February 10, 2022.
- Must participate in monthly calls and submit monthly outreach reports.
- Must complete at least one marketing activity per month. The marketing activity could include any of the following categories: social media posts, ads, direct mail, articles, video, informational flyers dispersed in the schools, workshops/webinars, etc.
- Must track and report progress – see additional detail in Outreach and Participant Tracking section.



- Must be open to building partnerships with additional community organizations.
- Must be open to completing local community organizing.
- Must be open to creating innovative strategies and initiatives to engage residents.
- Must have a primary contact who will dedicate 5-10 hours per week to this initiative. This person will be considered an “Energy Advocate.” This person can be the same as or in addition to the team’s designated Energy Advocate.
- Must coordinate with the local Community Action Program/LEAN Network agency to ensure clear process and support for income-eligible residents to access energy efficiency programs, including establishing an effective process for identifying income-eligible customers, explaining to them the increased benefits of participating in the low-income programs and referring all low-income customers to the local low-income program agency.
- Must submit a final report (one to three pages) on progress at the end of the year and hold a year-end review meeting with Program Administrators at the end of each year. PAs reserve the right to work with the applicant team to adjust their goals and budget if necessary.
- Must complete a survey annually on how the CFP has/will spend its award funding and how they would like to stay engaged with their PA(s) after their participation period.
- Must select at least one or more subset of customers to engage: small businesses, renters, bi-lingual customers or moderate-income customers.
- Must participate in creating and implementing community-based social marketing campaign.
- Must actively participate in program research and evaluation.
- Applications must be complete to be considered.

PARTNERSHIP DETAILS

- **Partnership path options**
 - Hub Team: Consisting of municipal staff, CBO member, CAP and PAs led by a PA-trained “Energy Advocate” who works 10hrs/week and coordinates quarterly meetings with municipal departments. PAs provide marketing templates.
 - Flex Format: Highly targeted approach; applicant proposes innovative outreach strategies; PA-trained Energy Advocate is on the team 10hrs/week; team creates their own marketing materials (materials must be approved by PAs prior to use) and team partners with contractors, landlords and employers.
 - For either path, Partners will convene monthly meetings with their team and include PAs. Energy Advocates track primary metrics; PAs track additional metrics.
- **Community-based participatory research**
 - PAs will create tracking tools to support Energy Advocates with tracking and recording participation barriers. PAs will utilize this data to build on the strengths and resources of the community by promoting co-learning among PAs and the Community First Partner to inform program development and goals.
- **Community-based social marketing**
 - As part of their Community First Partnership with the PAs, the PAs require that, in certain instances, marketing materials developed by any collaborating community-based organizations direct customers to the vendors directly contracted with them for those customers to participate in a Mass Save program offering. These instances include, but are not limited to, the following:
 - All small business customers.
 - Any residential customer that is on the discount rate code and is to be served by the local CAP agency.
 - Any residential customer who has had an energy assessment in the last two years.
 - All customers who reside in a multi-unit building that a Home Performance Contractor is not able to serve (criteria of this building classification is dependent on when/if the PAs move away from the 5+ unit requirement).



- This campaign will require accepted applicants to coalition diverse stakeholders who actively work with the hard-to-reach population. Applicants will allocate three to six months toward a planning process to reach the following benchmarks:
 - Select behaviors to promote.
 - Host focus groups to identify program barriers and benefits.
 - Develop strategy.
 - Identify target audience.
 - Develop compelling messages.
 - Obtain clear commitments from local stakeholders/groups.
 - Create an inclusive call to action.
 - Strategies on how to build community norms through this campaign.
 - Craft simple, clear messages for marketing and advertisement. Materials must be approved by the PAs prior to use.
 - Draft a list of PA approved prizes, awards and or raffles to engage the larger community.
 - Implement and evaluate strategy.
- **Implementation support - Lead Vendor**
 - PAs will hire a vendor to support coordinated implementation, such as supporting data tracking for partners, and training and supporting the Energy Advocates.
 - All program participants are required to work with the selected Lead Vendor to reach program goals.
- **Energy Advocates**
 - Will serve as an advocate for customers who need support and guidance to enroll in the Mass Save programs.
 - Will work with PAs to track and record participation barriers.
 - Will work to increase customers' program participation rates by supporting coordination between program vendors and customers.
 - Will actively communicate with customers to guide them through the application process and broker communication with stakeholders to reduce program participation barriers.
 - Will manage administering a community-based social marketing campaign to promote community-wide behavioral change by collaborating across a diverse group of partners.
 - Will submit reports to Lead Vendor to support tracking and exploring solutions to program participation barriers.
 - Will work 5-10 hours a week and be compensated.
- **Outreach and participant tracking**
 - PAs will provide baseline and monthly citywide progress and track use of campaign codes where possible. PAs will also use the Statewide Marketing annual awareness survey to track awareness of Mass Save programs in Partner communities, with demographic details.
 - Partners will receive support from an implementation vendor who will be helping to coordinate a tracking system to simplify and streamline the system for all. The Vendor will also help partners be able to track more accurately how many people/businesses participate in energy efficiency (EE) programs from their efforts.
- **Monthly tracking includes:**
 - Outreach progress summary including data collection on number of residents in each target group being reached.
 - Identification of baseline barriers to participation in each municipality and progress made toward breaking those barriers over multiple years.
 - Number of customer leads – partner will be expected to track names and contact information for customers they are working with.
 - Number of events organized and number of event attendees.
 - Number of social media, mail and other outreach and number of customers reached, number of languages used and number of pieces of collateral created in multiple languages.
 - Number of community members trained with an overview of energy efficiency programs.
 - Number of other organizations the CFP is engaging and how often.



- o Number of property owners of rental buildings generated as leads.
- o Optional: CFPs who want to track race/ethnicity and other demographic data of customer leads they generate will be expected to propose their own tracking system in their application and share that data with PAs.

ADDITIONAL RESOURCES FROM SPONSORING PROGRAM ADMINISTRATORS

Community First Partners will receive support from the PAs including, but not limited to:

- An orientation session including an introductory training on energy efficiency programs.
- Collateral may be co-branded with Mass Save, sponsoring Program Administrators, municipal seal, or organizational logo.
- Assistance planning local events.
- Periodic training sessions by content experts to orient CFPs on energy efficiency offerings, best practices and coordination with the local CAP or LEAN network to better serve low-income eligible residents.
- Training from the LEAN network on the Income Eligible program, incentives available to income-eligible customers and how to best ensure that income-eligible customers connect to energy efficiency programs.
- Contact with a utility company account manager to maximize energy efficiency opportunities in municipal buildings.
- Daily technical support from Lead Vendor to support with reaching program goals.
- Regularly scheduled meetings with Lead Vendor to provide guidance and deliberate on program performance and opportunities for growth.

Each CFP has the flexibility to pick from the above tools to meet their local needs.

MASS SAVE PROGRAM INFORMATION

Residential Coordinated Delivery

The Residential Coordinated Delivery (RCD) initiative (formerly called Home Energy Services [HES]) helps customers acquire comprehensive home energy efficiency upgrades via no-cost Home and Online Energy Assessments and facilitates comprehensive weatherization and home energy efficiency upgrades in existing homes to reduce whole-home energy consumption. RCD provides information, technical support services and contractors who assist residential customers make energy efficiency upgrades. The RCD initiative is fuel blind, meaning it provides awards and services to customers regardless of their primary heating fuel. The initiative aims to make it easy, clear, cost-effective and compelling for customers to implement energy efficiency upgrades. Within RCD, customers are eligible for a variety of assessment types to determine opportunity for efficiency upgrades, which include the Online Home Energy Assessment, the virtual Home Energy Assessment and the in-Home Energy Assessment.

Online Home Energy Assessment: The Mass Save Online Home Energy Assessment is a tool to help customers see how they're currently using energy, review efficiency recommendations and rebates, and receive an estimate of potential cost savings. Customers also learn if their home is a good candidate for an in-home or virtual energy assessment. The online assessment asks a series of questions to determine opportunities and make recommendations.

<https://www.masssave.com/en/saving/energy-assessments/online-home-energy-assessment>.

In-Home Energy Assessment: Mass Save Energy Specialists will visit the customer's home to identify opportunities for energy savings including reviewing the base load (evaluating opportunities for more efficient products), thermal boundary (identifying opportunities for additional insulation and air sealing) and mechanical equipment (assessing the HVAC equipment for efficiency). Efficient products such as advanced power strips and water-saving measures are provided at the visit to help customers start saving immediately. Additionally, customers receive a personalized report with recommendations on other savings opportunities and are provided information on available rebates and incentives.

Virtual Home Energy Assessment: All the same benefits of an in-home assessment, completed virtually. Mass Save Energy Specialists use video conferencing technology with customers to walk through their home virtually to identify opportunities for energy improvements. This includes products for instant energy



savings, such as smart strips and water-saving devices, that will be mailed directly to the customer, and recommendations for weatherization and heating and cooling equipment as applicable. Customers will receive a customized report along with information on applicable incentives and rebates.

<https://www.masssave.com/en/saving/energy-assessments/homeowners>

Residential Retail

The Residential Retail initiative ensures that all residential customers can access high-efficiency lighting, heating, cooling and water heating equipment, including thermostats, lighting controls, appliances and other energy-efficient products. It provides rebates to customers who prefer to buy their own products or work with a contractor rather than participating through the PAs' Residential Coordinated Delivery. Products include lighting and appliances and heating and cooling.

<https://www.masssave.com/en/saving/residential-rebates>

Small Business Turnkey

The Small Business Turnkey initiative offers a no-cost on-site energy assessment. Small business customers receive a site-specific proposal with recommended energy efficiency measures that may include lighting upgrades and controls, gas measures (for natural gas customers), walk-in cooler efficiency measures, and site-specific custom projects. PAs also provide removal of fluorescent lights and ballasts if necessary. PAs will cover up to 70% of the installation and equipment costs. Note that houses of worship and small 501(c)(3) non-profits are eligible for the Small Business Turnkey initiative.

<https://www.masssave.com/en/saving/business-rebates/energy-saving-solutions-for-small-businesses>

APPLICATION PROCESS

Applicants should use the attached application template and will be limited to six pages of text. Formatting in bulleted lists is recommended wherever possible. Applications must include the following:

- 1. An official letter of support** from your mayor, town manager, town administrator or energy manager applying on behalf of the municipality or community-based organization. If this is difficult to obtain, a letter of intent can also be submitted showing that your organization has communicated with the municipalities.
- 2. A summary of your strategy or high level overview of your activities to meet your goals** (3-10 bullet points/one page) that includes details on outreach to both small businesses and residents, including renters, moderate income residents and limited English proficiency customers.
- 3. A 12-month plan (limit three pages) detailing education, outreach and marketing.** This plan may not reflect the final set of activities implemented but should demonstrate how the municipality and/or community-based organization will be able to achieve its energy efficiency participation goals. Please provide a breakdown of how your strategies and tactics will consider residents who are renters, moderate income residents, limited English proficiency residents, and small businesses. Applicants are encouraged to take a look at data in the PAs' 2020 Residential Non-Participant Market Characterization and Barriers study, that details common barriers these groups face, in designing their outreach plan:
https://ma-eeac.org/wp-content/uploads/MA19R04-A-NP-Nonpart-MarketBarriersStudy_Final.pdf

The outreach plan should also include:

- o A description of the personnel/volunteers/interns who would be assigned to the project and their specific project responsibilities including a statement of qualifications of team members.
 - o If your municipality is also applying to or is a current participant in the DOER Green Communities program or MassCEC EmPower program, please note so and build on your activities in these programs where appropriate.
- 4. A description of any current and pre-existing relationships with organizations within your community.** (Limit one page), especially trusted community organizations that represent and/or work with renters, moderate income customers, limited English proficiency customers, and small businesses, and to what extent this initiative will build upon those partnerships. This description must also include the name of the municipality's contact person at the local LEAN agency, which can be found by ZIP Code here:
<https://www.masssave.com/saving/income-based-offers>



- 5. A description and budget breakdown of how the first-year budget will be spent (both narrative and Excel file format).** Please account for staffing, IT/internet, development of outreach materials, printing of outreach materials, translation or interpretation, and other expense categories with brief descriptions and amounts.

EVALUATION CRITERIA

Any municipality and/or community-based organization currently served by a PA is eligible to apply, including previous participants of the Municipal Partnership and National Grid Community Initiative. Selection of the proposals will be made by the PAs based upon the following criteria:

- 1.** Application completeness and quality, including:
 - o Ability to meet minimum Partnership requirements.
 - o Strength of ties to community and volunteers.
 - o Relevant experience.
 - o Community savings potential.
- 2.** Consideration of geographic, economic and demographic diversity, including:
 - o Community Partner Team proposes to focus on geographic areas that have below-average historic participation in the Massachusetts PA programs.
 - o Community Partner Team proposes to focus on geographic areas that have high concentrations of renters, moderate income customers and limited English proficiency customers, based on U.S. Census data.
 - o Community Partner Team proposes to focus outreach primarily in census blocks that meet that meets two or more of the state's Environmental Justice criteria and clearly proposes in its application how it will serve residents in Environmental Justice neighborhoods.
 - o Community Partner Team proposes to focus on geographic areas that have not previously engaged in similar Massachusetts PA initiatives.
- 3.** Applicants should outline specific outreach methods and efforts that they plan to implement and describe the role of any local community organizations in their effort. Examples of potential outreach methods include:
 - o Videos/interviews with municipal officials and other local leaders promoting energy efficiency.
 - o Partnering with large employers to reach employees who live in the municipality.
 - o Coffee hours for landlords and property managers.
 - o Co-sponsored events or webinars/workshops with local small business associations.
 - o Engagement with city community development, public works, etc., departments on water bill inserts and use of local assessors' data.
 - o Collaboration with local community organizations and faith-based groups to build trust and awareness about Mass Save among residents and ensure effective outreach to multilingual residents, and open houses hosted by local community members and small businesses to showcase energy efficiency upgrades.
 - o Partnering with schools and student or parent groups.

PROJECT SCHEDULE

Informational webinars with Massachusetts PA for interested applicants: **October 6 and October 7, 2021**

Last date for questions from communities: **January 6, 2022**

Proposals due: **January 10, 2022 at 5 p.m.**

Interview: Applicants should be prepared for a potential interview in **Mid-January 2022**, however not all applicants may be requested to conduct an interview.

Selected communities notified: **Mid-January**

Orientation: **February 10, 2022**

Start date: **February 10, 2022**

Community Partner Team/PA specific meetings: Will be held in **early Q1 2022** to discuss specific goals and marketing plans.

Program End Date: **December 31, 2024**



DISCLAIMER

The PAs may terminate a municipality and/or community-based organization's participation in the Community First Partnership if the PA determines the municipality and/or community-based organization is not demonstrating a good faith effort to reach the participation requirements as outlined throughout the document.

The PAs may, in their sole discretion, at any time and without notice, terminate the municipality and/or community-based organization's participation in the Community First Partnership or modify the Community First Partnership and the terms outlined herein. Community First Partnership expenditures, requirements and eligibility may be terminated, canceled or modified by Massachusetts PAs at any time without notice.

ADDITIONAL RESOURCES

<https://www.masssave.com/>

<https://www.mass.gov/info-details/environmental-justice-populations-in-massachusetts> Also see chart below for communities that meet multiple Environmental Justice (EJ) criteria and have 50% or more residents in EJ communities would be prioritized. Application and outreach must focus on priority customer groups.

For a town-by-town list, see Appendix B of the 2020 Residential Non-Participant Customer Profile Study, starting on page 86: https://ma-eeac.org/wp-content/uploads/MA19X06-B-RESNONPART_Report_FINAL_v20200228.pdf

Priority communities

Greater than 33% of the population resides in an EJ block group and the municipality (as a whole) meets the income criteria and at least one additional criterion (e.g., minority or English isolation) (based on 2020 data posted at state website) and consumption weighted participation rate from the Residential Non-Participant Customer Profile Study does not exceed 30%. Municipalities not served by PAs for either electric or gas are excluded.

| Municipality | Electric PA | Gas PA |
|------------------|--------------------|----------------------------------|
| Attleboro | National Grid | EGMA (Formerly Columbia Gas) |
| Boston | Eversource Energy | National Grid, Eversource Energy |
| Brockton | National Grid | EGMA (Formerly Columbia Gas) |
| Chelsea | Eversource Energy | National Grid |
| Chicopee | Not Served by PA | EGMA (Formerly Columbia Gas) |
| Eastham | Cape Light Compact | National Grid |
| Everett | National Grid | National Grid |
| Fall River | National Grid | Liberty |
| Fitchburg | Unitil | Unitil |
| Gardner | National Grid | Unitil |
| Gloucester | National Grid | National Grid |
| Great Barrington | National Grid | Berkshire Gas |
| Haverhill | National Grid | National Grid |
| Holbrook | National Grid | EGMA (Formerly Columbia Gas) |



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|------------------|-------------------|------------------------------|
| Lawrence | National Grid | EGMA (Formerly Columbia Gas) |
| Lowell | National Grid | National Grid |
| Lynn | National Grid | National Grid |
| Malden | National Grid | National Grid |
| Methuen | National Grid | EGMA (Formerly Columbia Gas) |
| Montague | Eversource Energy | Berkshire Gas |
| New Bedford | Eversource Energy | Eversource Energy |
| North Adams | National Grid | Berkshire Gas |
| Northampton | National Grid | EGMA (Formerly Columbia Gas) |
| Palmer | National Grid | EGMA (Formerly Columbia Gas) |
| Peabody | Not Served by PA | National Grid |
| Pittsfield | Eversource Energy | Berkshire Gas |
| Quincy | National Grid | National Grid |
| Randolph | National Grid | EGMA (Formerly Columbia Gas) |
| Revere | National Grid | National Grid |
| Southbridge | National Grid | National Grid |
| Springfield | Eversource Energy | EGMA (Formerly Columbia Gas) |
| Stoughton | National Grid | EGMA (Formerly Columbia Gas) |
| Taunton | Not Served by PA | EGMA (Formerly Columbia Gas) |
| Wareham | Eversource Energy | National Grid |
| Webster | National Grid | National Grid |
| West Springfield | Eversource Energy | EGMA (Formerly Columbia Gas) |
| Williamstown | National Grid | Berkshire Gas |
| Worcester | National Grid | Eversource Energy |



APPLICATION TEMPLATE

Please use this template along with the attached budget spreadsheet to complete your application. Bulleted list format is encouraged where possible. Applications must be limited to six pages of text.

| | | | |
|---|--|------------------|--|
| Primary Contact Name: | | Municipality/CBO | |
| Primary Contact Email: | | Phone: | |
| Primary Contact Position: | | | |
| Energy Advocate Name: | | | |
| Energy Advocate Email: | | | |
| Energy Advocate Phone: | | | |
| Total annual budget your team is requesting for 2022: | | | |

Note: If Energy Advocate role is not currently in place, the expectation is that it will be fulfilled by no later than early Q1 2022.

Please list the municipality(ies) where you plan to focus your outreach efforts:

Please check which of the priority groups you plan to focus your outreach efforts on: (Please check all that apply)

- Renters
- Low-Income Customers
- Moderate Income Customers
- English Isolated Customers
- Small Businesses

Please provide a breakout of your targeted goal, which corresponds with your requested award amount. If requesting for more than one municipality, please list for each.

- Number of small businesses planned to reach includes:

- Number of residential homes planned to be weatherized includes:

- Number of residential heating and cooling/HVAC upgrades includes:



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Part 1: An official letter of support from your mayor, town manager, town administrator or energy manager applying on behalf of the municipality or community-based organization. If this is difficult to obtain, a letter of intent can also be submitted showing that your organization has communicated with the municipalities. Note: Letter may be included as an attachment to this application.

Part 2: A summary of your strategy to meet your goals. (5-10 bullet points/up to one page) that includes details on outreach to the priority groups as you outlined above such as small businesses, renters, low-income and moderate-income residents, and limited English isolated customers.



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Part 3: A 12-month plan detailing education, outreach and marketing. (Limit three pages) This plan may not reflect the final set of activities implemented but should demonstrate how the municipality will be able to achieve its energy efficiency participation goals. Please provide a breakdown of how your strategies and tactics will consider each of the priority customer groups you are focusing your efforts on.

The following format should be used for the 12-month activity plan. You are encouraged to add additional rows to each section.

| Activity Description | Jan. | Feb. | Mar. | Apr. | May. | Jun. | Jul. | Aug. | Sep. | Oct. | Nov. | Dec. |
|--|------|------|------|------|------|------|------|------|------|------|------|------|
| Meetings, Trainings and Organization | | | | | | | | | | | | |
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| Marketing Activities | | | | | | | | | | | | |
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| Events to Organize | | | | | | | | | | | | |
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| Community Groups to Coordinate/Meet/Communicate With | | | | | | | | | | | | |
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Description of the personnel/volunteers/interns who would be assigned to the project and their specific project responsibilities, including statement of qualifications of team members. If your team represents a partnership between multiple community organizations and/or municipalities, please include that information in this section.



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Space left blank in template but may be filled in by applicant with continued answer to Part 3.



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Part 4: A description of any current and pre-existing relationships with organizations within your community (limit one page), especially trusted community organizations that represent and/or work with renters, moderate income customers, limited English proficiency customers and small businesses, and to what extent this initiative will build upon those partnerships. This description must also include the name of the municipality's contact person at the local Low-Income Energy Affordability Network (LEAN) agency, which can be found by ZIP Code here: <https://www.massave.com/en/saving/%20income-based-offers/>



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Part 5: A description of how the start-up award and remaining achievable award funds be used (please provide both a narrative up to two paragraphs and complete the attached Excel file).