

# Seeing the Forest **AND** the Trees

Taking a Geographic and Household-Level Approach to Equity

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# Agenda

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How the Sponsors of Mass Save<sup>®</sup> have invested in equity

How we measured the effectiveness of the equity investments

Key takeaways

Looking forward for Mass Save Programs



**Together, we make good happen for Massachusetts.**

Your local electric and natural gas utilities and energy efficiency service provider are taking strides in energy efficiency: Berkshire Gas, Cape Light Compact, Eversource, Liberty, National Grid and Unitil.

As one, we form Mass Save<sup>®</sup>, with the common goal of helping residents and businesses across Massachusetts save money and energy, leading our state to a clean and energy efficient future.

**WE ARE MASS SAVE<sup>®</sup>:**



**We Are Mass Save<sup>®</sup>**

# How the Sponsors of Mass Save have invested in equity

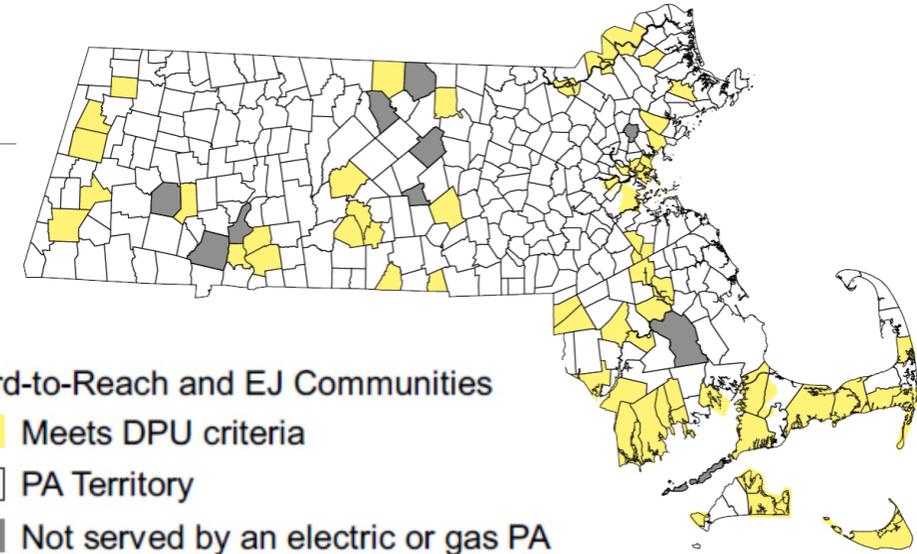
Two major approaches in the 2022-2024 Plan:

## 1. Targeting geographic communities

- Community approach identified 60 towns and 11 zip codes in Boston as underserved communities to target
  - Historically low participation (27% or less, 2013-2017)
  - Contain at least one Environmental Justice (EJ) block group (as defined by the state)
  - Served by an electric or gas Sponsor
- Community First Partnership explores place-based partnerships prioritizing EJ communities and expanding the involvement of community-based organizations

## 2. Targeting customer types

- Increased focus on new strategies to reach renters, moderate-income customers, and English-isolated families.



# How we measured the effectiveness of the equity investments

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# We used participants' addresses to compare targeted communities to their counterparts

We used the participants' service address in tracking data to determine whether they were in the targeted community

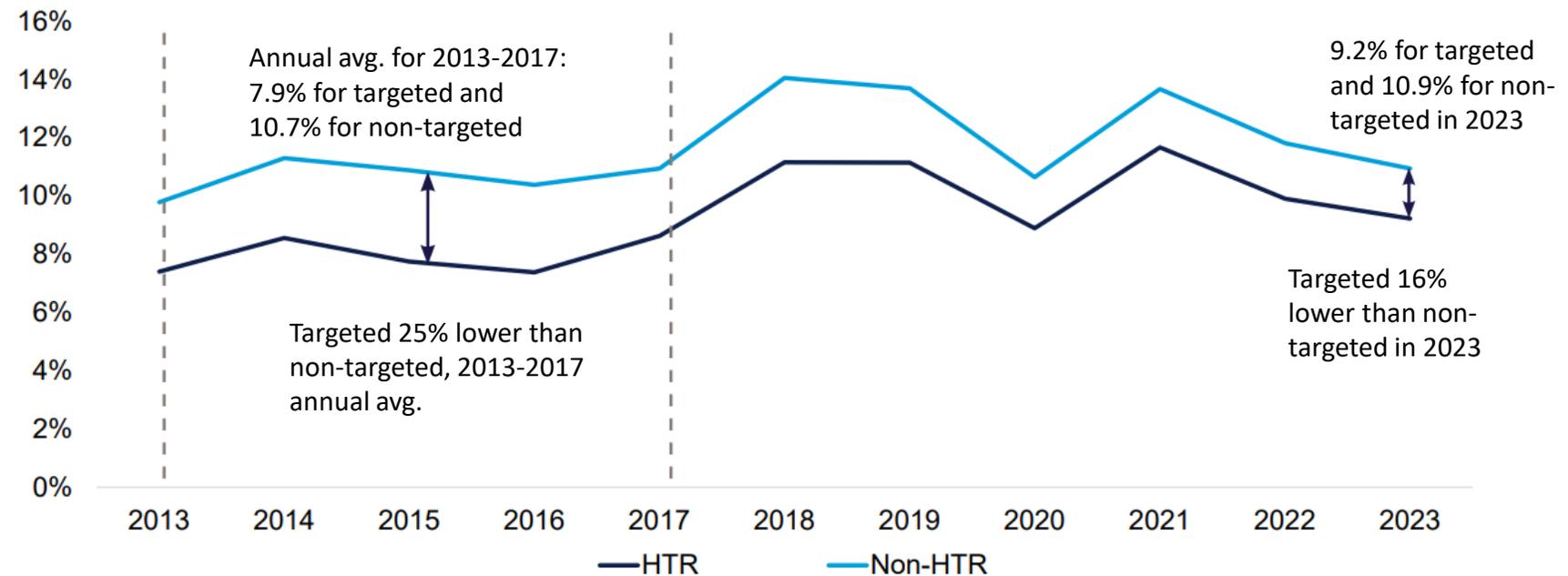


Figure 1. Location participation rate, targeted communities and non-targeted communities

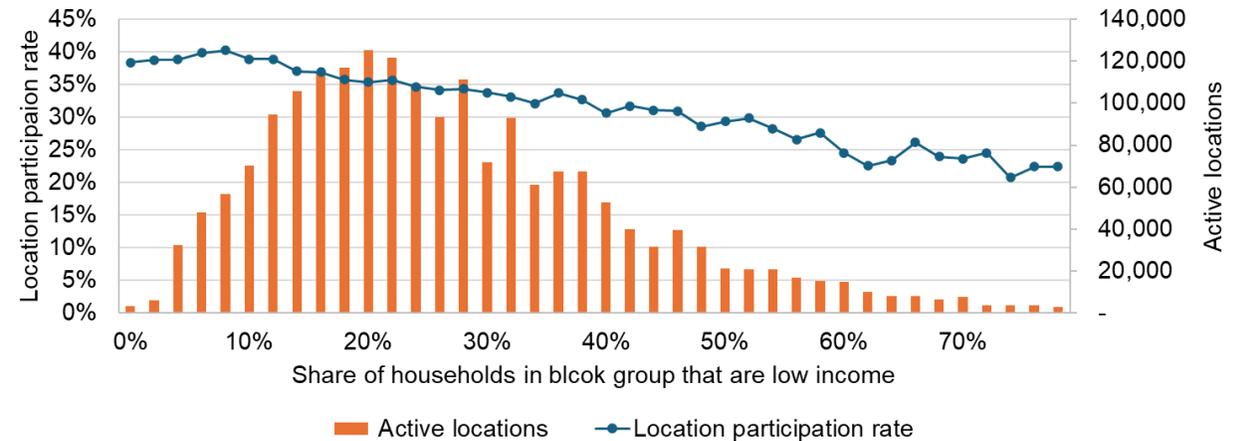
## [2013-2023 Residential Customer Profile Results Brief](#)

▪ **Location participation rate** – Ratio of unique participating locations (primary address) to total unique locations in the population.

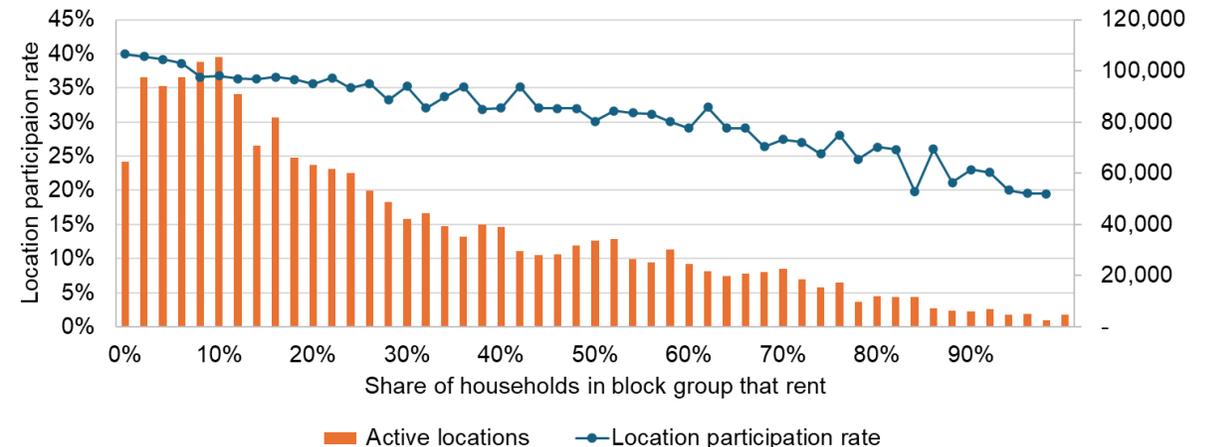
# We used Census block group demographic data to compare customer groups

We used the **participants' service address** in tracking data to determine what **block group** they were in. We then plotted the **participation rate by the concentration of various customer characteristics** (figures to the right show low income and renters)

Participation rate by concentration of low income households



Participation rate by concentration of rented households



# We used household-level data to directly compare customer groups

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We used **utility billing and program tracking data** to determine income at the household level

- Participants flagged by Income Eligible program
- Nonparticipants flagged by rate code

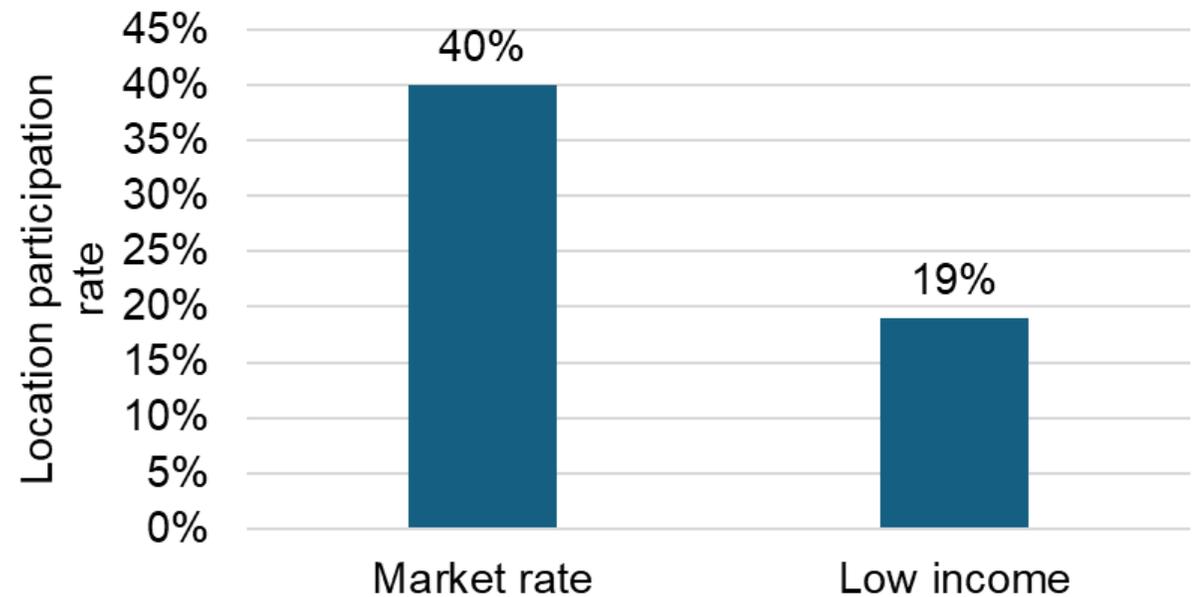


Figure 4. Cumulative location participation rate for low-income vs market rate programs, electric and gas combined, 2019-2022 (2022 RNPS reference)

# Key takeaways

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# Comparing targeted communities to their counterparts does not represent all underserved customers

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## Limitation

## Example



**Underserved customers live outside the targeted communities**

**53% of renters, 53% of low-income, and 58% of moderate-income customers live outside the DPU-designated underserved communities**



**Targeting areas with a higher concentration of a customer characteristic doesn't ensure that customers with that characteristic are being served**

**In DPU-designated underserved communities, only 43% of households are renters, 33% are low income, and 15% are moderate income.**

# Household-level data is best for comparing customer groups; Census data can offer insight when household-level data is unavailable

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## Household-level data

### Benefits

- Provides direct comparison of customer groups

### Limitations

- Not always available

## Census data

### Benefits

- Provides insight into whether groups are underserved
- Easy to repeat for each demographic group

### Limitations

- Requires assumption that lower participation in areas with higher concentration of a customer segment signifies lower participation of that group
- Customer groups with lower concentrations (i.e., moderate income or LOTE) have less pronounced correlation

# Looking forward for Mass Save Programs

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# Building on lessons learned

Equity investment of \$1.78 billion in  
2025-2027 Energy Efficiency and  
Decarbonization Plan

## Importance of targeting geographic communities

The **Community First Partnership** leverages local knowledge and trusted relationships of municipalities and community-based organizations. Up to \$85,500 per year to support an Energy Advocate and local marketing efforts:

- Comprehensive **training** on energy efficiency and electrification
- **Support** from energy efficiency and electrification experts
- Co-branded multilingual **marketing materials**
- **Coaching and best practices** to encourage program participation

## Importance of overcoming limitations of community targeting, by targeting customer types

- \$592 million for **Renters** including no-cost weatherization and enhanced incentives.
- \$1.2 billion in incentives for **low- and moderate-income customers**
  - **Low-income customers** receive comprehensive services designed to reduce their energy burden, delivered through partnerships with local agencies and blended with other funding sources to maintain cost-effectiveness.
  - **Moderate-income customers** benefit from expanded eligibility criteria, simplified income verification, and a facilitated (or “turnkey”) delivery model.
- Customers who prefer to be served in a language other than English (**LOTE**) are offered translated materials, interpreter services, and multilingual staff.

# Thank you!

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## Contact us

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## References

[2013-2020 Residential Nonparticipant Customer Profile Study](#)

[2023 Residential Customer Profile Study Results Brief](#)

[The Massachusetts 2025-2027 Energy Efficiency and Decarbonization Plan](#)