

April 23, 2024



2025-2027 Draft Plan

WE ARE MASS SAVE®:



EVERSOURCE



nationalgrid



Agenda

2025-2027 Draft Plan: Key Goals

Equity Overview

Residential Delivery

Customer Experience

Key Dates

25-27 Plan Goals

WE ARE MASS SAVE®:



2022-2024 Plan



Weatherize approximately **186,000 homes**, including **20,000 low-income households**.



Supported the installation of heat pumps in over **63,000 homes**, including **6,600 low-income households**.



Invest **\$550 million in incentives** for low- and moderate-income households.



Reduce greenhouse gas (GHG) emissions by **845,000 metric tons** of carbon dioxide equivalent (CO₂e).

The Next Three Years



Weatherize **174,000** homes, including **48,000** low- and moderate-income households.



Support the installation of heat pumps in over **115,000** households, including **16,000** low- and moderate-income households.



Invest **\$1 billion in incentives** for low- and moderate-income customers and renters.



Reduce GHG emissions by **1.0 million metric tons of CO₂e**.

Key Plan Priorities



Reduce
Greenhouse
Gas Emissions



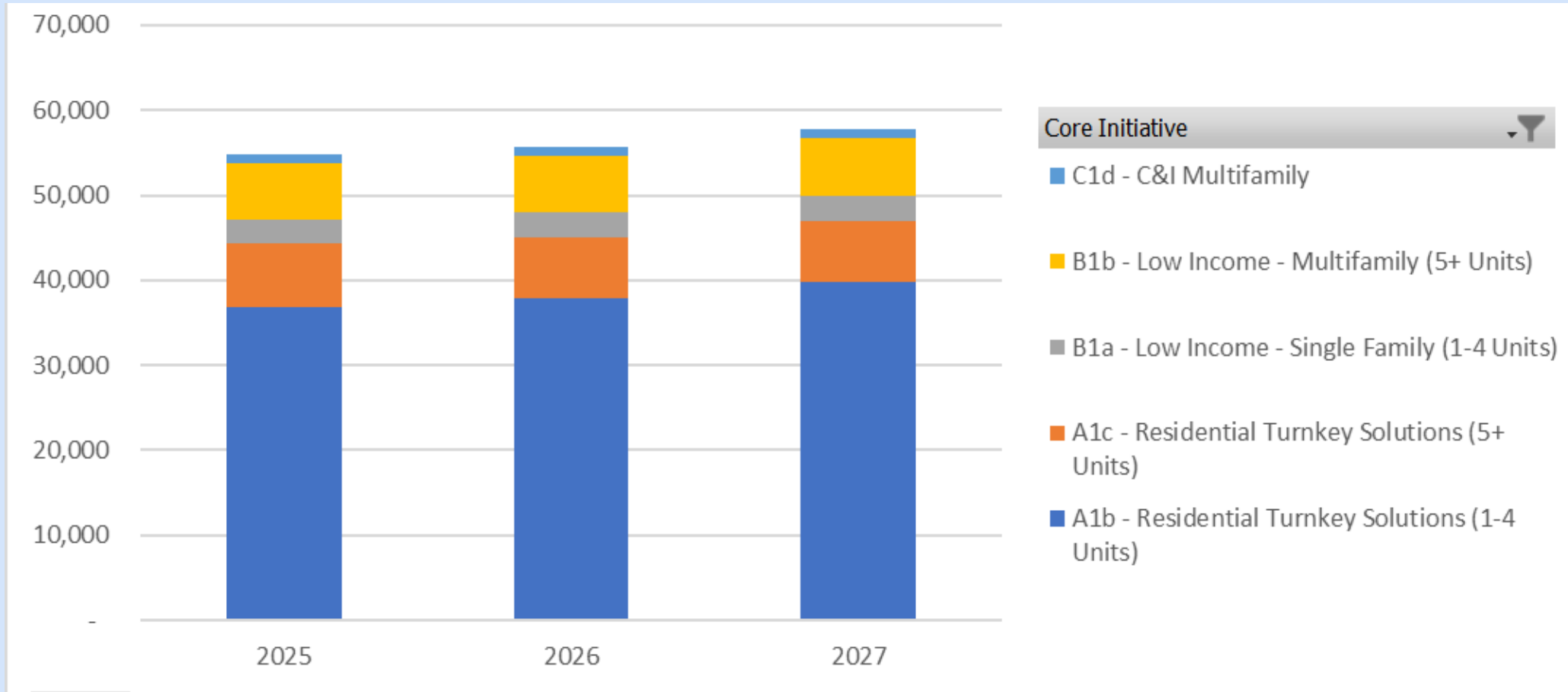
Enhance
Program Access
and
Opportunities
For All



Deliver an
improved
customer
experience

Planned Weatherizations

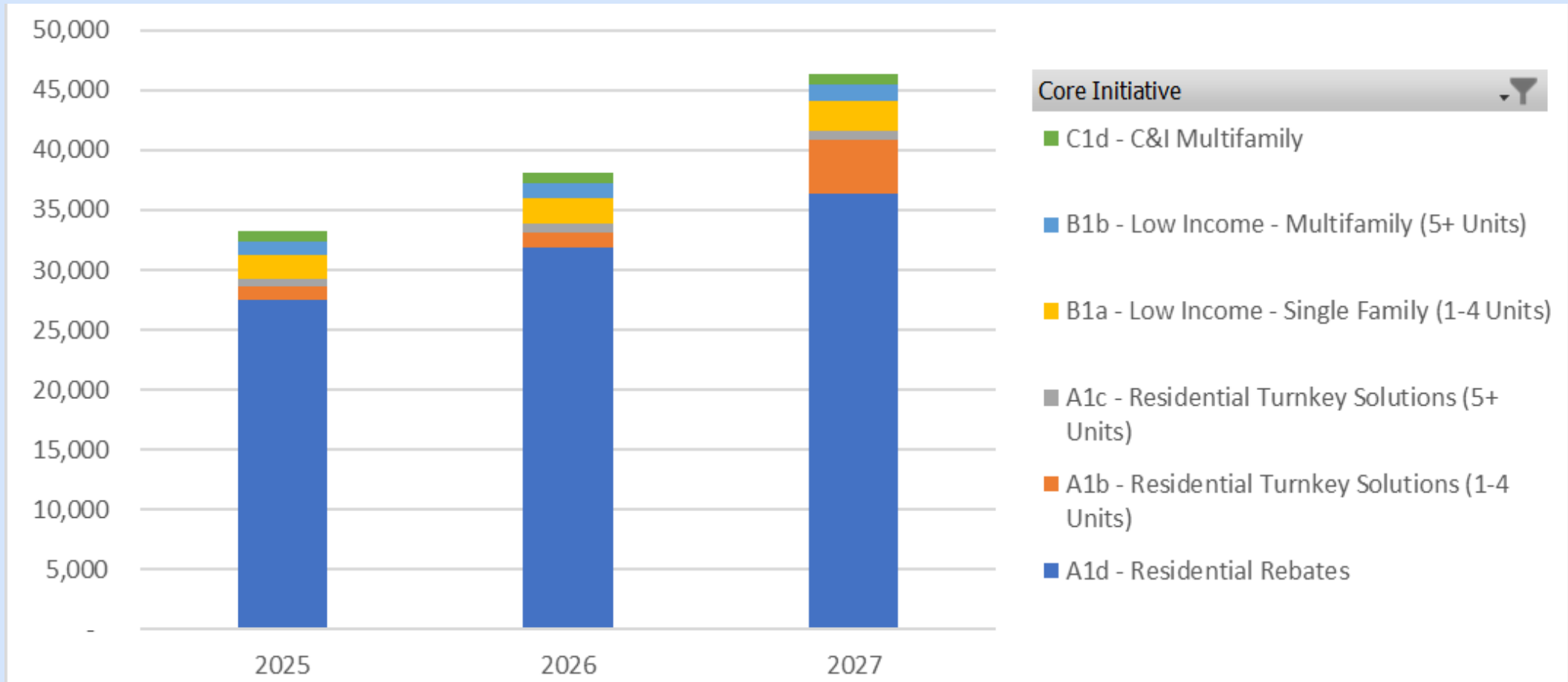
No. of households



We aim to weatherize **174,000** homes in total, including **48,000** low- and moderate-income households.

Planned Heat Pump Installations

No. of households



We aim to support the installation of heat pumps in over **115,000** households, including **16,000** low- and moderate-income households.

Equity Overview

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Enhance Program Access: Moderate- Income Customers

Increase **moderate-income customer participation**
by:

- **Expanding eligibility criteria** to consider both state and area median income and to enable qualified renters to access moderate-income offer;
- **Reduced barriers to qualification** via implementation of self-attestation for weatherization and pursuing data sharing opportunities for instant verification via categorical eligibility
- **Eliminating out-of-pocket costs** for weatherization and electrification and **improving the customer experience** through no-cost weatherization, barrier mitigation, and electrification delivered via a residential “turnkey” model and navigator support

Enhance Program Access: Communities

Increase funding for Community First Partners

Drive **increased weatherization and electrification** of rental units and low- and moderate-income housing in **designated equity communities**

- Automatic qualification for no-cost weatherization for all residents
- Additional funding and specialized approaches for weatherization and electrification of Multi-Family rental properties;
- Building targeting and strategic engagement with community partners, landlords, and other organizations such as MassCEC
- In collaboration with DOER, leverage an additional \$50 million in IRA funding to support electrification of moderate-income customers and barrier mitigation



Summary of Statewide Residential & Low-Income Offers

	Low Income (owner or renter)	Moderate Income (owner or renter)		Market Rate (or not income qualified)	
		Turnkey Pathway	Rebate Pathway	Renter	Owner
Weatherization	100% <i>income verify</i>	100% <i>self-attest</i>	N/A	100%	75%
Barrier Mitigation	100% <i>income verify</i>	100% <i>income verify</i>	N/A	\$5000/unit	\$250 + HEAT Loan
Electrification	100% <i>income verify</i>	100% <i>income verify</i>	up to \$16,000 ASHP, \$25,000 GSHP <i>income verify</i>	\$10,000 whole home; \$2,000/condenser	

Small Business Enhancements

Support **decarbonization** of small businesses by increasing **access**, improving **customer experience**, and expanding the **workforce**

- Expand the Customer Directed Option pathway for customers
- Expand the renters and landlords enhanced offering
- Prioritize support for community-based organizations
 - Up to 100% incentives for charitable non-profits
 - Main Street events
 - Community First Partnership engagement
- Joint PA delivery of the Small Business Initiative



Residential Delivery

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Residential Turnkey Barrier Mitigation & Electrification

This is a new pathway that builds on our existing model for weatherization.



Lead Vendor identifies opportunity for barrier remediation &/or electrification



Lead Vendor discusses recommendations with the customer and assesses interest in moving forward



Lead Vendor identifies appropriate subcontractor, reviews scope of work, and authorizes installation



Lead Vendor oversees installation and provides direct payment to contractor, with no out-of-pocket cost to the moderate-income customer

Decarbonization audits become a new bridge and holistic approach for residential customers

Integrate decarbonization into the Home Energy Assessment

- Expand the HEA scope to include new features like electric panel assessment, battery and EV opportunity, electrification readiness
- Simplify decarbonization through prioritized steps, turnkey solutions, and an engaging, educational customer experience
- Strengthen the connection between weatherization and electrification
- Avoid potential market disruption from competing offerings/objectives



How the HEA will evolve to integrate decarbonization



Vendor/HPC staff training – early 2025

Refocus the narrative and customer education objectives

Expanded data collection requirements – early 2025

New data points to inform recommendations for deeper decarb

New HEA Report – early 2025

More visuals, prioritized next steps, decarbonization theme

Additional decarbonization measures – by 2026

Provide actionable information for EV charging, solar PV, etc.

Interactive decarbonization journey – 2026-2027

Explore digital engagement options for customers long term

Enhance customer education

No cost virtual decarbonization consultations

- Quote comparison
- Project planning
- Continued assistance

Webinars and outreach

Local advocacy training and ongoing advocacy engagement



Optional Pre-Verification

- Provides level of assurance and clarification of expectations prior to installing heat pump and applying for a rebate
- Helps ensure customers understand and comply with each of the required components of a heat pump installation and successful rebate application submission by verifying:
 - Heat pump model(s) are program eligible
 - Incentive level eligible for and expect to receive
- Rebate application will still be required to be submitted after heat pump installation



Customer Experience

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Statewide Contact Center (SWCC) Overview

- Will help support a **full-service experience** by creating a **one-stop-shop** (multi-channel) contact center for customers by consolidating the call center activity to one vendor for all of the various EE programs.
- Will provide customers with a single point of contact with warm hand-offs by trained professionals who can speak to the entire umbrella of offerings we support.



Continue to invest in an improved rebate processing experience

Continue to work with rebate processor to create a faster rebate process

- Reduce number of applications with missing information via enhancements to the online submission portal
- Proactive outreach to customers who are missing information
- Maintain increased staffing levels at rebate processing vendors
- Optimize and reduce time required for inspections, while maintaining appropriate levels of post-install review



Key Dates



EEAC Listening Sessions & Meetings

April-June



EEAC Response to Draft Plan

End of June



All substantive edits to Plan Finalized

Mid-August (45 days after EEAC response)



Final Plan filed with the Department

End of October



Plan Discovery; Plan Order

November-December; February 2025