April PEX Meeting

April 16, 2024

Mathew McCarthy <u>mathew.mccarthy@nationalgrid.com</u>



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National Grid 2

01

Welcome and Introductions Mat McCarthy <u>mathew.mccarthy@nationalgrid.com</u>



Safety Mo Situations Gabriel Andre

Safety Moment – Dealing with Difficult People and Situations

Gabriel Andreson ganderson@inovisenergy.com





Introduction

Been attending PEX meetings for 23 years now!

I am the President and Co-founder of Inovis Energy and I also do Executive Coaching

Heady Content on LinkedIn for about 3 years

Safety Moment from a different angle

Dealing with the Dark Side of business (which is made up of people)

Lessons gleaned from my career in Energy Efficiency



A COUPLE OF EXAMPLES AN "EASY DIFFICULT" AND A "HARD DIFFICULT SITUATION"



#1 – BACK IN 2006 OR SO, DID A PROJECT FOR A FURNITURE MFG

(IS IT CODE TO HANG LIGHTS FROM SPRINKLER PIPE?

DIFFICULT SITUATION, BUT NOT PERSONAL



#2 - INOVIS WORKS WITH LOTS OF PARTNERS, PARTNERS THAT DON'T HAVE OUR EXPERTISE BUT BRING US INTO WORK

HOW DID I FEEL WHEN I REVIEWED MY PROPOSAL/REPORT?



THIS WAS A VIOLATION,
I FELT LIKE I HAD BEEN
ROBBED, USED, LIED
TO ETC ETC. BECAUSE I
HAD BEEN.

HOW DID I FEEL WHEN I REVIEWED THIS PROPOSAL/REPORT?





DEALING WITH THE DARKER SIDE OF BUSINESS

- Our first reaction to something like this is generally feelings of injustice and anger or anger first then injustice.
- These emotions are healthy and legitimate but they are to be moved through, vs. become pits of quicksand that we get stuck in.
- Our tendency can be to develop Resent
- If we get stuck in resent, it leads to **bitterness**. Bitterness and resent are dangerous to us, because their primary effect is on us. Bitterness and resentment lead to toxicity, which starts in us, then permeates the people and environment around us. DANGER!



DEALING WITH THE DARKER SIDE OF BUSINESS

WHAT'S THE DEFENSE AGAINST RESENT AND BITTERNESS FROM SPREADING TOXICITY IN AND THROUGH US?

4 THINGS!!!

- #1 PROCESS the violation/difficulty in a healthy way
 - Normalize your emotions, allow yourself to feel the pain of the offense, allow yourself to be angry, vent this out to someone that's trusted
 - As you move through those emotions, get to the other side by
- #2 FORGIVING THE OFFENSE. This is done by letting go of the person and releasing them from owing you anything and leaving it there. Remember, Forgiveness is for you not the offending party. It is the vehicle that brings you back to internal freedom.



DEALING WITH THE DARKER SIDE OF BUSINESS

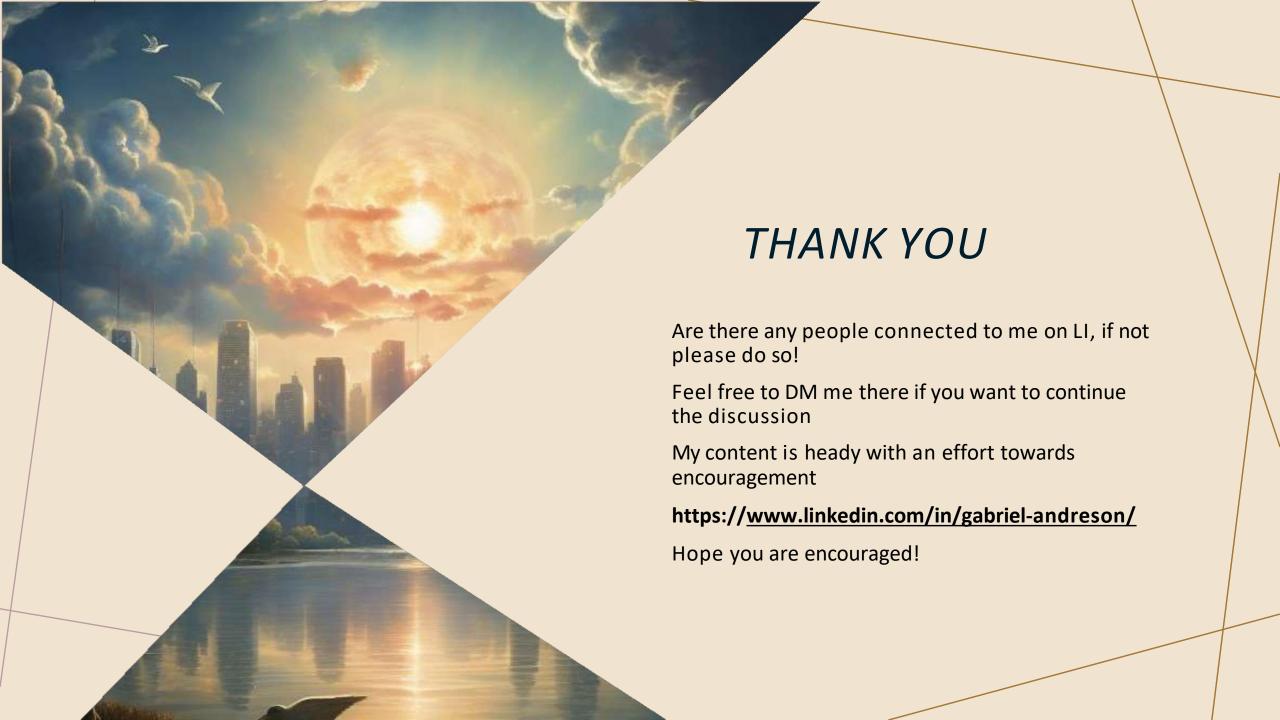
#3 is to set up BOUNDARIES, which like forgiveness, are in place for you not them

A boundary for me with the firm that stole our template is NOT doing business together again. It may
consist of going to court due to the violation of our agreement, but if we do decide to do that it will be
based in wisdom, not resent and bitterness.

A boundary for you may be:

- Not allowing someone to yell at you or speak to you in a certain way
- Not allowing someone to demand from you what's outside of your agreement
- Making a change by getting yourself out of a toxic work or home environment
- Both forgiveness and boundaries are designed for us to live healthy and well

#4 Let RUMINATING ON BAD THINGS teach you, that you need to work on this area. Don't allow yourself to ruminate or stew on bad things! If you find yourself there, employ GRATITUDE AS AN ACTIVE EXERCISE BECAUSE YOUR BRAIN CAN ONLY OCCUPY ONE SPACE at a time, GRATITUDE IS A HEALTHY SPACE TO LIVE FROM!



03

Weatherization Custom/Prescriptive Tool Update and Updates to C&I Incentives

Max Halik <u>maxwell.halik@nationalgrid.com</u>





















Wx Pre-2022

- Custom energy savings review for all projects
- Multiple site visits
- Weeks-long process
- Unpredictable incentives

Mass Save Wx Evolution



Wx Pre-2022

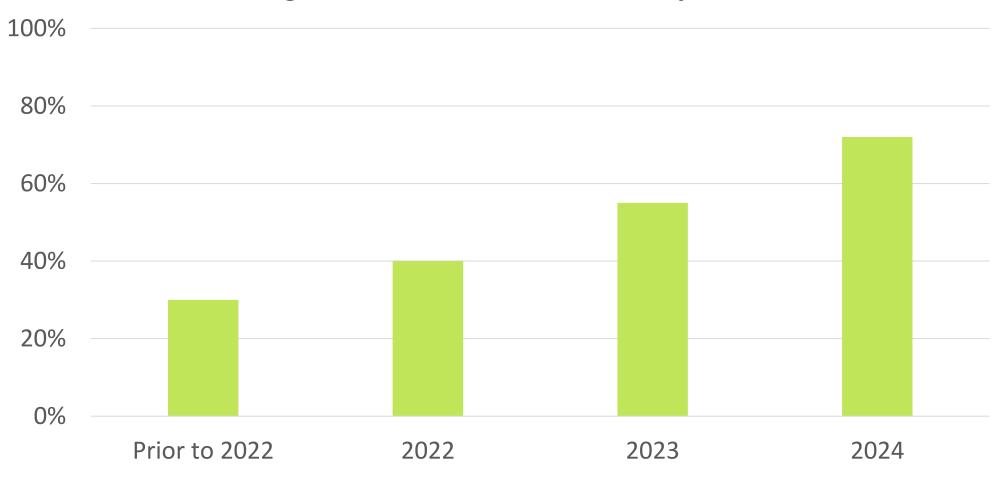
- Custom energy savings review for all projects
- Multiple site visits
- Weeks-long process
- Unpredictable incentives

Wx Now ('22 onward)

- New prescriptive Wx rebate process for small buildings
- Savings calculator tools to help for larger buildings
- Days-long process, or instant
- Fixed incentives for prescriptive projects
- Significantly higher incentives overall

Mass Save has meaningfully increased Wx incentives in recent years

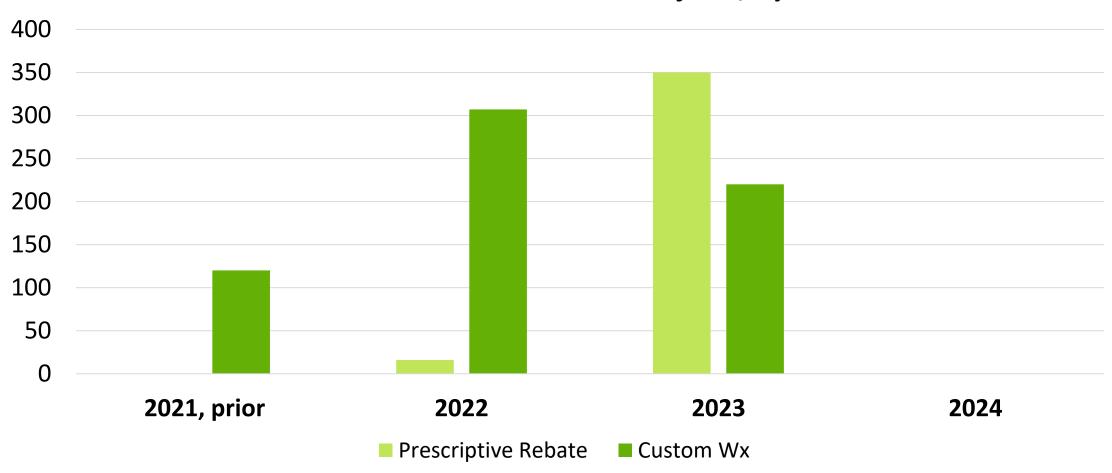
Percentage of Installed Cost Covered by Incentive*



^{*}Actual costs and incentives vary, approximate values only

Contractors and customers have responded to the new Wx

Mass Save Incentivized Wx Projects, by Year



Contractors and customers have responded to the new Wx

Mass Save Incentivized Wx Projects, by Year



Looking ahead: Mass Save Wx in 2024



- Overall higher incentives
- New prescriptive incentives for weatherstripping and basement insulation
- Incentives for barrier mitigation
 (asbestos/vermiculite, knob-and-tube wiring remediation)
- Single vendor calculator tool, guiding through through the process

Looking ahead: Mass Save Wx in 2024



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 (asbestos/vermiculite, knob-and-tube wiring remediation)
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Commercial Pre-Weatherization Rebate Knob & Tube, Asbestos, or Vermiculite Mitigation

This offer is to assist **commercial and industrial properties** with the cost of knob and tube, asbestos and/or vermiculite abatement where it prevents the installation of insulation or air sealing work.

ENERGY SPECIALIST OR WEATHERIZATION CONTACTOR TO COMPLETE - BARRIERS IDENTIFIED:

A weatherization work scope has been developed, but knob and tub wiring, asbestos, and/r vermiculite has been observed in the following work area(s) and will need to be removed before the work can be completed (check all that apply):

Knob & Tube Wiring: Attic	Exterior Walls Basement Ceiling	Crawlspace Other:	
Asbestos/Vermiculite: Attic	Knee Wall Space Other:		















PRE-WEATHERIZATION BARRIER MITIGATION REBATES:				
For Commercial Buildings <8,000 sf	Total Rebate Cap of \$16,000	Total Measure Cap		
Asbestos/Vermiculite Mitigation	\$1 per square foot	\$4,000		
Knob and Tube – Verification	-	\$2,000		
Knob and Tube – Rewiring	\$3 per square foot	50% of rewiring cost		
For Commercial Buildings >8,000 sf	Total Rebate Cap of \$30,000	Total Measure Cap		
Asbestos/Vermiculite Mitigation	\$1 per square foot	\$10,000		
Knob and Tube – Verification	-	\$4,000		
Knob and Tube – Rewiring	\$3 per square foot	50% of rewiring cost		

















PRE-WEATHERIZATION BARRIER MITIGATION REBATES:				
For Commercial Buildings <8,000 sf	Total Rebate Cap of \$16,000	Total Measure Cap		
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Knob and Tube – Verification	-	\$4,000		
Knob and Tube – Rewiring	\$3 per square foot	50% of rewiring cost		

PRE-WEATHERIZATION BARRIER MITIGATION INCENTIVE CALCULATION:				
Building Square	Measure	Square Footage of	Installed Cost of	CALCULATED
Footage (fill in)		Measure (fill in)	Measure (fill in)	<u>REBATE</u>
5,001	Asbestos/Vermiculite Mitigation	1000	\$ 3,000.00	\$ 1,000.00
-,	Knob and Tube – Verification	(n/a)	\$ 500.00	\$ 500.00
	Knob and Tube – Rewiring	2000	\$ 10,000.00	\$ 5,000.00

WE ARE MASS SAVE*:

Total Rebate:

\$ 6,500.00















PRE-WEATHERIZATION BARRIER MITIGATION REBATES:				
For Commercial Buildings <8,000 sf	Total Rebate Cap of \$16,000	Total Measure Cap		
Asbestos/Vermiculite Mitigation	\$1 per square foot	\$4,000		
Knob and Tube – Verification	-	\$2,000		
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PRE-WEATHERIZATION BARRIER MITIGATION INCENTIVE CALCULATION:				
Building Square Footage (fill in)	Measure	Square Footage of Measure (fill in)	Installed Cost of Measure (fill in)	CALCULATED REBATE
10,000	Asbestos/Vermiculite Mitigation	4000	\$ 6,000.00	\$ 4,000.00
,	Knob and Tube – Verification	(n/a)	\$ 500.00	\$ 500.00
	Knob and Tube – Rewiring	2000	\$ 18,000.00	\$ 6,000.00

WE ARE MASS SAVE*:

Total Rebate:

\$ 10,500.00











- Simple rebate form
- Needs to be associated with active weatherization work
- Abatement projects require pre-approval prior to work
- Typical documentation requirements
- Currently finalizing form (with built-in incentive calculation), updating website – hope to be live for NG by May/June



























Combined Weatherization Tool



- Difficulties in navigating prescriptive vs. custom
- Uncertainties about different approaches in calculating savings between projects
- A single calculator tool for all weatherization projects
 - "Turbotax for weatherization"













Combined Weatherization Tool

















Combined Weatherization Tool



- Currently testing for bugs aiming to release by Apr/May (with training to be scheduled)
- Will replace prescriptive calc v2.4 and custom calc v3.3 as single weatherization calculator
- No significant changes to savings calcs or overall weatherization incentives, more of a streamlined input
- Questions/Comments















Thanks for listening.

Feel free to reach out with any further questions:

maxwell.halik@nationalgrid.com











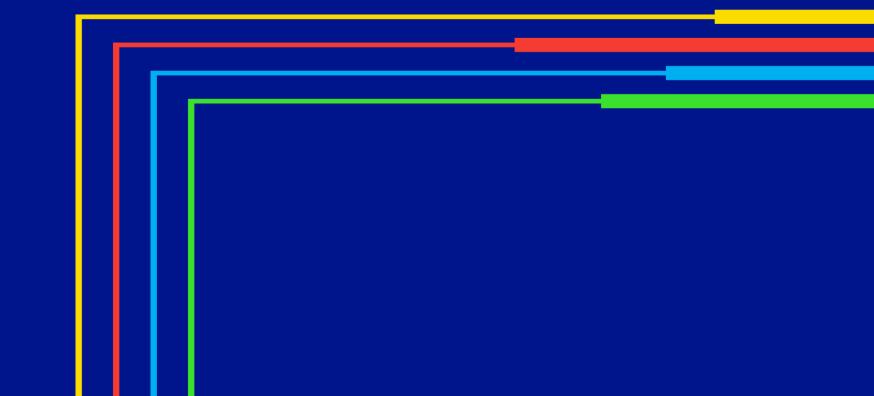


04

Demonstration of the Latest Account Rep Lookup Tool Mat McCarthy mathew.mccarthy@nationalgrid.com



05 Break



Building Operator Certification (BOC) Program Rob Brandt robert.brandt@nationalgrid.com



Building Operator Certification® (BOC) THE ESSENTIAL CREDENTIAL

- Leading training and credentialing program for building engineers and maintenance personnel
- Graduates gain skills to make their buildings more:
 - Comfortable
 - Efficient
 - Environmentally friendly
- Graduates help their organizations substantially cut operating costs (as much as \$20,000 per year)

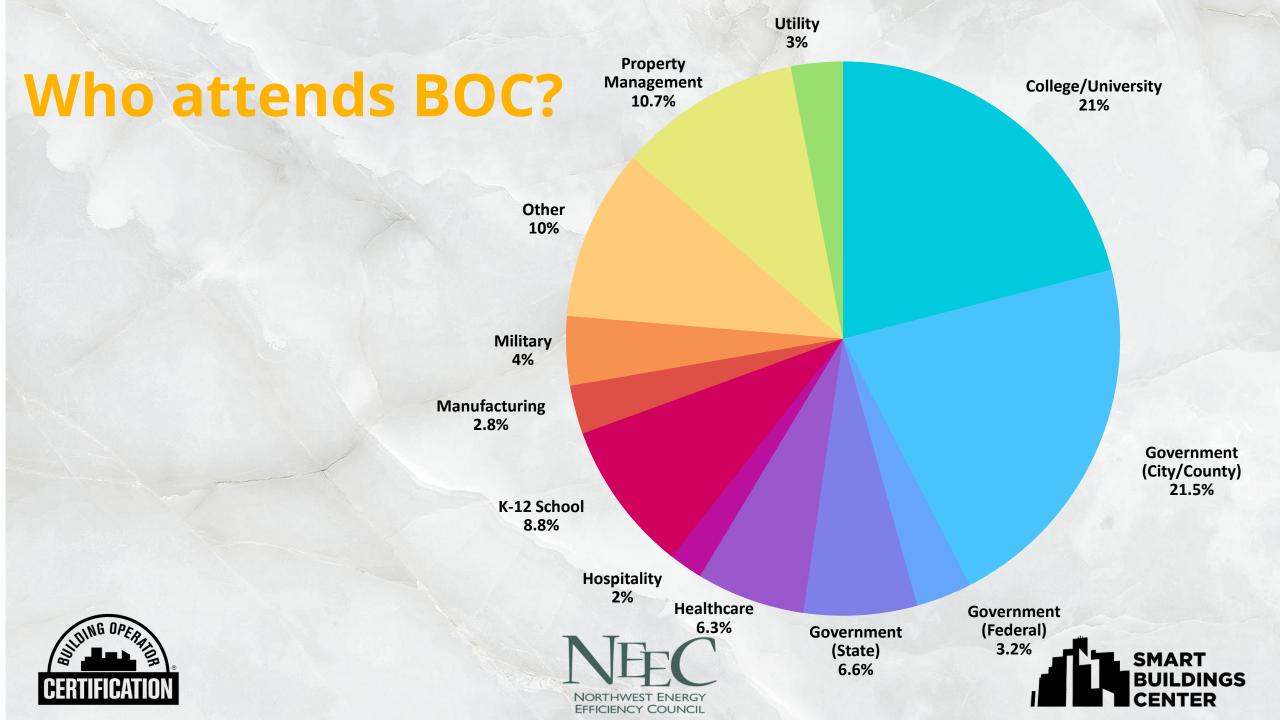






Photo courtesy of Resource Media





Three levels of training demonstrate different job performance outcomes:

Fundamentals of Energy Efficient Building Operations:

- Achieve general awareness of facilities and instill efficiency ethic
- Strengthen building optimization skills
- Identify areas for energy savings
- Make energy-smart decisions in day-to-day task

Level I:

Building Systems Maintenance

- Foundational understanding of electrical, HVAC and lighting systems and controls.
- Benchmark building energy consumption
- Identify low-cost/no-cost operations improvements
- Establish or review preventative maintenance program

Level II:

Efficient Operations

- Advanced building energy consumption analysis
- Optimizing HVAC controls for efficiency
- Advanced skills in equipment operations and functional testing
- Water use efficiency
- Presentation skills







Fundamentals of Energy Efficient Building Operations



Part 1: Energy Efficiency and Sustainability Overview



Part 2: HVAC Fundamentals



Part 3: Lighting Fundamentals



Part 4: Energy Conservation Opportunities



Part 5: Indoor Environmental Quality



Part 6: Measuring and Benchmarking Energy Performance



Part 7: Conclusion: Putting It All Together







Level I Knowledge & Skills

BOC 1001 - Energy Efficient Operation of Building HVAC Systems

BOC 1002 - Measuring and Benchmarking Energy Performance

BOC 1003 - Efficient Lighting Fundamentals

BOC 1004 - HVAC Controls Fundamentals

BOC 1005 - Indoor Environmental Quality

BOC 1006 - Common Opportunities for Operational Improvement

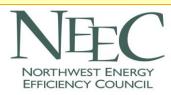
Supplemental Classes: Electrical Systems, O&M for Sustainable Buildings, High Performance HVAC, Smart Buildings Fundamentals

BOC 1014 - Electrification and Building Operations



- 74 hours of training
- 5 application projects
- 700 pages of reference books







Level II Classes

BOC 2001 - Building Scoping for Operational Improvements

BOC 2002 - Optimizing HVAC Controls for Energy Efficiency

BOC 2003 - Introduction to Building Commissioning

BOC 2004 - Water Efficiency for Building Operators

BOC 2005 - Project Peer Exchange: Present Your Final Report

Supplemental Classes: Preventive Maintenance & Troubleshooting Principles, Motors in Facilities, Advanced Electrical Systems Diagnostics, Mastering Electric Control Circuits, Enhanced Automation

and Demand Reduction

- 61 hours of training
- 5 application projects
- 600 pages of reference books









BOC PROGRAM

BOC Credential Structure







FUNDAMENTALS OF ENERGY EFFICIENT BUILDING OPERATIONS CERTIFICATE



LEVEL I
TRAINING CERTIFICATE
OF COMPLETION (TCOC)



LEVEL II
TRAINING CERTIFICATE
OF COMPLETION (TCOC)

CERTIFICATION



EXAM

BOC CERTIFICATION









Who is eligible for BOC?

Fundamentals: An interest in pursuing a career in building operations/energy management

Level I: Two or more years work experience in operation, maintenance or energy management of commercial facilities, or combination of education and experience

Level II: 3+ years' experience in the field with a technical college degree; 4+ years' experience and completion of BOC Level I



Photo courtesy of Resource Media

Who attends?

Operating engineers, Maintenance mechanics, HVAC technicians, Electricians, Controls techs, Building managers, Engineering project managers







To Earn Your Training Certificate of Completion (TCOC)

- Attend BOC classes
- Earn a passing score of >70% on all in-class tests
- Complete in-facility project assignments
- Submit a Training Certificate of Completion Application



Photo courtesy of Resource Media







To Earn BOC Certification

- Hold a BOC Level I TCOC or complete equivalent training.
- If you successfully pass the exam (67%), you will obtain the BOC
 Certification credential and use the Certified Building Operator (CBO)
 designation
- BOC's Certification program is aligned with International Standards
 Organization (ISO) 17024
- Assures valid and verified assessment of knowledge and skills in energy efficient building operation – gives BOC graduates even more of a competitive advantage in the industry.







Maintaining Your BOC Credential

- BOC will notify you in advance
 - January of year you are due for maintenance
 - Maintenance fee is \$75
- Requires five points each year for Level I TCOC, ten points for Level II
- Certification auto renews with TCOC
- Not required for Fundamentals certificate

BOC® Credentials | Learn. Lead. Sustain.

EARN IT

- Welcome letter
- Notification to employer
- Certificate
- Wallet card and clothing patch
- Online BOC registry
- Subscription BOC Bulletin

MAINTAIN IT

- Annually by March 31
- Continuing Education
- Annual Maintenance points
 - 5 Level I TCOC or Certification
 - 10 Level II TCOC
- Learn, Lead, Sustain







Building Operator Certification (BOC)

Tuition Reimbursement Award Application

BOC Training

1. APPLICATION INFORMATION (please print)

Is your organization a National Grid customer? Yes No

Complete an application for each eligible BOC graduate in your organization. Eligible graduates are those whose organization has not participated in the course in the last 5 years and are in a facilities management position.

GRADUATE NAME	JOB TITLE		
GRADUATE EMAIL ADDRESS	GRADUATE PHONE NUMBER		
SUPERVISOR NAME	JOB TITLE		
SUPERVISOR EMAIL ADDRESS	SUPERVISOR PHONE NUMBER		
ORGANIZATION NAME	SQUARE FOOTAGE OF FACILITY		
ORGANIZATION MAILING ADDRESS	CITY	STATE	ZIP

Electric Gas

Both Electric and Gas

All of the information in this application (including any associated worksheets) is correct to the best of my knowledge.

2. APPLICATION SIGNATURE

SUPERVISORS SIGNATURE	DATE	
MAKE REIMBURSEMENT AWARD CHECK PAYABLE TO: (REIMBUR	SEMENTS ARE MADE TO ORGANIZATIONS ONLY)	
MAIL REIMBURSEMENT AWARD CHECK TO (PROVIDE FU	ILL ADDRESS)	

www.nationalgridus.com

Tuition Reimbursement Award Application (continued)



Up to 50%Tuition Reimbursement Available

National Grid will pay up to 50% tuition reimbursement to one facilities management professional per commercial customer facility within a five-year period provided that the facilities management professional graduates from a Building Operator Certification ("BOC") Level 1 course and commercial customer facility meets the requirements. Tuition reimbursement is available for facilities management professionals who (i) graduate from the BOC Level 1 course; (ii) are National Grid commercial customers or employed by one of those commercial customers; and (iii) have not taken the BOC Level 1 course within the last 5 years.

Facility management professionals must work at a commercial customer facility in a facilities management position, e.g., as a facility manager, energy manager or in a role to reduce building-wide energy consumption. The commercial customer facility must have a minimum of 50,000 sq. ft. of conditioned building space. National Grid may, in it's sole discretion, modify or terminate this offer for tuition reimbursement at any time without notice. Reimbursements are provided to companies or organizations and cannot be dispersed to individuals only.

3. TUITION REIMBURSEMENT AWARD INFORMATION

Your organization must be a customer of National Grid to apply for the award(s). Please check the box next to the actions below for which you completed at your facility as part of the BOC training curriculum. Standard reimbursement award is up to 50% of tuition per BOC graduate*. Please check all that apply.

The items listed below must be included to meet requirements for Energy Project Analysis.

Project description

Customer measure estimated total cost

Annual bill savings based on energy savings calculations

Annual demand and energy savings including assumptions and calculations

Cost benefits/Payback analysis

Completed rebate forms and any required documentation

Level 1 scoping study

4. RETURN COMPLETED APPLICATION AND REQUIRED DOCUMENTATION TO:

National Grid Attention: Rob Brandt Senior Specialist, Project Management robert.brandt@nationalgrid.com

Overview of Recent Successful Electrification Projects Dan Sancomb daniel.sancomb@nationalgrid.com



Erving Paper Mill



56 Tons of Variable Refrigerant Flow VRF Heat pumps

Customer had an aging oil boiler

Ability to have air conditioning was a key benefit

National Grid funding PLUS
On Bill Repayment Program pushed this over the finish line

Toshiba / Carrier equipment make



Karl Storz, Charlton Ma



58 Tons of VRF heat pumps

Custom application
Connected to outside air unit for clean room

Electrifies propane from boiler plant

Key benefit for the customer is to better control climate in the clean room and help to achieve sustainability goals for the customer.

LG equipment

nationalgrid

Seaman Paper, Gardner Ma



41 tons combination of VRF and air source heat pump

Electrification of oil

Key benefit for customer manufacturing process requires tight climate control

Samsung equipment



Butternut Ski Resort



Electrification of snow making compressors

4 X 300 HP compressors

Electrification of diesel

Custom industrial application



Forklift Program





Electric lift must have propane counterpart

Lithium or lead acid battery qualifies

Lease OR Purchase accepted



PEX Competition Results Mathew McCarthy Mathew.McCarthy@nationalgrid.com



2023 PEX Competition Results

Most comprehensive electric energy efficiency project:

1st Place: Inovis Energy

2nd Place: Energy Conservation

Most electrification applications displacing delivered fuels (oil and propane):

1st Place: Energy Source

• 2nd Place: Guardian

Most efficient use of incentives for all natural gas energy efficiency applications:

1st Place: ENE Systems



PEX Program Updates/Reminders Mathew McCarthy Mathew.McCarthy@nationalgrid.com



2023 PEX Survey Result

- Received feedback from 5 different PEXs (7 Responses Total). Majority of feedback was positive.
 Requests from PEXs included:
 - More case studies focused on electrification for LCI gas/electric customers (IE Healthcare and Manufacturing customers)
 - Increased access to account representatives and project reviewers
 - Simplified incentive structure and faster review times
 - More leads
 - Co-branded marketing materials
 - More in-person meetings
 - Job aids to support incentive calculators
 - Access to InDemand gas module
 - More training:
 - CEA/CEM Certifications
 - BERDO/BEUDO
 - Battery Storage
 - VRF

National Grid

2024 PEX Goals

• National Grid has finalized the 2024 LCI/Muni Goals for gas EE, electric EE, gas electrification, and electric electrification. Individual PEX goals will be finalized in May and emailed to each PEX.

Key Performance Indicators	Goal	Paid (2023)	P(%G)	Paid (2024)	Paid/Pipeline (2024)
Electric Savings (NLT MWH)	157,360	107,813	69%	8,755	162,100
Gas Savings (NLT Therms)	2,202,009	811,632	37%	62,167	1,162,000
Electric Electrification (NLT MMBTu)	12,345	9,172	74%	384	18,150
Gas Electrification (NLT MMBTu)	35,445	80,405	227%	6,134	60,225

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Quick Hits – Reminders

Upcoming Trainings

- Mass Save events and training can be found <u>here</u>.
- MAEEP
 - <u>Commercial Energy Auditing</u> May 14th @ 8:30AM-4:00PM. Venue Sheraton Four Points, 1125 Boston-Providence Turnpike, Norwood MA 02062
 - <u>Building Envelope Assessment Training</u> June 4th and June 5th @ 8:30AM-4:00PM. Venue Sheraton Four Points, 1125 Boston-Providence Turnpike, Norwood MA 02062
- BMS Trainings Mass Save is offering two training options to go over the 2024 Prescriptive BMS program and tool changes. These sessions are virtual and will have a technical focus with a demonstration of the updated tool. The first training session is on 4/18 at 10-11 a.m. The other session is on 4/22 at 1-2 p.m. and will cover the same information. All PEXs should have received a teams invite to these sessions. If you did not receive the invite, please contact Mathew.mccarthy@nationalgrid.com. There are some fairly extensive updates to the program compared to 2023 including:
 - Changes to project type and incentive structures
 - Inclusion of Subscription System Control Products
 - Inclusion of Tune Ups for existing sequences
 - Expansion of eligible HVAC equipment
- NEBFM 2024 -The 18th Annual Northeast Buildings & Facilities Management Conference is scheduled to take place April
 23rd & 24th at the DCU Center in Worcester, MA. If you are interested, please click here to register.

Quick Hits – Reminders

Commercial Heat Pump Application Reminder

Commercial Heat Pump Application Reminder –All PEXs should be using the National Grid 2024 Commercial Heat
Pump Application for LCI/Muni heat pump projects. PEX apps will all be processed by National Grid (NO THIRD
PARTY). If you are doing any heat pump projects in National Grid territory and National Grid is issuing the rebate,
please work with your sales rep to get the rebate processed. If you do not know who your rep is, please reach out to
me and I will connect you.

PEX InDemand Applications

- All PEX Gas Applications and Associate PEX Applications —If you are submitting a gas application or if you are an associate PEX, please note your PEX status when emailing your National Grid sales rep applications and associated documentation. This will help ensure the application is entered as a "PEX" application so it will show up in our PEX reporting.
- InDemand Project Entry –Please be advised that there has been a recent update to InDemand. As a result, new applications will require populating the "QA Reviewer" field. If you are a lead PEX, please select Jean Mangini (mangin) as the QA reviewer on all electrical PEX applications.

PEX 1:1s

Contact Mat to schedule your 1:1

Quick Hits - Reminders

Green Communities Updates

Key dates/deadlines for Green Communities (GC) are available <u>here</u>.

New PEX Program Employees

- Background Check New PEX employees require Level 2 background checks (with 4-panel drug screening) if they have direct contact with National Grid customers on their property and/or access National Grid database. Contact Accurate Background checks for more details.
- **Distribution List** Contact Mat to be added to the PEX distribution list to receive meeting invites, training notices, newsletters, etc.
- InDemand Training Contact Mat to coordinate InDemand training as needed.

Mass Save Quick Tools and Resources

• The Mass Save website has been updated with a <u>Business Quick Tools and Resources Page</u>. This page provides links to incentive applications, tools for equipment and system performance optimization, calculators, and more!

Project Expediter Landing Page

www.nationalgridus.com/MA-Project-Expediter-Program

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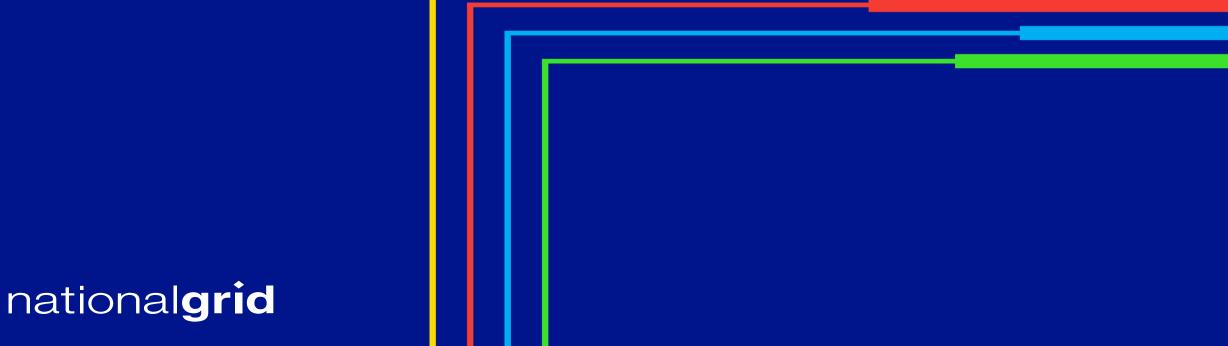
2024 Meeting Dates

Meeting Schedule

- May 22, 2024
- June 26, 2024
- July 24, 2024
- August 21, 2024
- September 18, 2024
- October 23, 2024
- November 20, 2024

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Lunch and Networking



Thank You!

Be Safe

