

Massachusetts program administrators' municipal partnership 2020 application

Funding and resources available for energy efficiency outreach

Municipal partnership description

Mass Save® is a collaborative of Massachusetts' natural gas and electric utilities and energy efficiency service providers, including Berkshire Gas, Blackstone Gas Company, Cape Light Compact, Columbia Gas of Massachusetts, Eversource, Liberty Utilities, National Grid and Unitil known as the Program Administrators (PAs). We empower residents, businesses, and communities to make energy-efficient upgrades by offering a wide range of services, rebates, awards, trainings, and information.

As part of the Program Administrators 2019–2021 Three Year Energy Efficiency Plan, the PAs are committed to working with municipalities to reach residents and businesses with energy efficiency services and offers in support of the PAs' efforts for broader reach of energy efficiency across Massachusetts through a Municipal Partnership.

The objective of the Municipal Partnership is to leverage the local knowledge, trusted relationships, and experience of municipalities to increase awareness and measurable participation in the PAs' energy efficiency offerings among all customers, with an emphasis on market rate¹ renters, market rate residents whose primary language is not English, moderate income residents (defined as 60–80% of state median income), and small businesses. The PAs are soliciting applications from municipalities interested in teaming up to become a Municipal Partner. Municipalities currently served by a PA are eligible to apply. Interested municipalities must provide a municipal staff point of contact for this partnership, provide public education and outreach on a local grass roots level, participate in periodic calls and trainings, and collaborate on marketing efforts for the period of January 1 through December 31, 2020. Massachusetts PAs will select at least six municipalities to participate in the Municipal Partnership for 2020.

To become a Municipal Partner, the municipality must submit this application. Submission of an application indicates the municipality's agreement to plan and execute 12 months of public education and outreach, such as marketing or events to drive measurable participation in PA initiatives, which include the following:

Residential Coordinated Delivery

Residential Coordinated Delivery ("RCD") (formerly called Home Energy Services "HES") facilitates comprehensive weatherization and home energy efficiency upgrades in existing homes to reduce whole-home energy consumption. The initiative provides information, technical support services, and contractors who assist market rate 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 RCD initiative helps customers acquire comprehensive home energy-efficiency upgrades via no-cost Home and Online Energy Assessments, with a focus on weatherization and heating and cooling systems. The initiative uses awards, financing, outreach and education, and relationships with partner energy efficiency companies to make it easy, clear, cost-effective and compelling for customers to implement energy efficiency upgrades.

¹ Market Rate refers to customers above 60% of state median income. PAs are committed to reaching all residents, however low income customers will be served through the existing delivery infrastructure and not counted towards the goals in this partnership. Outreach to low-income residents is conducted by community action programs (the Low-Income Energy Affordability Network, or LEAN). Low income is defined as households at or below 60% of state median income. The Municipal Partnership will connect municipalities with the local Low Income Energy Affordability (LEAN) Network agency to ensure that these customers are properly referred and fully participating in low-income energy efficiency programs. Low-income programs provide comprehensive energy efficiency services at no customer cost, making it critical to ensure that eligible customers are served through these programs.



WE ARE MASS SAVE®:



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 awards and rebates to customers who prefer to buy their own products or work with a contractor rather than participating through the PAs' RCD. Products include lighting and appliances, heating and cooling, and weatherization.

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. Massachusetts PAs will cover up to 70% of the installation and equipment costs. Note that houses of worship and small 501c3 non-profits are eligible for the Small Business Turnkey initiative.

Resources provided to participating municipalities

1. Financial award

Upon goal achievement, the selected municipalities are eligible for the following financial award based on their town/city population size:

- Population \geq 60,000 eligible for \$25,000
- Population 45,000–59,999 eligible for \$20,000
- Population 30,000–44,999 eligible for \$15,000
- Population 20,000–29,999 eligible for \$10,000
- Population $<$ 20,000 eligible for \$5,000

Selected municipalities will receive the first \$2,000 of the financial award in January 2020 to be used for costs associated with their energy efficiency plans.

To earn the financial award as outlined above, a municipality may accumulate up to 100 points during the 2020 calendar year based on achievements toward three goals, which are detailed in the table below:

- a. Installation of major energy efficiency measures
- b. Improvements to historical participation rates
- c. Service to target customers

When a municipality accumulates 100 points based on the point system below, it will receive its financial award, less the initial \$2,000 paid in January. If a municipality is unable to accumulate 100 points by the end of the 2020 calendar year, the municipality will earn a percentage based on the total number of points accumulated.

Points awarded	Goal*
25	Achieve a 5% increase in market rate online residential energy assessments over the prior year through the municipality's PA
25	Achieve a 10% increase in the number of market rate residential insulation jobs over the prior year through the municipality's PA
25	Achieve a 5% increase in the number of market rate residential heating and/or cooling upgrades over the prior year through the municipality's PA (note, this does not include thermostats)
10	Achieve a 5% increase in the number of small businesses competing in the Small Business Turnkey offering. A small business is defined as a commercial/industrial user with annual consumption of less than 40,000 therms and/or less than 1.5 million kWh.
15	Substantial completion of the activity plan outlined in Part 3 of the Application Template following this application to encourage participation in Mass Save among the following target groups ² : <ul style="list-style-type: none">• Market-rate limited English proficiency residents• Market rate renters• Moderate income residents

* "Increase" indicates an increase over 2018 and 2019 participation by municipality. Each municipality will receive details on their 2018 and 2019 participation prior to January 1, 2020.
² PAs recognize that residents may be part of several groups at the same time, and the action plan can reflect that based on the needs of the municipality.

2. Additional resources from sponsoring program administrators

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

- A designated PA point of contact
- Mass Save and PA-specific marketing materials in multiple languages (brochures, flyers, tear pads, lawn signs, etc.)
- Collateral may be co-branded with Mass Save, sponsoring Program Administrators, municipal seal, or logo of the sustainability or energy committee
- Periodic information about a municipality's progress against goals
- Monthly conference calls to discuss outreach, successes, challenges and best practices to address barriers to greater program participation
- Assistance planning local events
- Periodic training sessions by content experts to orient Municipal Partners on energy efficiency offerings, best practices, and coordination with the local Community Action Program (CAP or LEAN) Agency to better serve low-income eligible residents
- Contact with a utility company account manager to maximize energy efficiency opportunities in municipal buildings

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

In Part 3 of the application template, municipalities should outline specific outreach methods and efforts that they plan to implement and in Part 4 describe the role of any local community organizations in their effort.

Examples of potential outreach methods include:

- Partnering with large employers to reach employees who live in the municipality,
- Coffee hours for small landlords and property managers
- Co-sponsored events with local small business associations
- Engagement with municipal departments, such as community development or public works, on water bill inserts and use of local assessor's data
- Collaboration with local community organizations to build trust and awareness about Mass Save among residents and ensure effective outreach to multilingual residents
- Open houses hosted by local community members and small businesses to showcase energy efficiency upgrades

Regarding sharing of information about a municipality's progress toward goals, please note that PAs are prohibited by Department of Public Utilities (DPU) order from providing personally identifying customer information, such as lists of customer contact information, and the information shared will be in aggregate form.

3. Eligibility, requirements, modifications, and termination

Municipalities alone are eligible to apply.

- Those municipalities applying should designate one lead point of contact among municipal staff.
- Commitment period of one year, January through December 2020
- Performance awards achieved will be disbursed directly to the municipality and must be spent on energy efficiency related projects, both outreach and to offset the cost of energy efficiency upgrades, for residents, businesses, and/or municipal buildings in the municipality.

4. Minimum participation requirements

Municipalities may engage interns/fellows, volunteers, and other civic groups and business associations to help with the following:

- Attend mandatory two-hour training on targeted Massachusetts PA offerings and best practices in marketing and community outreach. The training will take place in early December 2019 and selected municipalities will be kept informed about the final date.
- Complete at least one marketing activity per month February to November 2020. The marketing activity could include any of the following categories: social media posts, ads, direct mail, door hangers, articles, video, informational flyers dispersed in the schools, etc.
- Participate in a monthly call.
- Provide a summary of how start-up costs will be spent, brief monthly outreach progress summary, and a final report (1-3 pages) on progress at the end of the year.
- At the end of the 2020 calendar year fill out a brief survey on how the city/town will spend its award funding and how they would like to stay engaged with their PA(s) after their Municipal Partnership participation year.
- Coordination with the local CAP/LEAN agency to ensure clear process and support for low-income residents to access energy efficiency programs, including establishing an effective process for identifying low-income 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. (Mandatory)

5. Application process

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

- 1. An official letter** from your mayor, town manager, town administrator or a person authorized to commit the municipality to submitting this application on behalf of the municipality.
- 2. A summary of your strategy to meet your goals (3-10 bullet points)** that includes details on outreach to both small businesses and market rate 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 will be able to achieve its energy efficiency participation goals. Please provide a breakdown of how your strategies and tactics will consider market rate residents who are renters, moderate-income residents, limited English proficiency residents, and small businesses. This plan should include establishing connections with groups in the municipality working on behalf of/representing these target groups, as well as organizing outreach efforts including presentations/workshops and articles in local non-English publications.

It should also include:

- 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
 - If your municipality is also applying to or is a current participant in the DOER Green Communities program or MassCEC Solarize, Solarize+, or HeatSmart programs, please note that 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 Low Income Energy Affordability (LEAN) Network agency, which can be found by ZIP code here: MassSave.com/en/saving/income-based-offers/
 - 5. A description of how the start-up award and remaining achievable award funds will be used (limit two paragraphs).** How do you plan to use the award monies to further energy efficiency in your town/city?

6. Evaluation criteria

Any municipality currently served by a PA is eligible to apply. Selection of the proposals will be made by the PAs based upon the following criteria:

1. Application completeness and quality, including:

- i. Ability to meet minimum Municipal Partnership requirements
- ii. Strength of ties to community and volunteers
- iii. Relevant experience
- iv. Community savings potential

2. Consideration of geographic, economic, and demographic diversity, including:

- i. Municipality has below-average historic participation in the Massachusetts PA programs
- ii. Municipality has high concentrations of renters, moderate-income customers, and limited English proficiency customers
- iii. Municipality has – and proposes in its application to serve – at least one census block group in the community that meets two or more of the state’s [Environmental Justice](#)³ criteria

7. Project schedule

Last Date for Questions from Communities and Letters of Intent 10/30/2019

Proposals Due 11/6/2019

Selected Communities Notified Early November 2019

Mandatory Orientation and Training Early December 2019

Start Date 01/1/2020

End Date 12/31/2020

Municipalities that are not accepted in the 2020 Municipal Partnership are encouraged to reapply for the 2021 cohort.

Applications must be complete to be considered.

8. Acceptance

By executing this Application, you accept and agree to the terms and obligations stated herein. Some PAs may also require a mutually acceptable Memorandum of Agreement or similar document prior to final selection and commencement of the Municipal Partnership.

³ [https://www.mass.gov/info-details/environmental-justice-communities-in-massachusetts#what-is-an-environmental-justice-community?-](https://www.mass.gov/info-details/environmental-justice-communities-in-massachusetts#what-is-an-environmental-justice-community?)

Part 3

A 12-month plan (limit 2.5 pages) detailing education, outreach, and marketing. 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 market rate residents who are renters, moderate income customers, limited English proficiency customers, and small businesses.

This plan should include establishing connections with groups in the municipality working on behalf of/ representing these target groups, as well as organizing outreach efforts including presentations/workshops and articles in local non-English publications.

The following format should be used for the 12-month activity plan. You're encouraged to add additional rows where needed, which you can submit via an Excel spreadsheet.

Activity description	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
Meetings, trainings and organization												
Marketing activities												
Events to table												
Events to organize												
Groups in the community to coordinate/meet/communicate with												

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.
