



Program Materials for Connected Solutions for Commercial / Industrial Customers

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Summary

The ConnectedSolutions Active Demand Response Program incentivizes customers of the Massachusetts Program Administrators (Cape Light Compact, Eversource, National Grid, and Unitil) (“PAs”) to curtail their energy when the grid is forecasted to be at its peak. Customer and their curtailment service provider are compensated on a pay-for-performance basis for every average kW they curtail.

The ConnectedSolutions Program offers customers 2 options to participate:

- Targeted Dispatch option aims to reduce the load on the electrical grid at the one peak hour of the year and other high peak days in June, July, August, and September for a total of no more than 8 events per summer.
- Daily Dispatch option aims to reduce the load on the electrical grid at the one peak hour of the year and other high and medium peak peaks in June, July, August, and September for a total of no more than 60 events per summer.

A summary of each option, by PA, are shown in the table below.

	Targeted Dispatch	Daily Dispatch
Number of Events per Season	1 to 8 per Summer	30 to 60 per Summer
Incentive	\$35/kW-Summer ¹	\$200/kW-Summer
	+10/kW-Summer Weekend Bonus ²	
Incentive Lock	None	5 Years
Length of Events	3 Hours	2 to 3 Hours
Incentive Lock	None	5 years
Time of Day	Between 2pm and 7pm	Between 2pm and 7pm
Weekend/Weekday	Mon. – Friday Only	Any Day
	With a Weekend Bonus	
Events on Holidays	No	Yes
Day-Ahead Notification	Yes	Yes
Months	June – September	June – September
Metering Assistance Incentive (Eversource Customers Only)	\$1,500 upfront incentive to help pay for required metering	

¹ For Cape Light Compact Customers, Eversource, and Unitil customers, add \$65/kW-summer (total \$100/kW-summer) to the Targeted Dispatch incentive when curtailing/discharging with electrochemical battery storage such as a lithium ion or redux battery. For Eversource customers, add \$50/kW-summer (total \$75/kW-summer) to the Targeted Dispatch incentive when curtailing/discharging with thermal storage technologies such as phase change materials.

² Weekend events for Targeted Dispatch are only called if deemed necessary by the customer’s PA. The weekend bonus is paid on the average performance over all weekend events for the summer.

Enrollment through a CSP and Direct Participation

Typically, customers enroll through an approved Curtailment Service Provider (CSP). The approved CSPs for each PA are listed below. CSPs provide many services that make it easier for customers to maximize their curtailment performance and incentive. However, enrolling through an approved CSP is not a requirement of the program. Customers may use any CSP they chose, or not use a CSP at all. “Direct Participation” refers to a customer enrolling without a CSP. In this case, customers should reach out to their PA for guidance.

CSP	National Grid	Eversource	Cape Light Compact	Unitil
CPower	X	X	X	X
Enel-X	X	X	X	
IPKeys	X			
Voltus	X	X	X	

For Eversource and Cape Light Compact Customers

If a customer enrolls through a CSP, the customer will benefit from the integration between the CSP and the PA. This integration will provide PAs with on-site telemetry and automatic scheduling, which will ease the settlement of performance and consequent payment of incentives.

Direct Participants will be required to integrate with Eversource’s and Cape Light Compact’s demand response dispatch platform and will be responsible for any associated fees to do so. In this case, customers should contact Eversource or the Cape Light Compact for guidance.

Shared Savings

Typically, customers share the incentive with CSPs. This is a common practice in other demand response programs, such as ISO-NE’s programs. How or if the incentive is split between the customer and the CSP is up to the customer and the CSP. The PAs, except for Unitil, do not require or reject how or if the incentives are split. For Unitil, CSPs must passthrough a minimum percentage of the incentive to the end customer. Direct Participants will receive the full incentive amount directly.

Annual Payment Process

Incentive payments for the summer programs, Targeted Dispatch and Daily Dispatch, will be made after the summer ends and before the end of the calendar year.

For Cape Light Compact, National Grid, and Unitil Customers:

If a customer enrolls through a CSP, the customer’s seasonal performance incentive will be sent directly to that CSP at the end of the season. This allows the CSP to remove their shared savings portion of the



customer incentive and pass the remainder through to the customer. This is also common practice for customers who participate in ISO-NE's demand resource programs through a CSP.

If a customer does not enroll through a CSP, the full incentive will be paid directly to the customer. In this case, please mark NONE (DIRECT PARTICIPANT) on the customer application and provide the customer tax ID number, company type, and who the check should be made out to.

For Unitil Customers Incentive

Unitil will pay Incentives to the Curtailment Service Providers ("CSPs") or Direct Participation customers up to 20% more than the customer's seasonal average commitment ("amount") stated in the customer's Application for ConnectedSolutions. Customers must receive written permission from Unitil in order to be guaranteed that Unitil will pay more than this amount. Without written permission to exceed this amount, Unitil reserves the right to not pay more than this amount. It is strongly recommended that customers seek written permission before curtailing more than this amount.

For Eversource Customers:

Customers will be able to elect their payment option when applying for the program:

1. Payment to their CSP. This allows the CSP to remove their shared savings portion of the customer incentive before the customer gets paid. This is also common practice for customers who participate in ISO-NE's demand resource programs through a CSP.
2. Payment to the customer only. This will be typical for direct participants.
3. Split payment to customer and vendor. The customer portion of the incentive will be paid directly to the customer, and the CSP portion will be paid directly to the CSPs, based on the PERCENTAGE OF INCENTIVE value entered in the customer application.

Number of Events

Targeted Dispatch

Although the intent of this program is to decrease electricity use at the one ISO-NE peak hour of the year, more than one event will be called per summer due to uncertainty in forecasting when the peak hour will be. The PA's will limit the number of events depending on the uncertainty of the forecast. The PAs may call events when the system load is particularly high, for example, during a heat wave, and may call events consecutive days. The PA's won't call more than 8 events in a summer.

Daily Dispatch

The goal of Daily Dispatch is to not only hit the ISO-NE peak hour, but also the highest daily peaks, which typically occur in July and August. Events will only be called in June and September if the annual peak is forecasted to be in those months. Events will be called in July and August to try to hit the highest 40 daily peaks. The PAs will never call more than 60 events in a summer.



Eligibility Requirements

To be eligible for this program, the customer must have a National Grid, Eversource, or Unitil electric service account in Massachusetts where the demand response savings will be implemented. The customer must also pay into the energy efficiency fund on their electric bill. Most electric customers pay into the energy efficiency fund. Customers whose National Grid, Eversource, or Unitil electric service monthly bill has a line for “Energy Efficiency Prgms” and pay into this line item over the course of a year are eligible for this program. Front of the meter assets such as power plants or solar farms are not eligible for this program.

To be eligible of this program, the battery storage system must be considered a behind-the-meter (BTM) asset. BTM means a facility that serves an on-site load other than parasitic load or station load utilized to operate the facility.

Enrollment Deadlines

To participate in that summer’s program, a customer should enroll in Targeted Dispatch or Daily Dispatch by 11:59 p.m. on May 31 of that year.

Customers may enroll later than May 31st, but for settlement purposes, any event called before the enrollment date will still count towards settlement of performance and will be included in the Customers’ performance calculations as zero performance for the missed events.

Withdrawal from the Program

Customers who enroll in the Connected Solutions program will remain in the program year to year until they provide written notice to their CSP or program administrator that they would like to be removed from the program. Once the season starts, the customer must stay enrolled for the entire season to receive the incentive. A customer cannot unenroll part way through a season and receive the performance incentive for fewer events than all the other program participants.

Cancellation of the Program

Due to regulatory, cost effectiveness, or other reasons, the program administrators or individual program administrators (Cape Light Compact, National Grid, Eversource, and/or Unitil) may cancel their Connected Solutions Program or subsets of their program at any time.

Notification of Demand Response Events

Notification of demand response events will be given at 1pm the day before the event. For customers who sign up through a pre-approved CSP, these notifications will be sent to the customer’s CSP. The CSP is then responsible for notifying the customers. Notification emails will be sent directly to Direct Participants using the email address given in the customer’s application.

Typically, CSPs offer a variety of ways of notifying customers of events. These can include email, voicemail, phone call, text message, and/or machine-to-machine communication. Customers and CSPs are responsible for implementing the necessary communications so that customers are notified of events.



Length and Time of Demand Response Events

Targeted Dispatch events last three hours. Daily Dispatch events can last two or three hours. All events happen between 2pm and 7pm, and all events start and end at the beginning of the hour (i.e. start time: 2pm, 3pm, or 4pm or end time: 5pm, 6pm or 7pm).

Days for Demand Response Events

Targeted Dispatch program events are generally called on weekdays. However, there is a Weekend Bonus available for customers who curtail if an event is called on a weekend.

The Daily Dispatch events are called on both weekdays and weekends and can be called on holidays. Targeted Dispatch events will not be called on the following holidays.

Dispatch Season	Holiday	Typical Observed Date
Summer	Independence Day	July 4
Summer	Labor Day	First Monday of September

Demand response events can be called for a Monday. In this case the event notification will still be given the day before the event, Sunday, which is a weekend day.

Performance Calculation

The incentive rates refer to the average curtailment amount across every event of the demand response season. If a customer chooses not to participate in an event, the baseline method and performance calculation will be done as if the customer had participated. This would likely result in a low calculated performance for that event, which would lower the customers average performance for the season and lower the incentive for the season.

Performance for an event may not be increased by curtailing solar or CHP production to increase a battery’s discharge rate. For example, if the total production of the solar system and battery system is limited by the inverter size, the solar system cannot be limited during demand response events so that the battery can discharge more. Doing this would not decrease the load on the grid and would be against the goals of this program.

For example, the table below shows the results of a fictional customer’s curtailment performance over a Targeted Dispatch season that had 3 demand response events over the whole summer.

Event	Performed Curtailment Amount
Event 1	100 kW
Event 2	200 kW
Event 3	300 kW

The customers average performance over the summer would be:

$$Average\ Performance = \frac{100\ kW + 200\ kW + 300\ kW}{3} = 200\ kW$$

The total incentive amount to be paid for this fictional customer would be:



$$200 \text{ kW} \cdot \frac{\$35}{\text{kW}} = \$7,000$$

For National Grid customers: The average performance for Daily Dispatch is calculated using either utility meter-level load data or asset meter-level load data. If asset (such as a generator or battery) level load data is provided, the performance will be calculated using this data. If asset meter-level load data is not provided, performance will be calculated using the customer’s utility meter-level load data.

For Cape Light Compact, and Unitil customers: Only batteries are allowed in Daily Dispatch and battery-level load data must be provided to Eversource or the Compact. Customers without battery-level load data will not be accepted into the program.

For Eversource customers: Only batteries and Thermal Storage (ice storage and phase change material) are allowed in Daily Dispatch. Battery-level load data must be provided to Eversource. Customers without battery-level load data will not be accepted into the program. For Thermal Storage, asset level interval data must be provided to Eversource via the DERMS (distributed energy resource management system) platform.

Weekend Bonus for the Targeted Dispatch Options

Although it is rare, weekend events may be called in the Targeted Dispatch program. If a weekend event is called in the summer, customers will be paid an additional \$10/kW-performed incentive for their average performance over all weekend events for the summer. This incentive is in addition to the \$35/kW-performed incentive or storage incentive paid for weekday performance. A customer performance on a weekend will not impact their weekday performance calculation or vice versa.

For example, for a hypothetical summer in which there are 2 weekend events and 2 weekday events a customer who curtails 100kW for each event would be paid the following in the Targeted Dispatch measure.

Day Type	Incentive Rate	Incentive for a customer with a 100kW Performance for All Events
Weekday Standard Measure	\$35/kW	$100\text{kW} \cdot \frac{\$35}{\text{kW}} = \$3,500$
Weekend Bonus	\$10/kW	$100\text{kW} \cdot \frac{\$10}{\text{kW}} = \$1,000$
Total Incentive for the Summer		\$4,500

The Weekend Bonus will use the same performance calculation as the rest of the Targeted Dispatch. However, the baseline will use the last 5 similar days instead of the last 10. If the PA’s call more than one weekend event, the final bonus will take into account the average performance in all weekend events.

5-Year Incentive Lock for Daily Dispatch

For new battery storage systems, the customer’s per-kW incentive level is locked in for the first 5 consecutive years that the customer is in the Daily Dispatch Summer program. Even if the incentive rate



for new customers in the Daily Dispatch Summer program changes during the first 5 years of the customer's participation, the incentive rate for that customer will remain the same. After the 5th year of participation, the customer will receive the incentive rate (if any) offered by the program administrator at that point in time.

New installations are any installations that have a completed interconnection application after 7/28/2020.

Co-Participation in the Clean Peak Standard (CPS) Program

Customer may co-participate in the Clean Peak Standard Program and Connected Solutions. The customer's Mass Save program administrator does not reserve any rights associated with clean peak energy certificates generated through participation in the Connected Solutions program. The customer's performance during Connected Solutions events will be evaluated based in accordance with the Performance Calculation section below, regardless of the customer's participation or enrollment in CPS.

Co-Participation in ISO-NE Demand Resource Programs

Customers may co-participate in ISO-NE Demand Resource Programs and Connected Solutions. It is possible that a Connected Solutions demand response event could fall within the 10-day baseline period used by ISO-NE. In this case the customer's baseline may be eroded by participating on the Connected Solutions event. Customers and their CSP should consider this risk before enrolling in Connected Solutions.

Although rare, it is possible that both Connected Solutions and ISO-NE will call on a customer to curtail on the same day. This will not affect how the customer performance is calculated in the Connected Solutions program. If the Connected Solutions event starts before the ISO-NE event, it may decrease the same-day-adjustment calculated by ISO-NE. Customers and their CSP should consider this risk before enrolling in Connected Solutions.

If demand response assets are called by ISO-NE because of real-time market prices exceeding \$950/MWh at any time during a day or an ISO-NE OP4 event is called during the baseline period of a Connected Solutions event, this day will not be counted in the baseline. Please see the Baseline section below.

One of the benefits of the Connected Solutions program is the decrease in the long-term installed capacity requirement (generation) in the ISO-NE markets, also known as the installed capacity requirement (ICR). Customers are not allowed to co-participate in Connected Solutions and any ISO-NE program that would cause the customer's curtailment in the Connected Solutions program to be reconstituted in the ICR, because this would negate one of the core goals of Connected Solutions. The current structure of ISO-NE's active Forward Capacity Market does not systematically reconstitute Connected Solutions curtailment into the ICR, and any reconstitution that does occur is rare. Customer who are participating in the FCM are also allowed to participate in Connected Solutions.



Co-Participation in SMART

Customers may co-participate in SMART (Solar Massachusetts Renewable Target) Program and Connected Solutions. SMART provides an energy storage adder for applicable technologies.

Participation in Connected Solutions satisfies the 52 full-cycle discharge requirements of SMART. Please see 225 CMR 20.00 SOLAR MASSACHUSETTS RENEWABLE TARGET (SMART) PROGRAM Section 20:06 (1) (e) 5 For more details. By enrolling in Connected Solutions, the customer and their vendor agrees to allow the customer's PA to share Connected Solutions enrollment with the Department of Environmental Resources (DOER) for the purpose of certifying the fulfillment of the SMART operational requirements.

The customer's program administrator will report the completion of this requirement on the customer's behalf. If the customer's energy storage system fails to perform in the required number of events the customer energy storage system can still maintain eligibility for SMART if the customer independently documents and reports at least 52 complete cycle discharge equivalents in a calendar year.

Exporting Power to the Electrical Grid

Renewable Energy Only Systems

Customers with interconnected renewable energy systems, such as solar PV and wind turbines, may participate in Connected Solutions. Renewable energy systems, especially solar PV, provide somewhat predictable performance. Curtailment performance of customers with renewable energy systems will be calculated like every other program participant. When a customer's interconnected renewable energy system produces more electricity than the customer's facility, that excess electricity is sent, exported, to the electrical grid. If the customer is already exporting power to the grid during a demand response event, the customer can still participate in Connected Solutions by reducing the facility electrical load during events so that even more power is sent to the grid. The baseline methods used in this program will compensate the customer for this facility's curtailment.

Renewable Energy Plus Storage

Customers with interconnected renewable energy systems, such as solar PV and wind turbines, and energy storage systems, like batteries, may participate in Connected Solutions. The SMART Program and the federal investment tax credit (ITC), also known as the federal solar tax credit, provide added incentives for energy storage systems that are charged by renewable energy systems. Before exporting power to the grid, customers must go through the interconnection process. Participation in the Connected Solutions program does not alter a customer interconnection service agreement (ISA).

Storage Only Systems

Customers who don't have a renewable energy system but do have an energy storage system may participate in Connected Solutions. Before exporting power to the grid, customers must go through the interconnection process. Participation in the Connected Solutions program does not alter a customer interconnection service agreement (ISA).



Performance Calculation

Shutdown reporting requirement

Customers or their CSP must inform their program administrator of a planned facility shutdown with a week’s notice. This is typically done for maintenance. There is a limit of 10 shutdown days per season.

Targeted Dispatch

Performance in Targeted Dispatch is calculated using a “last 10-of-10 baseline method” with a same-day adjustment, two hours before the start of the event. For non-battery resources, performance in Daily Dispatch is calculated using the same last 10-of-10 baseline method, but without a same-day adjustment. For battery resources, performance in Daily Dispatch Summer is calculated without either a baseline or a same-day adjustment.

Customers in this program will never be charged a fee for poor performance. However, since this is a pay-for-performance program, poor performance on any or all events will decrease the incentive amount paid. Not participating on an event may count as a zero for that event in the customer’s seasonal average performance calculation.

Baseline:

To calculate a customer’s performance during a demand response event, it is necessary to calculate what a customer’s typical power use is in order to estimate what the power use would have been if no demand response event was called.

ISO-NE uses a similar last 10-of-10 model in their active demand response programs. This method looks at the customer’s last 10 similar days. Similar days are of the same day type (weekday or weekend) that are not holidays and where no other DR event from either ISO-NE (OP4) or the program administrators was called. Days where a customer has a scheduled shutdown are not considered similar days. For shutdown days to be excluded from the baseline calculations, customer’s or their CSP must inform their program administrator of the shutdown with a week’s notice. There is a limit of 10 shutdown days per season.

Example of baseline set by loads in the 10 similar days before a DR event

Time Interval	10 similar days before event	...	2 similar days before event	holiday	weekend	weekend	Day of another DR event	1 similar day before event	Customer’s Baseline
Noon – 1pm	500kW	...	500kW	Not counted in average				500kW	500kW
2pm – 5pm	500kW	...	500kW					500kW	500kW

Weekend bonus uses the same procedure but only looks back at the last 5 similar days instead of 10.

Baseline Adjustment:

Demand response events are called during extreme weather (very hot or cold). The day of the event may be hotter/colder than the last 10 similar days, and the customer's load may be higher that day. To account for this, the baseline is adjusted to reflect to customer's load during the demand response event day. This is called the baseline adjustment. The baseline adjustment is the difference between the customer's average load during the hour starting the 2 hours before the event start and the load during the event day. However, the customer's load may be lower during an event day than the last 10 similar days because the customer is responding to the demand response event. Therefore, the adjustment can only be positive. It will never penalize the customer.

There is no baseline adjustment for Daily Dispatch.

Example of a same day baseline adjustment.

Time Interval	Customer's Baseline	Event Day Load	Baseline Adjustment
Noon – 1pm	500kW	600kW	100kW

Another example of a same day baseline adjustment.

Time Interval	Customer's Baseline	Event Day Load	Baseline Adjustment
Noon – 1pm	500kW	400kW	0 kW (not negative)

Demand Response Performance

Performance is calculated by subtracting the event day load during the demand response event from the sum of the customer's baseline and baseline adjustment.

Example of an event day performance:

Time Interval	Customer's Baseline	Event Day Load	Baseline Adjustment	Event Day Performance
Noon – 1pm	500kW	600kW	100kW	Performance = Baseline + Adjustment – Event Day
2pm – 5pm	500kW	400kW		500kW + 100kW – 400kW = 200kW

If the customer produces more energy than they consume during the baseline period or the event day through permitted and interconnect onsite generation or discharging energy storage, the net energy use will be used to calculate the customer's performance in the same process detailed above.

Curtailement Limit:

Although it is rare, sometime the baseline adjustment causes the baseline to be adjusted to a level higher than the customer ever uses. A customer cannot curtail more load than they use. To prevent this, the Event Day Performance must be smaller than the maximum load of the customer during the last 10 similar days. Performance for an individual demand response event is calculated by subtracting the customer's adjusted baseline power from average power (kW) use during the demand response event.



For example:

Time	Customer's Adjusted Baseline	Customer's Power Use During the DR Event	Performance
2pm to 3pm	500kW	400kW	100kW
3pm to 4pm	500kW	400kW	100kW
5pm to 6pm	500kW	400kW	100kW
Average Performance for Event			100kW

The Customer's Adjusted Baseline is calculated by taking the customer's average power use during the demand response event hours and adding the baseline adjustment. Performance during the demand response event is the average Customer's Adjusted Baseline minus the Customer's Power Use During the DR Event, over the whole event.

Negative performance is not penalized, for example:

Time	Customer's Adjusted Baseline	Customer's Power Use During the DR Event	Performance
2pm to 3pm	300kW	400kW	-100kW → 0
3pm to 4pm	500kW	400kW	100kW
5pm to 6pm	500kW	400kW	100kW
Average Performance for Event			$(0 + 100 + 100)/3 = 67kW$

Daily Dispatch

Customers, or their CSP, can choose to have the baseline and performance for Daily Dispatch calculated using utility meter data, or interval data directly from the asset. If asset-level data is chosen, this must be provided to the PA at the end of the DR season in the standard format.

Customer Interval Data

Except for storage for Eversource and Cape Light Compact customers, as described above, the interval data to be used to measure a customer performance in Targeted Dispatch must be measured at the utility meter.

For Cape Light Compact Customers

All participants are required to install metering capable of sending real time interval data to Cape Light Compact's demand response management platform. Cape Light Compact may waive this requirement at its sole discretion.

For National Grid Customers:

In most cases, the customer already has a utility interval meter that records and transmits the information needed to complete the performance calculations. If this is the case, no other metering is



required to participate in the program. All G-3 customers have this interval meter. Customers who do not have an interval utility meter may also participate in the program. The customer or the CSP must install a meter to measure the customer electrical load in at least 15-minute intervals for the entire demand response season. This data must be shared with the customer's program administrator at the end of the season. The cost for this added metering is the responsibility of the customer or its CSP.

For Eversource Customers:

All customers are required to install metering capable of sending real time interval data to Eversource. Customers may apply for an added incentive of up to \$1,500 per meter to pay for metering costs. Storage should be measured at the asset level. Refer to the Eversource application for more detail.

For Unitil Customers:

All customers are required to install metering capable of collecting interval data. Generally, Unitil will supply these types of meters. In the event these types of meters cannot be installed in a timely fashion, the CSP can supply such meters. Contact the CSP for the cost and a potential incentive from Unitil.

On-Site Generation

Some PAs allow customers to use onsite non-renewable generation for demand response. This includes backup generators, standby generators, co-generation, etc. However, in such cases, the generation asset must comply with all federal, state, and local laws and permitting required for operation and participation in demand response programs.

For Eversource customers:

Eversource may restrict the amount and/or type of generation participating in its Connected Solutions offering. Generators may be allowed to participate in targeted dispatch. Contact an approved CSP or Eversource for more information.

For Cape Light Compact customers:

Cape Light Compact may restrict the amount and/or type of generation participating in its Connected Solutions offerings. Contact an approved CSP or Cape Light Compact for more information.

For Unitil Customers:

Unitil may have some additional restrictions for on-site Generation. Contact the approved CSP or Unitil for more information.

Enrollment Process

To enroll in the program, the customer or their vendor must complete an application form. This form is available on the MassSave website here: <https://www.masssave.com/en/saving/business-rebates/demand-response-and-storage> and from the National Grid website here: <https://www.nationalgridus.com/MA-Business/Energy-Saving-Programs/ConnectedSolutions>. For Eversource customers

[Eversource customers should submit an application online, using Eversource's online portal. Most CSP's have login credentials and can submit an application on behalf of the customer. All other cases should email \[connectedsolutions@eversource.com\]\(mailto:connectedsolutions@eversource.com\) for instructions on how to obtain access to the portal:](#)



<http://eversourceconnectedsolutions.energydatametrics.com/Account/Login.aspx>.

More information about the program and its offerings is available at:

<https://www.eversource.com/content/ema-c/business/save-money-energy/manage-energy-costs-usage/demand-response>

Testing

A performance test events are not planned in this program. However, the program administrator may elect to run communication or performance tests to ensure all notification processes are functioning.

Terms and Conditions

These program materials and participation in **Connected**Solutions are pursuant to and subject to the Terms and Conditions in effect for customer applications at the time that the application is approved by the Program Administrator. See the **Connected**Solutions application for more details.