



Massachusetts Program Administrators' Municipal Partnership 2021

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 PAs' 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 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. 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. PAs strongly encourage applicants to also identify at least one community-based organization to provide grassroots organizing, public education, and engagement activities in collaboration with the municipality, participate in periodic calls and training, and collaborate with Program Sponsors to tailor marketing efforts to reach identified populations for the period of January 1 through December 31, 2021. Massachusetts PAs will select at least six municipalities to participate in the Municipal Partnership for 2021.

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 among the above-mentioned target groups in PA initiatives which include the following:

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 in order 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

Saving energy and money is easy with the Mass Save Online Home Energy Assessment. See how you're currently using energy, review efficiency recommendations and rebates, and receive an estimate of potential cost savings. You'll also learn if your home is a good candidate for an in-home or virtual energy assessment. Visit MassSave.com and click the link to get started. The online assessment will ask a series of questions to determine opportunities and make recommendations.

WE ARE MASS SAVE®:





Virtual Home Energy Assessment

Take advantage of the same benefits of an in-home assessment, virtually. Together using video conferencing technology, the customer and Energy Specialist can walk through the home virtually to identify opportunities for energy improvements. This includes products for instant energy savings, such as LED bulbs, and water savings 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.

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 including LEDs), thermal boundary (identifying opportunities for additional insulation and air sealing), and mechanical equipment (assessing the HVAC equipment for efficiency). Efficient products such as LED bulbs, advanced power strips, and water savings measures will be provided at the visit to help customers start saving immediately. Additionally, customers will receive a personalized report with recommendations on other savings opportunities and be provided information on available rebates and incentives.

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 & appliances and heating & cooling.

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.

RESOURCES PROVIDED TO PARTICIPATING MUNICIPALITIES

1. FINANCIAL AWARD

Upon goal achievement, the selected municipalities are eligible for the following financial award based on the population of residents for their town/city living in designated Environmental Justice (EJ) Census Blocks, according to 2010 Census data (download the PDF here to find data for your municipality: <https://www.mass.gov/doc/ej2010communitystatisticspdf> :

- Population in EJ neighborhoods <25,000 eligible for \$25K
- Population in EJ neighborhoods 10,000-24,999 eligible for \$20K
- Population in EJ neighborhoods 5,000-9,999 eligible for \$15K
- Population in EJ neighborhoods 2,000-4,999 eligible for \$10K
- Population in EJ neighborhoods <2,000 eligible for \$5K

Upon executing the partnership agreement, all municipalities will be eligible for an additional \$3,000 worth of customized marketing materials in several languages generated and provided by the PAs, that will direct customers to energy efficiency lead vendors.

Selected municipalities will receive the first \$2,000 or 30% of the financial award (whichever is greater) in early Q1 2021 to be used for costs associated with their energy efficiency plans. They will receive another 30% of their financial award upon reaching 50% of their goals, and the remainder of their award in January 2022.



To earn the financial award as outlined above, a municipality may accumulate up to 100 points during the 2021 calendar year based on achievements toward six goals:

- A. Installation of major measures
- B. Improvements to historical participation rates
- C. Service to target customers
- D. Marketing, communication, outreach and engagement plan.
- E. Identify community-based partner(s)
- F. Participation in monthly calls and submission of monthly outreach report to PAs

When a municipality accumulates 100 points based on the point system below, it will receive the final installment of its financial award. If a municipality is unable to accumulate 100 points by the end of the 2021 calendar year, the municipality will earn a percent based on the total number of points accumulated.

Points awarded	Goal*
15	Achieve a 10% increase in online residential energy assessments over the prior year through the municipality's Mass Save PA.
20	Achieve a 15% increase in the number of residential insulation jobs over the prior year through the municipality's Mass Save PA.
20	Achieve a 15% increase in the number of residential heating and/or cooling upgrades over the prior year through the municipality's PA (note, this does not include thermostats).
10	Achieve a 10% increase in the number of small businesses participating in the Small Business Turnkey initiative. A Small business is defined as commercial/industrial users with annual consumption of less than 40,000 therms or 1.5 million kWh.
15	Follow through, over the course of 2021, on an action plan submitted as part of the application to encourage participation in Mass Save among the following target groups: <ul style="list-style-type: none"> • Limited English proficiency residents • Renters • Moderate income residents 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.
15	Create and submit a marketing, communication, outreach, and engagement plan to support project goals, installation of significant measures, improvements to historical participation rates, and service target customers. Participate in monthly calls and submit monthly outreach report to the PAs to track progress toward goals laid out in engagement plan.
5	Identify community-based partners and outline their role and engagement with PAs and target customers.

* "Increase" indicates an increase over 2017-2019 participation by municipality. Each municipality will receive details on their 2017-2019 participation prior to beginning their outreach activities.

Towns will receive additional points for over achieving on major measure goals that will qualify them for a bonus, based on the percent increase achieved over their goals.

1. 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 staff point of contact
- An orientation session including an introductory training on energy efficiency programs
- Mass Save and PA-specific marketing materials in multiple languages (brochures, flyers, tear pads, etc.) directing customers to PA lead vendors for energy efficiency programs
- 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 Low-Income Energy Affordability Network) Agency 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

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

In the "Evaluation Process" section below, municipalities 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:

- Videos/Interviews with municipal officials and other local leaders promoting energy efficiency
- Partnering with large employers to reach employees who live in the municipality
- Coffee hours for small landlords and property managers
- Co-sponsored events or webinars/workshops with local small business associations
- Engagement with city community development, public works, etc. departments on water bill inserts and use of local assessor's data
- 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.
- Partnering with schools and student or parent groups

3. ELIGIBILITY, REQUIREMENTS, MODIFICATION, AND TERMINATION

Municipalities alone are eligible to apply.

- Those municipalities applying should designate one lead point of contact among municipal staff, as well as a person who will be managing the project. That person can be a municipal staff member or be appointed by the municipal staff
 - Please note, the identified municipal staff will be the PAs' designated contact. Should a municipality decide to work with a Home Performance Contractor, or Community Based Organization, it will be the responsibility of the municipal point of contact to share information
- Commitment period of one year, January 1st 2021 through December 31st 2021
- Performance awards achieved will be disbursed directly to 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 day of this training is TBD but will take place in early December 2020.
- Complete at least one marketing activity per month February to November 2021 – 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.
- Participate in monthly calls with the PAs and other community partners.
- Reporting to PAs:
 - » Provide a budget breakdown of how startup costs will be spent,
 - » Brief monthly outreach progress summary including data collection on number of residents in each target group being reached, and
 - » A final report (1-3 pages) on progress at the end of the year
- At the end of the 2021 calendar year fill out a brief survey on how the city/town has/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 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. (Mandatory)

As part of their Municipal Partnership with the PAs, the PAs require that in certain instances, marketing materials developed by the Municipal Partner and 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).

5. APPLICATION PROCESS

Applicants 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 of support** from your mayor, town manager, town administrator or energy manager 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 residents, including renters, moderate income residents, and limited English proficiency customers.
3. **A twelve-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 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: http://ma-eeac.org/wordpress/wp-content/uploads/MA19R04-A-NP-Nonpart-MarketBarriersStudy_Final.pdf. The outreach plan 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 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/en/saving/income-based-offers/>
- 5. A description and budget breakdown of how the start-up award and remaining achievable award funds will be used (Either narrative up to two paragraphs or an excel file)**. 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, including previous participants of the Municipal Partnership and National Grid Community Initiative. Selection of the proposals will be made¹ 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, based on U.S. Census data
- III. Municipality has at least one census block group in the community 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
- IV. Municipality has not previously engaged in similar Massachusetts PA initiatives

3. As a selection criterion, Eversource will also be considering a municipality's commitment to energy efficiency at the municipal level in addition to service residents and small businesses. Municipalities served by Eversource will commit to energy savings in their municipal buildings and can also consider using these funds toward future energy efficiency improvements, over and above any Mass Save awards associated with the particular energy efficiency measures installed.

1. <https://www.mass.gov/info-details/environmental-justice-communities-in-massachusetts#what-is-an-environmental-justice-community?>
2. For a town by town list, see Appendix B of 2020 Residential Non-Participant Customer Profile Study, starting on page 86: http://ma-eeac.org/wordpress/wp-content/uploads/MA19X06-B-RESNONPART_Report_FINAL_v20200228.pdf
3. <https://www.mass.gov/info-details/environmental-justice-communities-in-massachusetts#what-is-an-environmental-justice-community?>



7. PROJECT SCHEDULE

Informational webinar with Massachusetts PA for interested applicants 09/24/2020

Last Date for Questions from Communities and Letters of Intent 9/30/2020

Proposals Due 10/9/2020

Selected Communities Notified Early November 2020

Mandatory Orientation and Training December 9, 2020

Start Date 01/01/2021

Municipal/PA specific meetings will be held in early Q1 2021 to discuss specific goals and marketing plans

End Date 12/31/2021

Applications must be complete to be considered.

DISCLAIMER

The PAs may terminate a municipality's participation in the Municipal Partnership if the PA determines the municipality is not demonstrating a good faith effort to reach the Minimum Participation Requirements as outlined below.

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



APPLICATION TEMPLATE

Please use this template to complete your application. Bulleted list format is encouraged where possible. Applications must be limited to five pages of text; the letter of endorsement may be included as an attachment.

Point of Contact Name:		Municipality:	
Email:		Phone:	
Position:			

Part 1
An official letter from your mayor, town manager, town administrator or energy manager submitting this application on behalf of the municipality.
 Letter may be included as an attachment to this application or directly in this document.

Part 2
A summary of your strategy to meet your goals (3-10 bullet points/one half page) that includes details on outreach to both small businesses and residents, including renters, moderate income residents, and limited English proficiency customers.

Part 3
A twelve-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 residents who are renters, moderate income customers, limited English proficiency customers, and small businesses.

The following format should be used for the twelve-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												
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.



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



Part 4

A description of any current and pre-existing relationships with organizations within your community (Limit one half 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.masssave.com/en/saving/income-based-offers/>



Part 5

A description of how the start-up award and remaining achievable award funds be used (Limit one half page). How do you plan to use the award monies to further energy efficiency in your town/city?