

**TOWN OF MONTEREY**  
**COMMUNITY CHOICE POWER SUPPLY PROGRAM**

<b>PUBLIC ACCESS TO PLAN/ONGOING PROGRAM INFORMATION</b>	
<b>Description</b>	<b>Location</b>
Municipal website	<a href="http://www.montereyma.gov/">http://www.montereyma.gov/</a>
Program website	<a href="https://colonialpowergroup.com/monterey/">https://colonialpowergroup.com/monterey/</a>
Communication vehicles/ Outreach activities	Activities posted on municipal website
Social media accounts	<a href="#">N/A</a>
Municipal cable access TV	<a href="https://www.youtube.com/channel/UCewD6lnU8jTd9gzYV1c46w">https://www.youtube.com/channel/UCewD6lnU8jTd9gzYV1c46w</a>
Announcement to local/regional media	<a href="https://www.berkshireagle.com/">https://www.berkshireagle.com/</a>
Physical posting in municipal buildings	Town hall, clerk's office, library, senior center, etc
Municipal departments, boards and committees	<a href="https://www.montereyma.gov/select-board">https://www.montereyma.gov/select-board</a>
Community organizations	As appropriate

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ORGANIZATIONAL STRUCTURE			
Core Functions	Performing Entity		
	Town	Consultant	Supplier
<b>Liaisons/Representatives/Agents</b>			
Municipal Representative/Agent before Department	<a href="https://www.montereyma.gov/town-administrator">https://www.montereyma.gov/town-administrator</a>		
Liaison with DOER		X	
Liaison with Electric Distribution Companies		X	
<b>Plan Elements</b>			
Procurement of Supply	X	X	
Product Determination	X		
Other Funding/Costs	X		
Customer Enrollment			X
Customer Notifications/Outreach/ Education	X	X	
Ongoing Program Information	X	X	
Program Termination	X		
Annual Reports		X	
<b>Customer Service</b>	<a href="https://www.montereyma.gov/town-administrator">https://www.montereyma.gov/town-administrator</a>	Colonial Power 866-485-5858 ext. 1 <a href="https://colonialpowergroup.com/contact/">https://colonialpowergroup.com/contact/</a>	Dynergy Energy Services 866-220-5696 <a href="https://www.dynergy.com/municipal-aggregation/communities-we-serve/Massachusetts/monterey">https://www.dynergy.com/municipal-aggregation/communities-we-serve/Massachusetts/monterey</a>
Other (description)			

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EQUITABLE TREATMENT OF CUSTOMER CLASSES					
Plan Element					
Procurement of Supply	Product Rate Setting/Renewable Energy Content	Other Funding Sources/Costs	Customer Enrollment	Customer Notification	Ongoing Program Information
(§ IV.B.2)	(§ IV.B.3)	(§ IV.B.4)	(§ IV.B.5)	(§ IV.B.6)	(§ IV.B.7)
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Table IV.B.1.c identifies the Plan elements for which the treatment between customer classes (or subclasses) may vary in order to ensure equitable treatment. The municipality anticipates that varied treatment that reflects the disparate characteristics of each customer class will be reasonable and appropriate.

Customer classes and subclasses differ in many respects such as electrical load, electricity consumption patterns or load factors, interest in and the ability to support enhanced renewable energy or opportunities described in the DOER Best Practices or factors associated with Environmental Justice Populations such as English proficiency. These distinctions are expected to affect all aspects of Program operation. For example, effective and responsive procurement, product determination, enrollment, notification and ongoing customer education efforts will vary between residential and larger commercial or industrial customers due to differences between customers in these classes and their consumption patterns. These factors will necessarily affect the Program’s best practices for all of the elements identified in Table IV.B.1.c. Examples of appropriate, varying treatment for each element are also described below.

**Procurement of Supply** – While supply procurement actions and the expected timeline for each action are typically the same across all customer classes, alternative approaches may be employed for some classes or subclasses, for example in the context of procuring local renewable energy sources consistent with DOER Best Practices.

**Product Information** – Product information may vary by customer class or subclass. Certain customer subclasses differ in material respects in electrical load, electricity consumption patterns, and load factors. The Program therefore may offer such subclasses different rates to mitigate negative outcomes for other customer classes. For example, large industrial Electric Customers who (i) are new Auto-Enroll Customers, (ii) have previously opted out of the Program, or (iii) are being served by a Competitive Supplier may request to join the Program. Given the high monthly usage of such customers, enrollment may be at the then-current market price.

**Other Funding Sources/Other Costs to Participants** – Product funding or costs may vary by customer class or subclass.

**Customer Enrollment** –Customer enrollment may vary by customer class or subclass, including for example with respect to large industrial customers. On a periodic basis, the municipality will (1) automatically enroll new Auto-Enroll Customers, with the exception of new large industrial Auto-Enroll Customers, subject to the opt-out provisions for initial enrollments described above; and (2) provide Non-Auto-Enroll Customers with the opportunity to join the Program on an opt-in basis. Large industrial Electric Customers who (i) are new Auto-Enroll Customers, (ii) have previously opted out of the Program, or (iii) are being served under competitive supply may request to join the Program at the then-current market price.

**Customer Notifications** – Opt-Out notices and procedures, notifications of product change, and customer notification and educational materials and procedures may vary by customer class or subclass.

**Ongoing Program Information** – Access to ongoing Program information will sometimes be differentiated, for example to better accommodate Electric Customers who require specialized translation or assistive technology to aide their access to and understanding of information.

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<b>PROCUREMENT OF SUPPLY</b>	
<b>Procurement Steps</b>	<b>Timeline</b>
Issue RFQs/RFPs	3/20/2023
Evaluate/Select Bids	4/12/2023
Negotiate/Execute Contracts	4/12/2023
Other (description)	-

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**MUNICIPAL AGGREGATION GUIDELINES DEFINITIONS (DPU 23-67)**

**Annual Report** – means the report that Municipalities shall file annually with the Department that includes Program information for the previous year.

**Auto-Enroll Customer** – means an Electric Customer who is eligible to be enrolled in a Program on an opt-out basis, specifically all Basic Service customers except for those customers who (1) have informed the Electric Distribution Company they do not want their account information shared with their municipality, or (2) are participating in an optional “green power” program that requires them to remain on Basic Service.

**Basic Service** – means the electric supply product that the Electric Distribution Companies provide to Electric Customers in their service territory that are not receiving an electric supply product from a Competitive Supplier or through participation in a Program.

**Competitive Supplier** – means an entity licensed by the Department to sell electric supply products to Electric Customers, as defined in 220 CMR 11.02.

**Consultant** – means an entity retained by a city or town (or a group of cities or towns) to assist with the development and operation of a Plan and Program.

**DOER** – means the Massachusetts Department of Energy Resources.

**Default Product** – means the Product that participants in a Program receive unless they affirmatively select an alternate Product.

**Department** – means the Massachusetts Department of Public Utilities.

**Electric Customer** – means the customer of record of an account with an Electric Distribution Company.

**Electric Distribution Company** – means an investor-owned entity that provides electric distribution service as a monopoly service to Electric Customers in their specified service territories. The Electric Distribution Companies are Fitchburg Gas and Electric Light Company d/b/a Unitil, NSTAR Electric Company d/b/a Eversource Energy, and Massachusetts Electric Light Company and Nantucket Electric Light Company each d/b/a National Grid.

**Electricity Broker** – means an entity that is licensed by the Department to facilitate or otherwise arrange for the purchase and sale of electric supply and related services to customers, as defined in 220 CMR 11.02.

**Environmental Justice Population** – in Massachusetts, an environmental justice population is a neighborhood that meets one or more of the following criteria:

- the annual median household income is not more than 65 percent of the statewide annual median household income;
- minorities comprise 40 percent or more of the population;
- 25 percent or more of households lack English language proficiency; or
- minorities comprise 25 percent or more of the population and the annual median household income of the Municipality in which the neighborhood is located does not exceed 150 percent of the statewide annual median household income.

**Guidelines** – means these Municipal Aggregation Guidelines.

**Municipality** – means a city or town (or group of cities or towns) that (1) operates a Program pursuant to G.L. c. 164, § 134(a), or (2) has filed a Plan for Department approval.

**Opt-In Product** - means those Products that Participants in a Program must affirmatively select to receive.

**Opt-Out Notice** – means the document sent to Auto-Enroll Customers to inform them of their right to opt-out of such enrollment.

**Participant** – means an Electric Customer that is participating in a Program.

**Petition** – means a petition submitted by a Municipality to the Department for review and approval of a Plan.

**Plan** – means the document that a Municipality submits to the Department for approval to administer a Program pursuant to G.L. c. 164, § 134(a).

**Program** – means a program in which a Municipality aggregates Electric Customers located within its municipal boundaries for the purpose of procuring electric supply and energy-related products and services, pursuant to G.L. c. 164, § 134(a).

**Program Supplier** – means the Competitive Supplier that is providing electric supply and, if applicable, energy-related products and services to Participants.