



The Commonwealth of Massachusetts

DEPARTMENT OF PUBLIC UTILITIES

MEMORANDUM

TO: All Municipal Aggregators

FROM: Jessica Ellis, Hearing Officer

RE: Reporting Procedures - 2018 Municipal Aggregation Annual Reports to the Department of Public Utilities, D.P.U. 19-MA

DATE: November 28, 2018

CC: Mark D. Marini, Secretary
Daniel Burstein, Esq., Department of Energy Resources
Ashley Gagnon, Esq., Assistant Attorney General

I. INTRODUCTION

Each municipality with an approved municipal aggregation plan must submit an Annual Report to the Department of Public Utilities (“Department”). The required contents of the Annual Report have changed over time as the Department has gained experience with the operation of municipal aggregation programs. See e.g., Town of Avon, D.P.U. 17-182, at 20 (2018). Each municipality must file its 2018 Annual Report consistent with the content and form described in the sections below.

Previous Annual Reports have been due on or before December 1st of each year. In order to allow for reporting of data for the full calendar year, Annual Reports shall now be due on or before March 1st of each year. Annual Reports for 2018 are due on or before **March 1, 2019.**¹

¹ To the extent a recently-approved municipal aggregation program is not fully operational prior to December 31, 2018, the municipality should so indicate in its Annual Report.

II. REPORTING REQUIREMENTS

Each Annual Reports shall contain, at a minimum, the following information:

1. a list of the program's competitive supplier(s) over the past year;
2. the term of each electric service agreement;
3. monthly enrollment statistics by customer class, including customer additions and withdrawals;
4. the number and percentage of customers that opted-out of the program over the past year;
5. a brief description of any renewable energy supply options included in the program;
6. a detailed discussion, including all relevant documentation, addressing the municipality's and competitive supplier's compliance with the alternative information disclosure strategy approved pursuant to 220 CMR 11.08 in the relevant final order approving the program;
7. evidence documenting that the municipality has fully complied with all provisions contained in its public education plan, including, at a minimum, copies of all opt-out notices and other correspondence with eligible customers and program participants, copies of city or town government meeting notices, minutes of any such meetings, and screenshot images of all relevant pages of the websites of the municipality and municipal aggregation consultant; and
8. copies of any complaints received by the municipality, the municipal aggregation consultant, or the competitive supplier regarding the program.

III. FILING REQUIREMENTS

To facilitate the filing of the 2018 Annual Reports, the Department has established docket D.P.U. 19-MA.² Each municipality must file its Annual Report for 2018 in D.P.U. 19-MA and include a reference to the docket in which its current municipal aggregation plan was approved.

² This docket is for information purposes only and is not a Department investigation.

One original hard copy of each Annual Report must be filed with Mark D. Marini, Secretary of the Department. Annual Reports for 2018 must be received by the Department before the close of business (5:00 p.m.) on **March 1, 2019**.

Each Annual Report also must be submitted to the Department in electronic format using one of the following methods: (1) by e-mail attachment to dpu.efiling@mass.gov; (2) on a CD-ROM or USB drive. The text of the e-mail, CD ROM, or USB drive must specify: (1) the docket number of the proceeding (D.P.U. 19-MA); (2) the name of the municipality filing the Annual Report; and (3) a brief descriptive title of the document (*i.e.*, “2018 Municipal Aggregation Annual Report of [municipality]”). The electronic filing should also include the name, title, and telephone number of a person to contact in the event of questions about the filing. The electronic file name should identify the document, but should not exceed 50 characters in length. All documents submitted in electronic format will be posted on the Department’s website: <https://eeaonline.eea.state.ma.us/DPU/Fileroom> (enter “19-MA”).

Each individual Annual Report must be electronically filed in searchable, PDF format. Consultants filing as agents on behalf of multiple municipalities should not combine individual Annual Reports into one paper and/or electronic filing.

In addition to searchable PDF format, data responses to items (3) and (4) above should be filed using the a reporting template in Microsoft Excel Format with all formulae and cell references intact. The Department will provide this template under separate cover.