

March 15, 2025

**Mass Save Massachusetts Community First Partnership Agreement
Between
National Grid USA Service Company, Inc and City of Somerville**

1. OVERVIEW

This Mass Save Massachusetts Community First Partnership Agreement dated March 15, 2025 ("Effective Date") to perform Outreach Services to support energy efficiency programs is between National Grid USA Service Company, Inc d/b/a "National Grid" ("Sponsor") and the City of Somerville ("Community Partner Team" or "CPT"):

2. DEFINITIONS:

All capitalized terms used herein, or elsewhere in the Agreement, shall have the meanings ascribed to them in this Article 2, unless such terms are otherwise defined in the Agreement. The terms "include(s)", "included" and "including" are used without limitation.

- A. **"Agreement"**: This Mass Save Massachusetts Community First Partnership ("CFP") agreement between Sponsor and CPT.
- B. **"Community First Partnership" or "CFP"**: This is the Mass Save Massachusetts Community First Partnership.
- C. **"Community Partner Team" or "CPT"**: Municipality(ies) or registered nonprofit(s), acting directly or through an agent. *Applicants representing multiple municipalities and/or nonprofits must designate a lead municipality/nonprofit that will receive disbursements of funds.* The community partner entity(ies), acting through the CPT Representative(s), providing Outreach Services as follows:
 - City of Somerville
- D. **"CPT Representative"**: The individual(s) identified by the CPT acceptable to Sponsor to serve as the CPT lead and energy advocate for the Term of this Agreement, who may be modified from time to time by mutual agreement of the parties, with the roles and responsibilities set forth in Article 4. As of the effective date of this Agreement, the CPT Representative and contact information is set forth in Article 5.
- E. **"Coordinator"**: The Community First Program coordinator designated by Sponsor, which may be modified from time to time by Sponsor. As of the effective date of this Agreement, the Coordinator and contact information is set forth in Article 5 Notices.
- F. **"Outreach Services"**: The services to be performed by the CPT under this Agreement to increase participation in Programs, as described in Article 3.
- G. **"Programs"**: The energy efficiency programs for energy efficiency services that benefit customers, such as Home Energy Assessments, weatherization upgrades, and heating and cooling upgrades; as described in Exhibit A.
- H. **"Priority Groups"**: Priority groups for Outreach Services identified in CPT's application, as approved by Sponsor that may include any of the following:
 - a. landlords of 1 – 4 unit buildings, to benefit renters;
 - b. landlords of 5+ unit buildings, to benefit renters;
 - c. low-income customers (renters and non-renters);
 - d. moderate-income customers (renters and non-renters);

- e. customers who prefer to be served in a language other than English and speaks, reads, writes, and understands Languages Other Than English ("LOTE") and has a language access need. *The Plan utilizes "LOTE customer" throughout in lieu of the previously used terms of non-English speakers, English-isolated customers, and Limited English Proficiency;*
 - f. small businesses.
 - g. For Community Partner Teams planning outreach in DEC's (defined in Exhibit A), one of these priority populations is required to be owners and managers of 5+ unit buildings.
- I. **"Sponsor":** "National Grid USA Service Company, Inc d/b/a "National Grid"
 - J. **"CFP Lead Vendor":** The competitively procured corporation managing day-to-day CFP operations on behalf of the Mass Save Sponsors.

3. SCOPE OF SERVICES

- A. **Outreach Services:** In consideration for the Award, the Community Partner Team agrees to work with Sponsor and Coordinator to increase the participation of Priority Groups in the Mass Save Programs, by performing the Outreach Services set forth in the CFP Application submitted by CPT, as modified by Goals Workplan for the CPT ("Workplan") and in this Agreement ("Outreach Services") including, at a minimum, the following activities:
 - a. **CPT Representative:** Identifying a CPT representative acceptable to Sponsor ("CPT Representative");
 - b. **Orientation/Training:** CPT Representative participation in Sponsor's orientation and training sessions on energy efficiency and decarbonization services offered through the Mass Save programs, including incentives available to income eligible customers and how to best ensure that income-eligible customers connect to energy efficiency programs, considering community-based social marketing, and community-based participatory research.
 - c. **Meeting Participation:** Attendance and participation in Community First Partnership with Sponsor and Coordinator meetings (a minimum of monthly meetings is required);
 - d. **Program Promotion Material Review:** Working with Sponsor's designated CFP Coordinator to review Program marketing and promotion materials in a timely fashion;
 - e. **Co-Branding Materials:** Community Partner Team hereby authorizes Sponsor to add the Community Partner Team brand/logo/city/town municipal seal to Program materials circulated to customers by mail, electronically or otherwise.
 - f. **Program Materials Circulation/Mailings:** As requested by Sponsor and Coordinator, circulating CFP Program materials provided to the Community Partner Team by the Sponsor's Coordinator for insertion in bills and other mailings and communications to customers in the CPT communities, co-branded and co-signed, as appropriate.
 - g. **Marketing:** CPT marketing activities, include any of the following: hosting or attending events, delivering presentations, workshops, or webinars, training partner organizations in outreach and customer intake, small business Main Streets canvassing, social media posts, ads, sending direct mail, publishing articles, posting videos, informational flyers dispersed in schools, etc.
 - h. **Other Communications:** Identifying opportunities and facilitating circulation of Program Materials, co-branded as appropriate, in other municipal/city/town programs and communication channels.
 - i. **Information/Reporting:** Providing information requested by Coordinator regarding the outreach services performed by the CPT on a timely basis for inclusion in Coordinator reports to Sponsor and required reports as further described in **Exhibit B**; and
 - j. **Invoicing:** The Community Partner Team shall invoice Sponsor for the Award in accordance with Section 3 (C) and **Exhibit B**.

B. Term, Noncompliance and Termination:

- a. Term: The term of this Agreement shall be three (3) years from March 15, 2025, to March 14, 2028, unless earlier terminated in accordance with the Agreement.
- b. In the event of any noncompliance with this Agreement, the affected Party shall notify the noncompliant Party in writing with details regarding the default and corrective action requested. The noncomplying party shall complete such corrective action within ten (10) days of receipt of such written notification, or such other period, as may be requested by the noncompliant Party and agreed to by the notifying Party. Either Party may terminate this Agreement if it has sent written notice to the noncompliant Party of its default and the noncompliant Party has failed to cure the default within ten (10) days written notice of receiving the notice of the default. The written notice must also be provided to all the Community Partner Team members listed in Section 2, Definition C. Further, in addition, the Sponsor rights set forth below in Section B (c), if the Sponsor determines The Community Partnership Team is not demonstrating a good faith effort to reach the participation requirements as outlined throughout the document, the Sponsor may terminate this Agreement upon written notice to the CPT Representative.
- c. The Sponsors may, in their sole discretion, with or without reason, at any time and without advance notice, terminate this Agreement and a Community Partner Team member's participation under this Agreement, by written notice to the CPT Representative. For the avoidance of doubt, this termination right includes, without limitation, the right to terminate in response to any regulatory or statutory changes to the Mass Save programs.
- d. Notwithstanding anything to the contrary herein, Agreement terms, requirements, and eligibility may be terminated, canceled, or modified by Sponsor at any time without notice.

C. Award:

- a. **Award:** In consideration for the Outreach Services to be performed by the Community Partner Team in compliance with this Agreement and the Workplan, Sponsor will provide an annual award of \$6,134.06 and a total award of \$18,402.18 over the Term, subject to the terms of this Agreement ("Award"). **Note:** Award funding is dependent on CPT compliance and the Department of Public Utilities' approval of the Massachusetts 2025 – 2027 Energy Efficiency and Decarbonization Plan.
- b. **Invoicing:**
 - i. CPT shall provide the Sponsor with requested information for Award payment, and Sponsor will establish an Authorization for Payment ("AFP") with CPT. *Note for National Grid Only: Payments will be disbursed via the CFP Lead Vendor.*
 - ii. Invoices should be submitted using the invoice template and must include the following:
 1. Invoice Number
 2. Prepared By
 3. Date
 4. Project: Mass Save Community First Partnership
 5. Projected Expenses (e.g. Invoice 1 would have projected expenses for March 15 – September 15)
 6. Total Amount
 7. Information on Payment Remittance

8. Vendor Number issued by Sponsor, if required

- iii. Subject to CPT's compliance with the Agreement, Sponsor shall pay properly invoiced amounts within 60 days of invoice receipt. Sponsor reserves its right to modify Award payments based on CPT performance, Agreement compliance, conduct and standing, budgetary surplus, and any regulatory or other governmental changes.
- iv. Sponsor shall make payment to the City of Somerville or such other entity designated in writing by the City of Somerville, who will be solely responsible for all further disbursement of Award amounts to any other CPT members.
- v. CPT shall submit invoices periodically per Exhibit B as follows:
 - 1. Invoice 1 is 50% of annual Award, minus any award surplus adjustments from the previous year. If award surpluses exceed the total value of invoice 1, adjustments will be made on subsequent invoices.
 - 2. Invoice 2 is 25% of annual Award
 - 3. Invoice 3 is 25% of annual Award
- c. **Award Funds Use:** The Community Partner Team shall apply the Award funds solely for resources and activities performing the Outreach Services. Specific guidelines on acceptable uses of funds will be provided during the Orientation process. Any unused Award funds shall be returned to Sponsor. The CPT Representative will be solely responsible for ensuring funds are used for any approved expenses and that funds are used within the Term period. By way of example, if the final expense reports of 2025 and 2026 predict an end of year surplus over 20%, a reduced, prorated award amount may be determined for the following year, and the CPT must spend the entirety of its total 25-27 award amount by March 14, 2028. Sponsors may require the return of any unused award funds at the end of the 25-27 plan.

4. ROLES AND RESPONSIBILITIES

A. SPONSOR /COORDINATOR ROLES AND RESPONSIBILITIES

Sponsor and/or Coordinator will provide the Community Partner Team with the following:

- a. A designated point of contact for both gas and electric services Sponsors for the CPT communities and Coordinator to assist the CPT in reaching program goals.
- b. A baseline report for the period of 2023 tracking community-wide customer participation, and Priority Population participation when available, in Programs for each CPT municipality.
- c. Monthly municipal-level progress on goals.
- d. Orientation/Training sessions to orient Community Partner Teams on energy efficiency, electrification and decarbonization offerings, including Programs and incentives available to eligible customers and opportunities to facilitate enrollment of such customers in Programs.
- e. Cross-community learning sessions.
- f. Regularly scheduled meetings (at least monthly) to provide guidance and deliberate on program performance and opportunities for growth.
- g. Turnkey mailer campaigns (e.g. letters and bill inserts) designed, printed, and mailed by the Sponsors, and select tabling materials (e.g. tabling displays and giveaways) designed and provided by the Sponsor, both at no-cost.
- h. A community-focused, multilingual automated phone line and webpage on MassSave.com guiding residents and small businesses to sign up for Mass Save programs.

- i. Translation of turnkey materials and select locally customized materials into up to 3 languages per Community Partner Team.
- j. Marketing material support to help the communities outreach efforts. All marketing items must comply with Sponsor marketing guidelines and approved prior to use.

B. COMMUNITY PARTNER TEAM/ REPRESENTATIVE ROLES AND RESPONSIBILITIES

The Community Partner Team shall perform the following roles and responsibilities:

- a. Performing Outreach Services diligently and continuously for the Term of the Agreement in accordance with a CFP Goals Workplan to be developed by the CPT, Coordinator and Sponsor within three (3) months of the Effective Date and revised from time to time by mutual agreement of the Parties, executing a continuous campaign to reach the at least two (2) of the specified Priority Groups to achieve a measurable increase in Program participation.
 - b. Provide documentation to the Coordinator demonstrating and tracking CPT Outreach Services activities, CPT engagement with other community groups and organizations and CPT's innovative strategies and initiatives to engage eligible customers.
 - c. Ensuring CPT Representative's performance of the following responsibilities, including:
 - i. serving as a Community Partnership Team Lead and Energy Advocate to execute Outreach Activities;
 - ii. providing regular updates on CPT decisions and activities described in the CFP Goals Workplan;
 - iii. responding to inquiries related to this Agreement and CPT administration, budget/award payments, marketing needs, etc.,
 - iv. dedicating at least the hours per week set forth in the CFP Application submitted by CPT, as modified by Budget and Outreach Plans, to Program responsibilities;
 - v. attending and participating in Sponsor/Coordinator trainings and meetings and the development of the CFP Goals Workplan;
 - vi. Managing CPT responsibilities supporting the outreach and marketing campaign activities to Priority Groups and collaborating across a diverse group of partners.
 - vii. submitting all marketing materials that will be used for Outreach Services for Sponsor/Coordinator review and prior written approval before finalizing and use.
 - viii. actively communicating with customers to guide them through the application process and broker communication with stakeholders to reduce program participation barriers.
 - ix. tracking and recording participation barriers.
 - x. submitting on-time reports as required and further described in **Exhibit B**, containing information and metrics relating to items (a) and (b) above, reflecting increases in customer engagement and participation in energy efficiency programs following CPT outreach activities.
 - d. Complying with all applicable laws related to this Agreement and customer protections, including:
 - i. Members of the CPT, including the CPT Representative, shall not enter into customer residences or facilities without having satisfied Sponsor criminal background check requirements.
 - ii. The CPT must sign a Non-Disclosure Agreement (NDA) to protect customer information and the CPT Representative and all Community Partner Team members who will be accessing customer information via the Salesforce Database must sign a Data Use Agreement.
5. **NOTICES:** All notices, demands, and other communications hereunder shall be sent by U.S. First Class Mail, return receipt requested, or via overnight delivery. Notice will be deemed acceptable if

sent via electronic mail (e-mail) if followed by formal written notice in accordance with this Section. Notices shall be delivered to the appropriate financial, administrative and/or technical party(ies) as identified below, unless notice of change of contact or address is provided in writing to the other.

Sponsor Coordinator

Name: John Massie
Title: Lead Program Manager
Email: John.Massie@nationalgrid.com
Phone Number: 781-910-8521

Community Partner Team Representative

Name: Garrett Anderson
Title: Residential Decarbonization Program Manager
Email: ganderson@somerville.gov
Phone Number: 857-270-4403

6. CONFIDENTIALITY AGREEMENT;

The Community Partner Team acknowledges that the Sponsor or customers may disclose information to the Community Partner Team or CPT Representative in connection with this Agreement. The Community Partner Team agrees that it will execute and deliver to the Sponsor the Sponsor's form of Non-Disclosure and Data Use Agreement (the "NDA") simultaneously with the execution and delivery of this Agreement and that the CPT Representative shall also sign a Data Use Agreement if they are accessing confidential customer information. The Community Partner Team acknowledges that this Agreement is not effective until the NDA has been executed and delivered by the Community Partner Team to the Sponsor.

7. MISCELLANEOUS

This Agreement shall be interpreted under the laws of Massachusetts, and any action in any way related to this Agreement may only be brought in the state courts of Massachusetts. Paragraph headings are for convenience only and do not affect, limit, or modify the content of the provisions of this Agreement. Use of the masculine, feminine, neutral singular, or plural pronouns shall not limit the application of any provision of this Agreement. The parties expressly disclaim the creation of any right in any third party whatsoever under this Agreement, there are no third-party beneficiaries. The only parties who may enforce this Agreement, and who have any rights under this Agreement, are the parties to this Agreement, who shall comply with all requirements of all laws, orders, ordinances, and regulations of the federal, state, and municipal authorities.

If any section, sentence, paragraph, term, or provision of this Agreement is determined to be illegal, invalid, or unconstitutional, by any court of competent jurisdiction or by any State or Federal regulatory agency having jurisdiction thereof, such determination shall not affect the validity of any other section, sentence, paragraph, term or provision hereof, all of which shall remain in full force and effect for the term of this Agreement. This Agreement constitutes the entire and complete agreement between the parties hereto concerning the subject matter hereof and shall supersede all prior agreements or understandings. In the event of a conflict, the terms of this Agreement shall take precedence over any other contract or document involving the parties hereto, including any exhibits. This Agreement can be amended only by a written agreement between the parties. The use of the terms "partner" and "partnership" notwithstanding, neither Community First Partnership nor the Community Partner Team is an agent, partner, or joint venturer of Sponsor, its parent, or any subsidiary or affiliate.

IN WITNESS WHEREOF, this Agreement has been executed by duly authorized representatives of the Parties as of the date first above written.

Community First Partnership Team Representative, as agent for the Community Partner Team

The Community Partner Team: City of Somerville

Name: Katjana Ballantyne

Signature: 

Title: Mayor of Somerville

Date: 4/10/2025

Program Administrator Representative

National Grid Procurement

Name: _____

Signature: _____

Title: _____

Date: _____

Program Administrator Representative

National Grid Business

Name: _____

Signature: _____

Title: _____

Date: _____

Exhibit A

Overview

As part of the Mass Save Program Administrators' ("PAs") Massachusetts 2025-2027 Energy Efficiency and Decarbonization Plan ("Plan"), equity remains a foundational principle of the PAs' decarbonization efforts. In the Plan, the PAs expand on the commitment to equity and incorporate distributive justice as a key element of program design and implementation. In the context of the decarbonization and energy efficiency services provided through the Mass Save programs, the Plan defines 'distributive justice' as a commitment to promoting fair and equitable distribution of benefits and burdens across all customers, upholding and prioritizing the needs of historically underserved customers burdened with economic challenges, racial inequality, negative environmental impacts, and justice disparities. The Plan further outlines the PAs' commitment to reaching residents and businesses with energy efficiency services especially in the Designated Equity Communities ("DECs") included in the Plan and among priority groups across the Commonwealth who have historically participated at lower rates, including renters/landlords, low- and moderate-income customers, customers who prefer to be served in a language other than English ("LOTE customers"¹), 5+ unit buildings, and small businesses.

The PAs strive to leverage such relationships with communities to contribute to the achievement of these critical priorities. As part of the PAs' 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 serving customers who have not participated in energy efficiency programs and who need targeted approaches to increase access and participation in energy efficiency programs through the Mass Save Community First Partnership ("the Partnership").

The objective of the Partnership is to leverage the local knowledge and trusted relationships within identified communities to prioritize these partnerships to increase engagement with communities, and reach low to moderate-income customers, renters, landlords, LOTE customers, 5+ unit buildings, and small businesses to provide access to and ensure participation in Mass Save programs. The Partnership's focus includes a flexible design to encourage innovative proposals and align goals, data, and outcomes shared between the PAs and community partners.

As a Community First Partner, the Community Partner Team must plan and execute up to 36 months of program activity including public education and outreach, such as marketing and/or participation in local events to drive measurable uptake in residential weatherization, residential heating system upgrades and Small Business Turnkey program participation through the following Mass Save programs:

Low Income Program

Through the Low-Income program, the PAs provide a comprehensive set of energy efficiency services designed to enable low-income residential customers to pursue improvements to their homes that reduce their energy burden and environmental impact. Ensuring access to program benefits for low-income customers has been a core focus of the Low-Income sector since its inception. The Low-Income program is structured around the PAs' partnership with LEAN, the group of local CAP agencies delivering low-income energy services in Massachusetts and is designed to leverage federal Low-Income Home Energy Assistance Program ("LIHEAP"), WAP, and HEARTWAP funding.

Low-Income Single-Family Pathway - In the Low-Income Single-Family pathway, CAP agencies and select vendors (managed by Low-Income Implementation Lead Vendors) deliver in-home energy assessments to low-income residential customers living in 1-to-4 unit buildings. These assessors evaluate the home for weatherization opportunities, mechanical system upgrades, general energy efficiency, and (for electric PAs only) appliance upgrade opportunities.

Low-Income Multifamily Pathway - In the Low-Income Multifamily pathway, the program provides low-income customers living in 5+ unit multifamily buildings (in which at least 50 percent of the units are low income) with a whole building and in-unit assessment and fully facilitated project scope that targets both electric and natural gas end uses.

Eligibility:

- Customers with a household income at or below 60% SMI and living in single-family (1-to-4 units) residential buildings are eligible for program services through the Single-Family pathway.
- Residents in multifamily buildings with 5+ units where at least 50 percent of the units are occupied by residents whose household income is at or below 60% AMI (area median income) are eligible for program services through the Multifamily pathway.

Customers who demonstrate eligibility for the utility discount rate automatically qualify for the Low-Income program. Program eligibility can also be demonstrated if the customer qualifies for LIHEAP or other means-tested programs such as Supplemental Security Income, Transitional Aid to Families with Dependent Children, Emergency Aid to the Elderly, Disabled, and Children, and/or food stamps.

2025-2027 Priorities

In 2025-2027, the PAs and LEAN are committing to installing more than 16,000 heat pumps through the Low-Income program, with a prioritized focus on customers heating with delivered fuels and electric resistance. This target represents approximately 50 percent year-over-year growth in low-income heat pump installations during the term and will require significant additional investment in weatherization and barrier mitigation to make these homes electrification-ready. The PAs and their partner CAPs aim to weatherize more than 42,000 low-income homes in support of these efforts to ensure maximum savings and health and safety benefits for customers.

Residential Turnkey Solutions program

The Mass Save Residential Turnkey Solutions program promotes energy efficiency and decarbonization opportunities for all residential end use buildings including single family and small/medium/large multifamily buildings. The PAs will leverage the assessment to collect additional data points on the home to identify, recommend, and facilitate relevant decarbonization options based on the customer's opportunities and needs. The enhanced assessments will evaluate the site-specific readiness and suitability (e.g., electrical service and panel capacity) for implementation of measures such as heat pumps, electric appliances, electric vehicle ("EV") charging. By evaluating these additional areas and discussing decarbonization measures broadly, the Home Energy Assessment will provide the information necessary to support the customer with decarbonization options that match their interest and need. Through the Home Energy Assessment Report, the PAs can assist with the connection to appropriate resources to support customers in taking action over the course of their decarbonization journey.

To streamline the customer experience and reduce barriers to participation, the PAs are expanding the managed (or "turnkey") services within the Residential Turnkey Solutions program beyond weatherization to provide barrier mitigation and heat pump installations, starting first with moderate-income homeowners and renters. The customer's experience begins with their Home Energy Assessment from a trusted vendor and proceeds to end-to-end project facilitation where work is provided to the customer at set pricing, customers receive instant incentives, subcontractors are assigned and managed by the vendor (or can be selected by the customer), and finally, the program offers quality control inspections post-installation to ensure all materials were installed according to the work scope and up to the program's installation standards. Vendors providing turnkey services remain a resource for customers considering further home improvements, even after turnkey installations are complete.

www.masssave.com/en/saving/energy-assessments/homeowners
www.masssave.com/en/residential/for-renters
www.masssave.com/saving/income-based-offers
www.masssave.com/multi-family/energy-assessments/multi-family-facilities-5-units-plus

Residential Rebates Program

The Residential Rebates Program provides a broad integrated marketplace where energy-efficient products and equipment are positioned as attractive, primary choices for customers making purchasing decisions, whether online, in-store, or through independent contractors and distributors. The program offers education to help customers make informed decisions, incentives to make efficient choices more financially attractive, and training and support for the market actors, to help shift contractors toward more efficient, properly installed equipment.

One of the primary objectives of the Residential Rebates program is to encourage residential customers and plumbing, electrical, and HVAC contractors to electrify homes in Massachusetts while purchasing and installing the most efficient HVAC and water heating technologies. There are eligibility requirements that vary by measure. Rebates are offered via this program for a variety of energy-efficient measures. These include HVAC, domestic hot water, products, appliances, and appliance recycling.

www.masssave.com/en/saving/residential-rebates

Small Business Turnkey Retrofit Program

The Small Business Turnkey Retrofit Program is open to commercial (including non-profit and Houses of Worship) customers using less than 1.5 million kWh in electricity or 40,000 therms of natural gas per year. The program offers a comprehensive, no-cost on-site energy assessment. Small business customers receive a site-specific proposal with recommended energy efficiency measures that may include any cost-effective energy efficiency or decarbonization opportunities. Some examples include:

- Lighting and controls
- Insulation and air sealing
- Variable frequency drives
- Compressed air measures, including leak detection/repair
- Instant Savings Measures like faucet aerators, spray valves, and thermostats
- Smart power strips
- Heat Pumps
- HVAC controls
- Steam traps
- Energy efficient transformers
- Custom equipment tailored to a specific process
- Refrigeration efficiency measures
- Kitchen/lab hoods

The Small Business Turnkey Retrofit program covers all aspects of a project, including the assessment, scoping, purchasing, permitting, installation, cleanup, and warranty services. Massachusetts PAs will cover the majority of the project costs (incentives vary based on measure type and customer type) and may offer financing to help customers cover any cost share.

Customers are also able to access incentives using their own contractor, through two different pathways:

- **Customer Directed Option (CDO):** Customers work with their contractor. The PA's CDO Lead Vendor helps the contractor organize the incentive proposal, submits on their behalf, and handles all incentive administration at no cost to the customer.
- **Instant Incentives:** Customers or their contractors can work with participating distributors to have their incentive applied directly to the sale price of their eligible equipment. Some of the available

instant incentives include electric food service & refrigeration equipment, lighting controls, select HVAC equipment and pumps, heat pump water heaters and cold storage & lab grade equipment.

www.MassSave.com/SmallBusiness

Exhibit B: Reporting Requirements and Deadlines for Required Reports and Documentation

Monthly Reporting Requirements

- Outreach progress summary including data collection on the number of residents in each target group being reached.
- Identification of barriers to participation in each municipality and progress made toward breaking those barriers over multiple years.
- Number of customer leads – Community Partner Team will be expected to track the names and contact information of 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 Community Partner Team is engaging and how often.
- Number of property owners of rental buildings generated as leads in 1-4 unit buildings.
- Number of property owners of rental buildings generated as leads in 5+ unit buildings.
- If applicants do not meet the goals established by year one, Sponsor will review their performance and identify if there is a need for an enhanced activity plan ("EAP"). This will focus on increasing program enrollment and requires a review of the budget to assess the best use of funds for the remainder of the initiative.

Periodic Reporting Requirements:

- Two (2) expense reports annually using a template provided by the Sponsors. All expenses must be itemized, with receipts for non-salary expenses over \$350. All other receipts should be available upon request. The end of year report must include projected expenses through the end of the year.
- City of Somerville will be responsible for providing National Grid the necessary documentation for payment, including invoices with the required information. See Section 6 for details.
- Must inform National Grid or their designee of planned door-to-door outreach on behalf of the Partnership and ensure that all paid and unpaid staff participating in door-to-door outreach have complied with National Grid's criminal background check process and the relevant city or town canvassing ordinances.

Annual Reporting Requirements:

- Submit final report on progress at the end of the year. National Grid reserves the right to work with the applicant team to adjust their goals and award amount if necessary.
- Complete survey on the Community Partner Team's experience in the Partnership.
- Submit an updated budget plan for each program year, outlining the planned uses of the annual award funding. The cost to compensate an Energy Advocate is recommended to be at least \$30/hour. Energy Advocate wages must be included as a component of the budget.
- Must submit an outreach and marketing plan for the first year and then annually each following year.
- Submit a complete report of funds spent at the end of the three-year term OR if Community Partner Team exits the program before the end of the Term. Return of excess funds may be required.
- A final expense report documenting all funds spent over the three-year award period will be due in April of 2028, or upon a community's early exit from the program. Final expense reports must include an itemized summary of annual expenses, including previously unsubmitted receipts for any non-salary expenses that are \$350 and over.

Community Teams are required to follow the schedules below to submit required reports each year to the Sponsors. The templates and instructions for submitting each report will be provided by the Sponsors.

2025

Required Report	Deadline to Submit	Description
Invoice 1	May be submitted starting Mar. 15, 2025. Must be submitted within 14 business days of MOA being signed by all parties	Invoice to Sponsor requesting payment of 50% of 2025 annual award. Invoice must detail expected use of funds. Will not be paid until MOA is signed.
Budget Plan for Year 1	May 15, 2025	Updated budget plan reflecting how award will be spent Mar. 15, 2025 – Mar. 14, 2026
Outreach Plan for Year 1	May 15, 2025	Updated outreach plan reflecting strategies for Mar. 15, 2025 – Mar. 14, 2026
Invoice 2	August 1, 2025	Invoice to Sponsor requesting payment of 25% of 2025 annual award. Invoice must detail expected use of funds.
Expense Report 1	July 15, 2025	Details of spending between March 15- June 30, 2025. Must include receipts for expenses over \$350.
Invoice 3	Nov 1, 2025	Invoice to Sponsor requesting payment of 25% of 2025 annual award. Invoice must detail expected use of funds.

2026

Required Report	Deadline to Submit	Description
Expense Report 2	Jan 7, 2026	Details of spending between July 1 – Dec 31, 2025, plus projected spending for Jan 1 – Mar 14, 2026. Must include receipts for expenses over \$350 from July 1 - Dec 31, 2025.
Annual Community Impact Report 1	Jan. 31, 2026	Narrative description of community team's work and impact for Mar. 15, 2025 – Dec. 31, 2026, including stories, photos, media links, and lessons learned.
Budget Plan for Year 2	Jan. 7, 2026	Plan for how Community Team intends to use the year 2 award funds (Mar 15, 2026 – Mar. 14, 2027)
Outreach Plan for Year 2	Jan 7, 2026	Plan for how Community Team intends to do outreach in year 2 (Mar 15, 2026 – Mar. 14, 2027)

Invoice 4	Feb. 1, 2026	Invoice to Sponsor requesting payment of 50% of 2026 annual award. Invoice must detail expected use of funds.
Invoice 5	Aug 1, 2026	Invoice to Sponsor requesting payment of 25% of 2026 annual award. Invoice must detail expected use of funds.
Expense Report 3	July 15, 2026	Details of spending between Jan 1, 2026 – June 30, 2026. Must include receipts for expenses over \$350 for this period.
Invoice 6	Nov 1, 2026	Invoice to Sponsor requesting payment of 25% of 2026 annual award. Invoice must detail expected use of funds.

2027

Required Report	Deadline to Submit	Description
Expense Report 4	Jan 7, 2026	Details of spending between July 1 – Dec 31, 2026, plus projected spending for Jan 1 – Mar 14, 2026. Must include receipts for expenses over \$350 from July 1 - Dec 31, 2026.
Annual Community Impact Report 2	Jan. 31, 2027	Narrative description of community team's work and impact for Jan. 1, 2026 – Dec. 31, 2026, including stories, photos, media links, and lessons learned.
Invoice 7	Feb.1, 2027	Invoice to Sponsor requesting payment of 50% of 2027 annual award. Invoice must detail expected use of funds.
Budget Plan for Year 3	Jan. 7, 2027	Plan for how Community Team intends to use the year 2 award funds (Mar 15, 2027 – Mar. 14, 2028)
Outreach Plan for Year 3	Jan. 7, 2027	Plan for how Community Team intends to do outreach in year 2 (Mar 15, 2027 – Mar. 14, 2028)
Invoice 8	Aug 1, 2027	Invoice to Sponsor requesting payment of 25% of 2027 annual award. Invoice must detail expected use of funds.
Expense Report 5	July 15, 2027	Details of spending between Jan 1, 2026 - June 30, 2027. Must include receipts for expenses over \$350 for this period.
Invoice 9	Nov 1, 2027	Invoice to Sponsor requesting payment of 25% of 2027 annual award. Invoice must detail expected use of funds.

Expense Report 6	Jan. 7, 2028	Details of spending between July 1 - Dec 31, 2027, plus projected spending for Jan 1 – Mar. 14, 2028. Must include receipts for expenses over \$350 for this period.
Annual Community Impact Report 3	Jan 31, 2028	Narrative description of community team's work and impact from Jan. 1 - Dec. 31, 2027, including stories, photos, media links, and lessons learned.
Final Community Impact Report	Apr 1, 2028	Narrative description of community team's work and impact from Mar 15, 2025 – Mar 14, 2028; including stories, photos, media links, and lessons learned.
Expense Report 7	April 1, 2028	Summary of expenses from Mar 15, 2025 – Mar 15, 2028. Must include receipts for expenses over \$350 for Jan 1 – Mar 15, 2028.