



February 10, 2022

**Mass Save Massachusetts Community First Partnership Agreement
Between
Cape Light Compact JPE or Cape Light Compact and Vineyard Power**

1. OVERVIEW

This Mass Save Massachusetts Community First Partnership Agreement ("Agreement") memorializes the understanding of the Cape Light Compact JPE d/b/a ("Cape Light Compact" or "Program Administrator" or "PA") and Vineyard Power. Vineyard Power is entering into this agreement on behalf of their team that also includes Aquinnah, Chilmark, Edgartown, Oak Bluffs, Tisbury, West Tisbury, and all references to Vineyard Power in this document refer to the entire team including Aquinnah, Chilmark, Edgartown, Oak Bluffs, Tisbury, West Tisbury. Notwithstanding anything herein to the contrary, the use of the term 'Vineyard Power' shall not impose any obligations, duties or liabilities upon the participating communities.

As part of the Energy Efficiency Program Administrators' (PAs) 2022-2024 [Three Year Energy Efficiency Plan](#), the PAs are committed to working with environmental justice ("EJ") communities as designated by the Commonwealth of Massachusetts to reach residents and businesses with energy efficiency services. The PAs have made equity one of the key strategic priorities of the 2022-2024 Plan. Equity, defined as the process of establishing more equal access to and participation in energy efficiency, particularly among those priority groups who have historically participated at lower rates, including renters/landlords, moderate-income customers, English-isolated families,¹ and microbusinesses.

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 are in need of targeted approaches to increase access and participation in energy efficiency programs through our Mass Save Community First Partnership ("CFP").

The objective of the CFP is to leverage the local knowledge and trusted relationships of trusted members within identified communities to prioritize these partnerships to increase engagement with EJ communities, and reach low to moderate-income customers, renters, landlords, English-isolated customers, and microbusinesses to provide access to and ensure participation in PA energy efficiency programs. The PAs 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 must plan and execute up to 24 months of program activity including public education and outreach, such as marketing and/or participation in local

¹ In Massachusetts, the Energy Efficiency Advisory Council ("EEAC") and the PAs refer to customers where 25 percent or more of their household has *no one* over the age of 14 who speaks "English only" or "very well" as "English-isolated families." Being classified as an English-isolated family is one of the Commonwealth's three criteria for a geographic area/community to be designated as an Environmental Justice community. The Environmental Protection Agency (EPA) defines the same population of customers as "linguistically-isolated customers." For the 2022-2024 Plan document, the Massachusetts PAs will use the term "English-isolated families" to remain consistent with the Commonwealth's and EEAC's policies.

events to drive measurable uptake in residential weatherization, residential heating system upgrades, and Small Business Turnkey program participation through the following PA initiatives:

Residential Coordinated Delivery (“RCD”) Initiative

The Mass Save RCD Initiative is designed to promote and facilitate the implementation of energy efficiency upgrades in existing homes to help customers reduce their overall, whole-home energy usage. Through the RCD Initiative customers access home insulation and air sealing services (referred to collectively as “weatherization”). The RCD Initiative provides customers with information and technical assistance, primarily through home energy and facility level assessments, to help them understand their specific energy efficiency opportunities, and which financial incentives can help defray the costs of their investments. Customers are served in a fuel-blind manner, with PAs coordinating a streamlined experience for customers, even if they are served by two or multiple PAs. The RCD Initiative strives to provide flexibility in delivery of services to best match each customer’s unique needs and preferences and align with the technical opportunities for the home and the customer’s authority to implement recommended improvements.

The RCD Initiative includes incentives for some measures installed directly by program contractors, such as water savings devices, and for air sealing and insulation. Additionally, the RCD Initiative promotes a wide array of energy-efficient technologies which are incentivized through the PAs other initiatives such as retail (energy-efficient products, HVAC and DHW systems) and the HEAT Loan (zero percent financing). The PAs work with lead vendors selected through competitive solicitations (“Lead Vendors”), to administer the RCD Initiative. The Lead Vendors work with trade ally partners, including Independent Installation Contractors (“IICs”) and Home Performance Contractors (“HPCs”), along with other contractors such as electricians and HVAC companies to deliver the RCD Initiative. Within RCD, customers are eligible for a variety of assessment types to determine opportunities for efficiency upgrades, which include the Online Home Energy Assessment (OHEA), the virtual Home Energy Assessment and the in-Home Energy Assessment.

Online Home Energy Assessment: An online tool to help customers see how they’re currently using energy, review efficiency recommendations and rebates, and receive an estimate of potential cost savings. Customers also learn if their home is a good candidate for an in-home or virtual energy assessment. The online assessment asks a series of questions to determine opportunities and make recommendations.

<https://www.masssave.com/en/saving/energy-assessments/online-home-energy-assessment>.

Home Energy Assessment (delivered either in-home or virtually): 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), thermal boundary (identifying opportunities for additional insulation and air sealing) and mechanical equipment (assessing the HVAC equipment for efficiency). Efficient products such as advanced power strips and water-saving measures are provided at the visit to help customers start saving immediately. Additionally, customers receive a personalized report with recommendations on other savings opportunities and are provided with information on available rebates and incentives.

<https://www.masssave.com/en/saving/energy-assessments/homeowners>

<https://www.masssave.com/saving/energy-assessments/renters>

<https://www.masssave.com/saving/income-based-offers>

Residential Retail

The Residential Retail Initiative ("RRI") provides a broader 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 Residential Retail Initiative 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, correctly installed equipment. The RRI ensures that all residential customers can access high-efficiency heating, ventilation, and air conditioning (HVAC) and domestic hot water (DHW) equipment, smart thermostats, appliances, and other energy-efficient products. The RRI works to place the most energy-efficient options in front of customers and assists customers in transitioning from traditional electric resistance or fossil fuel systems for home heating and domestic hot water to energy efficient heat pump systems. Customers have the flexibility of selecting their own HVAC technician or plumber to access this initiative. <https://www.masssave.com/en/saving/residential-rebates>

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 weatherization, 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 PA 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.

<https://www.masssave.com/en/saving/business-rebates/energy-saving-solutions-for-small-businesses>

2. GOALS AND FINANCIAL AWARD

VINEYARD POWER'S PARTICIPATION GOALS

Customer participation is defined as scheduled to complete work or work completed within a calendar year.

- Enroll new (not previously participated in HEA) MV residents for an HEA as follows:

TOWN	New HEAs in 2023	New HEAs in 2024
Aquinnah	7	7
Chilmark	27	27
Edgartown	112	112
Oak Bluffs	107	107
Tisbury	90	90
West Tisbury	63	63

- Main Streets

Starting in the Fall of 2023, in advance of scheduled Main Streets event, visit each small business and distribute information on the small business Energy Efficiency program. Maintain a visitor log for each small business. Log should list name of business, address, person contacted and date of visit. CLC shall provide map of Main Streets area and information on small business energy efficiency programs.

- Hold community events and present information on CLC EE as follows. Prepare a report for each community event. Report should include event name, date and number of attendees.

TOWN	Events in 2023	Events in 2024
Aquinnah	2	2
Chilmark	4	4
Edgartown	4	4
Oak Bluffs	4	4

Tisbury	2	2
West Tisbury	2	2

- Vineyard Haven Community: Identify locations for distributing/posting flyers on the Winter Mitigation offering. Task begins April 1, 2023 and completed May 31, 2023.

VINEYARD POWER'S FINANCIAL AWARD

Based on the application submitted by Vineyard Power and included as Appendix A, Vineyard Power will be eligible for an award from Cape Light Compact which will total up to \$120,000.00 pending goal achievement.

Vineyard Power is independently responsible for reaching the above goals. Vineyard Power will be reimbursed as noted below.

Upon Contract Execution: \$60,000.00
 January 2024: \$60,000.00

3. TERM

The Term of this agreement shall be from January 1, 2023, to December 31, 2024, unless earlier terminated in accordance with MOA.

○ **SUPPORT RESOURCES FROM Cape Light Compact**

In addition to the financial support listed above, Vineyard Power will receive support from Cape Light Compact including, but not limited to:

- Implementation support through a lead vendor: PAs will hire a vendor ("CFP Lead Vendor") to support coordinated implementation, such as supporting data tracking for Community Partners, and training and supporting the Energy Advocates. All CFP program participants are required to work with the selected CFP Lead Vendor to reach program goals.
- Designated point of contact with Program Administrator at the Cape Light Compact.
- Additional point of contact who specializes in energy saving opportunities within municipal buildings.
- An orientation session including an introductory training on energy efficiency programs.
- Periodic training sessions by content experts to orient CFPs on energy efficiency offerings, best practices, and coordination with the local network providers to better serve eligible residents.
- Training sessions to orient CFP on energy efficiency offerings, best practices and coordination with the local Community Action Program ("CAP") or Low-Income Energy Affordability Network ("LEAN") including incentives available to income eligible customers and how to best ensure that income-eligible customers connect to energy efficiency programs.
- Daily support from CFP Lead Vendor to include technical support with reaching program goals.
- Regularly scheduled meetings (biweekly with CFP Lead Vendor to provide guidance and deliberate on program performance and opportunities for growth.
- Quarterly progress report on progress to goals.
- Monthly conference calls to discuss outreach, successes, challenges, and best practices to address barriers to greater program participation.
- Assistance in planning local events.

Cape Light Compact and CFP Lead Vendor will work with the Vineyard Power on the requested marketing materials to help support the City's outreach efforts. All marketing should be approved by CFP Lead Vendor prior to use.

4. VINEYARD POWER'S RESPONSIBILITIES/PARTICIPATION REQUIREMENTS

Participation Requirements:

- Must be a municipality, registered nonprofit or have a fiscal agent. Applicants representing multiple municipalities and/or nonprofits must designate a lead municipality/nonprofit that will receive disbursements of funds.
- Must have a track record of work in, and proposal to focus partnership activities in, designated Environmental Justice communities in Massachusetts.
- Must commit to a two-year partnership.
- Must submit outreach, marketing and communication plan for first year and then annually each following year.
- Must submit budgets for all two program years. Greater details of year one's budget will be expected; a broader budget breakdown for year two is acceptable. The cost to compensate an Energy Advocate for 5-10 hours a week for at least \$17/hour must be included as a component of the budget.
- Must be open to building partnerships with additional community organizations.
- Must be open to completing local community organizing.
- Must be open to creating innovative strategies and initiatives to engage residents.

Participation Responsibilities:

- Must attend mandatory two-hour orientation on targeted Massachusetts PA offerings and best practices in marketing and community outreach.
- Must participate in monthly calls and submit monthly outreach reports.
- Must complete at least one marketing activity per month. The marketing activity could include any of the following categories: social media posts, ads, direct mail, articles, video, informational flyers dispersed in schools, workshops/webinars, etc.
- Must track and report progress – see additional detail in the Tracking section.
- Must have a primary contact who will dedicate at least one hour per week to this initiative, as well as a designated "Energy Advocate" who will dedicate at least 5-10 hours per week to this initiative. It is acceptable for the primary contact and the Energy Advocate to be the same person.
Energy Advocate roles and responsibilities:
 - Participate in all trainings held by Cape Light Compact or its designee for Energy Advocates to familiarize them with energy efficiency offerings, community based social marketing, and community based participatory research.
 - Serve as an advocate for customers who need support and guidance to enroll in the Mass Save programs.
 - Work with PAs to track and record participation barriers.
 - Work to increase customers' program participation rates by supporting coordination between program vendors and customers.
 - Actively communicate with customers to guide them through the application process and broker communication with stakeholders to reduce program participation barriers.
 - Manage administering a community-based social marketing campaign to promote communitywide behavioral change by collaborating across a diverse group of partners.
 - Submit reports to CFP Lead Vendor to support tracking and exploring solutions to program participation barriers.
- Must submit all marketing materials that will be used for outreach for the Community First Partnership, Cape Light Compact or Mass Save, for review and approval to CFP Lead Vendor before they are finalized and used in the community.
- Must coordinate with the local Community Action Program/Low Income Energy Affordability Network (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.

- Must submit a final report (one to three pages) on progress at the end of the year and hold a year-end review meeting with Cape Light Compact at the end of each year. Cape Light Compact reserves the right to work with the applicant team to adjust their goals and budget if necessary.
- Must complete a survey annually on how the CFP has/will spend its award funding and how they would like to stay engaged with their PA(s) after their participation period.
- Must select at least one or more subset of customers to engage: small businesses, renters, bi-lingual customers, or moderate-income customers. Must participate in creating and implementing community-based social marketing campaigns.
- Must actively participate in Program Administrator research and evaluation.
- Must inform Cape Light Compact or their designee of planned door to door outreach on behalf of the CFP program and ensure that all paid and unpaid staff participating in door-to-door outreach have complied with Cape Light Compact's criminal background check process.
- Vineyard Power will be responsible for providing Cape Light Compact the necessary documentation for payment, including invoices with the required information. Invoices must be submitted to PAs within two calendar weeks following the end of the previous quarter.
- Submission of monthly updates to Cape Light Compact on progress of marketing activities including specific outreach to identified hard to reach segments.
- As indicated in the Mass Save Three-Year Energy Efficiency Plan- the PAs will draft and implement a Rental Unit Strategic Plan in 2022. All CFP partners will engage in information sharing and ongoing research to support outreach and engagement to renters and landlords that may include the CFP partner's tactics, as well as additional activities. This engagement could include, but is not limited to, outreach to community stakeholders, local organizations, city departments, private businesses, renters, and landlords, to promote events, surveys, and research organized by PAs in support of enhancing efforts to increase program participation among renters and landlords. This additional partnership engagement serves to increase understanding of each partner's community and reduce program participation barriers for residents in their community. PAs will provide additional support and logistical coordination for all program partners to minimize the impact on current CFP goals.

5. PARTNERSHIP DETAILS

• Partnership path options

- Hub Team: Consisting of municipal staff, and community-based organization members representative of the municipality(ies) on the Community Partner team, a representative of the PAs lead vendor for this program, and PA representatives. The hub will be led by the Community Partner's "Energy Advocate" who coordinates quarterly meetings with municipal departments. PAs provide marketing templates for the Community Partner.
- Flex Format: Highly targeted approach; applicant proposes innovative outreach strategies; Energy Advocate is on the team; team creates their own marketing materials (materials must be approved by PAs prior to use) and team partners with contractors, landlords and employers.
- For either path, Community Partners will convene monthly meetings with their team and include the PAs lead vendor and representative(s) from PA(s). Energy Advocates track primary metrics listed below and PAs track additional metrics listed in "support resources from PA" section of this MOA.

• Community-based participatory research

- **The CFP Lead Vendor** will create tracking tools to support Energy Advocates with tracking and recording participation barriers. PAs will utilize this data to build on the strengths and resources of the community by promoting co-learning among PAs and the Community First Partner to inform program development and goals.

• Community-based social marketing

- As part of the participation in the Community First Partnership, the PAs require that, in certain instances, marketing materials developed by 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 HPC is not able to serve (criteria of this building classification is dependent on when/if the PAs move away from the 5+ unit requirement).
- This campaign will require accepted applicants to coalition diverse stakeholders who actively work with the hard-to-reach population. Applicants will allocate three to six months toward a planning process to reach the following benchmarks:
- Select behaviors to promote.
 - Host focus groups to identify program barriers and benefits.
 - Develop strategy.
 - Identify target audience.
 - Develop compelling messages.
 - Obtain clear commitments from local stakeholders/groups.
 - Create an inclusive call to action.
 - Strategies on how to build community norms through this campaign.
 - Craft simple, clear messages for marketing and advertising. Materials must be approved by the PAs prior to use.
 - Draft a list of PA approved prizes, awards and or raffles to engage the larger community.
 - Implement and evaluate strategy.

Any external funding or resources procured to do outreach, advertise and/or market to program participants must be marketed solely as Mass Save Community First Partnership, if the marketing is only related to the Mass Save Community First Partnership. Program Administrators do not authorize the duplication of conflicting marketing campaigns to Mass Save customers, but do not object to marketing campaigns that do not conflict with the Mass Save Community First Partnership.

6. TRACKING & REPORTING

Cape Light Compact will provide a baseline of 2019-2021 achievement in residential weatherization, residential HVAC, and Small Business Turnkey for each municipality listed on Vineyard Power's application, as well as monthly municipal-level progress on the same metrics and track use of campaign codes where possible. PAs will also use the statewide marketing annual awareness survey to track awareness of Mass Save programs in Community Partner municipalities. Community Partners will receive support from an implementation vendor ("Vendor") who will be helping to coordinate a tracking system to simplify and streamline the system for all. The Vendor will also help Community Partners be able to track more accurately how many people/businesses participate in energy efficiency (EE) programs from their efforts.

Vineyard Power will be responsible for reporting the following data monthly to the "Vendor."

- Outreach progress summary including data collection on 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 – Vineyard Power will be expected to track names and contact information for 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 CFP is engaging and how often.
- Number of property owners of rental buildings generated as leads.
- Optional: Community Partners who want to track race/ethnicity and other demographic data of customer leads they generate will be expected to propose their own tracking system in their application and share that data with PAs.
- If applicants do not meet the goals established by year one, PAs 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 review of the budget to assess best use of funds for the remainder of the initiative.

7. INVOICING

Vineyard Power should coordinate with the Cape Light Compact support team to provide the necessary information to proceed with payment. Required documents/information could include a W-9 (demonstrating that the municipality or organization is tax-exempt), mailing address, made payable to, etc. PAs will use this information to set up an Authorization for Payment ("AFP") with Vineyard Power to issue payment. Payment shall be due within 60 days of Cape Light Compact receiving an invoice from the Vineyard Power, and as described in Section 2 herein, related to the Financial Awards.

Invoices must be submitted to PAs by [Community Group] within two calendar weeks following the end of the previous quarter.

Invoices should be submitted on the Municipal or Organizational Letterhead and include the following:

- Invoice Number
- Prepared By
- Date
- Project: Mass Save Community First Partnership
- Description of Award
- Total Amount
- Information on Payment Remittance

SUPPORT TEAM:

Cape Light Compact support team:

Briana Kane
Residential and Commercial Program Manager

bkane@capelightcompact.org

Community First Partner support team:

Richard Andre
President

richard@vineyardpower.com
508-693-3002

8. TERMINATION RIGHTS

Either party may terminate this Agreement within thirty (30) days written notice if the other party is not complying with the requirements of this Agreement. The written notice must also be provided to all the participating communities (consisting of Aquinnah, Chilmark, Edgartown, Oak Bluffs, Tisbury and West Tisbury). Further, if the PA determines Vineyard Power is not demonstrating a good faith effort to reach the participation requirements as outlined throughout the document, the PA may terminate this Agreement.

The PAs may, in their sole discretion, at any time and without notice, terminate the [municipality and/or community-based organization] participation in the Community First Partnership or modify the Community

First Partnership and the terms outlined herein. Community First Partnership expenditures, requirements and eligibility may be terminated, canceled, or modified by Massachusetts PAs at any time without notice.

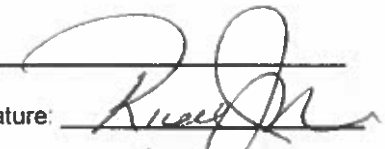
9. GENERAL CONTRACTING TERMS

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 or 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 Vineyard Power and Cape Light Compact. Cape Light Compact shall comply with all requirements of all laws, orders, ordinances, and regulations of the federal, state, and municipal authorities.

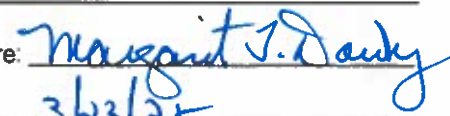
If any section, sentence, paragraph, term, or provision of this Agreement is determined to be illegal, invalid or unconstitutional, by any court of competent jurisdiction or by any State or Federal regulatory agency having jurisdiction thereof, such determination shall have no effect on the validity 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 with respect to 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 Vineyard Power is an agent, partner, or joint venturer of PA, 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 Representative

Company Name: Vineyard Power Development Fund
Name: Richard Andre Signature: 
Title: President Date: 3/22/23

Program Administrator Representative

Company Name: Cape Light Compact
Name: Margaret T. Daoney Signature: 
Title: Administrator Date: 3/23/23

