

**NSTAR ELECTRIC COMPANY
D/B/A EVERSOURCE ENERGY**

**MASSACHUSETTS ELECTRIC COMPANY AND
NANTUCKET ELECTRIC COMPANY
D/B/A NATIONAL GRID**

**FITCHBURG GAS AND ELECTRIC LIGHT COMPANY
D/B/A UNITIL**

AMI STAKEHOLDER GROUP

PROGRESS REPORT

D.P.U. 21-80/81/82

MAY 15, 2023

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Introduction

On November 30, 2022, the Department of Public Utilities (the “Department”) approved the 2022-2025 Grid Modernization Plans filed by NSTAR Electric Company d/b/a Eversource Energy (“Eversource”), Massachusetts Electric Company and Nantucket Electric Company each d/b/a National Grid (“National Grid”), and Fitchburg Gas and Electric Light Company d/b/a Unital (“Unital”) (together, the “Companies” or the “EDCs”). The Department’s November 30, 2022 Order approving the Companies’ 2022-2025 GMPs included a directive for the Companies to convene a stakeholder group no later than February 1, 2023 to address issues related to the Companies’ advanced metering infrastructure (“AMI”) implementation plans approved by the Department in its Track 2 Order (the “AMI Stakeholder Group”). D.P.U. 21-80-B/21-81-B/21-82-B at 325-326. The objective of the AMI Stakeholder Group is “to provide a forum for the Companies and interested stakeholders to collaborate in a non-adjudicatory setting to discuss AMI-related issues and to develop a joint proposal for Department review... .” Id. The Department identified the following issues as areas of focus: “(1) customer and third-party access to customer usage data; (2) customer education and engagement; (3) billing of TVR offered by competitive suppliers; and (4) AMI deployment strategies that may expedite the ability for competitive suppliers to offer TVR products.” Id.

The EDCs commenced the AMI Stakeholder Group process with an initial “kick-off” meeting on January 31, 2023. To date, the EDCs have facilitated two additional meetings on March 28, 2023 and April 25, 2023. As discussed in more detail below, these initial meetings have focused on establishing a process for the AMI Stakeholder Group, identification of a schedule to discuss the key issues identified by the Department and principles to support supplier TVR offerings.

The Department further directed the EDCs to submit quarterly status reports, beginning on May 15, 2023, that include the following: (1) a list of stakeholders and attendees; (2) the status of any discussions and the process by which such discussions occurred; and (3) a summary of all issues on which the Companies and stakeholders have reached consensus. D.P.U. 21-80-B/21-81-B/21-82-B at 326. Accordingly, the EDCs submit this first quarterly report. The EDCs will submit their next quarterly report on or about August 15, 2023.¹

Section I: Participating Stakeholders

The Department stated that the objective of this AMI Stakeholder Group is to provide a non-adjudicatory setting for the Companies and stakeholders to collaborate and discuss AMI-related issues and to develop a joint proposal for Department review. D.P.U. 21-80-B/21-81-B/21-82-B at 326. This joint proposal should identify areas of consensus and outstanding issues that remain unresolved. Id. With respect to participation in the AMI Stakeholder Group, the Department included the following directives: (1) the Companies should designate personnel responsible for oversight and management of the stakeholder process; (2) the EDCs should recognize all entities on the service lists for D.P.U. 21-80, D.P.U. 21-81, and D.P.U. 21-82 as

¹ The EDCs anticipate submitting quarterly reports to the Department pursuant to the following schedule: May 15, 2023, August 15, 2023, November 15, 2023, February 15, 2024, and May 15, 2024. A final status report will be submitted on August 1, 2024 pursuant to the Department’s directives. D.P.U. 21-80-B/21-81-B/21-82-B at 326.

stakeholder participants and ensure that each stakeholder participant is included on correspondence related to the AMI Stakeholder Group and its process; and (3) the Companies should identify, solicit, and allow other interested stakeholders to participate in the AMI Stakeholder Group (even if such stakeholders had not participated in dockets D.P.U. 21-80, D.P.U. 21-81, and/or D.P.U. 21-82). Id. at 326-327.

The Department also stated that “as the state energy policy office, [the Department] anticipate[s] that [Department of Energy Resources] will play a leading role, particularly in the development of a statewide data access strategy.” D.P.U. 21-80-B/21-81-B/21-82-B at 326 (citations omitted). Accordingly, the Companies engaged with DOER prior to commencing the AMI Stakeholder Group to discuss a schedule and identify potential stakeholder group participants.

On January 27, 2023, the EDCs sent an email to the service lists for each of the 2022-2025 GMP services lists (D.P.U. 21-80, D.P.U. 21-81, and D.P.U. 21-82). The Companies also provided notice of the AMI Stakeholder Group to competitive suppliers and municipal aggregators operating in their respective service territories and to entities identified through collaboration with DOER. The EDCs and DOER identified these additional entities as potentially interested parties based on the entities’ mission. This January 27, 2023 email is provided as Attachment A² and served as notice of the date for the initial “kick off” AMI Stakeholder Group meeting. The email also provided the relevant excerpt of the Department’s Order D.P.U. 21-80-B/21-81-B/21-82-B and requested confirmation that recipients (or their organization) intended to participate and if so, requested appropriate contact information.

The EDCs held the first AMI Stakeholder Group meeting on January 31, 2023. At the outset of this first meeting, the Companies reiterated that any stakeholders wishing to participate should provide their contact information for inclusion on meeting invitations and the electronic distribution list for meeting materials (e.g., agendas, presentations).

A copy of the AMI Stakeholder Group participant list as of May 11, 2023 is provided as Attachment B to this report.

Section II: AMI Stakeholder Group Meetings

A. January 31, 2023 Meeting

A copy of the January 31, 2023 AMI Stakeholder Group meeting agenda is included in Attachment C of this report. As set forth in the agenda, the January 31, 2023 meeting began with introductions and an overview of the Department’s directives. Each of the EDCs provided a brief overview of their AMI implementation plans, including the implementation timeline.

Following this overview, the AMI Stakeholder Group discussed prioritization of the four topics identified by the Department as AMI Stakeholder Group focus areas. As noted above, the four topics identified by the Department are: (1) customer and third-party access to customer usage data; (2) customer education and engagement; (3) billing of time varying rates (“TVR”) offered

² The EDCs’ January 27, 2023 email included the relevant excerpt of the Department’s Order issued in D.P.U. 21-80/81/82 directing the EDCs to convene this stakeholder group. This excerpt is included as part of Attachment A.

by competitive suppliers; and (4) AMI deployment strategies that may expedite the ability for competitive suppliers to offer TVR products. D.P.U. 21-80-B/21-81-B/21-82-B at 327. At the January 31, 2023 meeting, the EDCs proposed beginning discussions with issues related to TVR billing.

The EDCs explained that TVR billing is appropriate to address as the first issue because upgrades to the Companies' customer information systems ("CIS") and/or other information technology ("IT") systems are a component of the AMI implementation plans. Decisions regarding TVR billing have the potential to impact the configuration of these systems and any changes necessitated by the outcome of TVR billing discussions will be easier to address early on in the process. Stakeholders provided initial feedback on this proposal.

The AMI Stakeholder Group also reached consensus on the following items: (1) each topic identified by the Department will be afforded equal time during the process; and (2) the EDCs will provide an overview for each of the four topics to establish scope and common understanding of definitions during future meetings.

Finally, the AMI Stakeholder Group participants also discussed a process for facilitating the meeting including through establishment of ground rules. At the conclusion of the first meeting, the EDCs committed to memorializing these ground rules. The EDCs also advised that the Companies are considering hiring a third-party facilitator to perform administrative functions associated with the AMI Stakeholder Group (taking meeting minutes, ensuring that discussion follows the agenda, maintaining a sharepoint with group files, and serving as a point of contact for participants).³

B. March 28, 2023 Meeting

A copy of the March 28, 2023 AMI Stakeholder Group agenda is included in Attachment B of this report. As set forth in the agenda, the meeting began with a review of the ground rules. The EDCs circulated a draft of the ground rules in advance of the March 28, 2023 meeting. The Stakeholder Group reviewed edits received from DOER; these edits were accepted and the ground rules will inform the process for all future AMI Stakeholder Group meetings. The AMI Stakeholder Group ground rules are provided as Attachment D. After reaching consensus on the guidelines, the EDCs addressed DOER's request for additional information regarding the EDCs' proposal to focus first on issues related to TVR billing. Following this discussion, participants agreed to move forward with TVR as the first topic of substantive discussion.

The EDCs kicked off the discussion of TVR billing issues with a presentation to address TVR guiding principles and key discussion points. A copy of the March 28, 2023 EDC presentation is provided as Attachment E to this report. As summarized in the March 28, 2023 meeting minutes, stakeholders provided feedback throughout the presentation and determined that the April 28, 2023 AMI Stakeholder Group meeting would focus on additional feedback to the

³ As of the date of this report, the EDCs have not yet retained a facilitator but continue to explore this option. In the meantime, the EDCs' counsel have continued to facilitate the meetings and serve as a point of contact.

EDCs' March 28, 2023 presentation. A copy of the March 28, 2023 meeting minutes are provided as Attachment F to this report.

C. April 25, 2023 Meeting

A copy of the April 25, 2023 AMI Stakeholder Group agenda is included in Attachment B of this report. As set forth in the agenda, the meeting began with a discussion of the EDCs' Guiding Principles for billing of TVR offered by competitive suppliers as presented during the March 28, 2023 meeting. The AMI Stakeholder Group then discussed and provided additional feedback on the EDCs' TVR discussions points presented at the March 28, 2023 meeting.

The last category of discussion was feedback on the EDCs' proposed statement of scope including review of proposed edits from AMI Stakeholder Group participant Green Energy Consumers Alliance ("GECA").

Based on discussions, GECA, the Low-Income Weatherization and Fuel Assistance Program Network, and the EDCs will be circulating additional information to refine the TVR billing guiding principles. Stakeholders providing follow up information agreed to provide their proposals in advance of the May 30, 2023 meeting to facilitate review and resolution of any outstanding issues prior to moving on to the next Department-identified issue.

III. Next Steps

The next AMI Stakeholder Group meeting is scheduled for May 30, 2023. The focus of this next AMI Stakeholder Group meeting will be to conclude discussions regarding TVR billing issues and begin discussions on AMI deployment strategies that may expedite the ability of competitive suppliers to offer TVR products.

Attachment A

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Attachment A

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Subject: AMI Stakeholder Group - Introductory Email and Notification of Kick-Off Meeting

Date: Friday, January 27, 2023 5:09:00 PM

Attachments: [D.P.U. 21-80-B 81-B 82-B - AMI Stakeholder Group.pdf](#)

Good afternoon. As many of you are aware, the Massachusetts Department of Public Utilities ("Department" or "DPU") directed NSTAR Electric Company d/b/a Eversource Energy ("Eversource"), Fitchburg Gas and Electric Light Company d/b/a Unitil ("Unitil") and Massachusetts Electric Company and Nantucket Electric Company each d/b/a National Grid ("National Grid")(collectively, the "Distribution Companies" or "Companies") to convene and facilitate an AMI Stakeholder Group to discuss certain issues related to implementation of the Companies' respective Advanced Metering Infrastructure ("AMI") implementation plans approved by the Department in its November 30, 2022 order in D.P.U. 21-80-B/21-81-B/21-82-B (an excerpt of the order is attached for your convenience). In its order, the Department found that, although the AMI Stakeholder Group must not delay the implementation of the Companies' AMI investments, the AMI Stakeholder Group may elicit valuable input to inform the Companies' implementation of AMI. Specifically, the Department directed the

Attachment A

AMI Stakeholder Group to focus on: (1) customer and third-party access to customer usage data; (2) customer education and engagement; (3) billing of time varying rates (“TVR”) offered by competitive suppliers; and (4) AMI deployment strategies that may expedite the ability for competitive suppliers to offer TVR products.

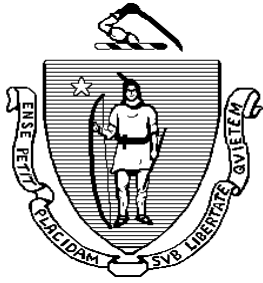
In terms of Stakeholder Group participation, the Department directed the Companies to (1) include those parties that participated in D.P.U. 21-80-B/21-81-B/21-82-B and (2) identify, solicit, and allow other interested stakeholders, such as municipal aggregators and competitive suppliers and others who did not participate in these dockets, to participate in the process. All of the entities that participated in D.P.U. 21-80-B/21-81-B/21-82-B have been included on this email and will receive all future communications regarding the AMI Stakeholder Group. Regarding category #2, Eversource, National Grid and Until have each included the competitive suppliers and municipal aggregators operating in their respective service territories. The Companies also worked with the Department of Energy Resources (“DOER”) to compile a list of other entities who did not participate in D.P.U. 21-80-B/21-81-B/21-82-B but who may, given their organization’s mission, be interested in participating in the AMI Stakeholder Group. Please let me know whether you do or do not intend to participate in the AMI Stakeholder Group. For those organizations with multiple members included in this email, please self-select one or two members to act as your organization’s spokesperson to ensure that the number of AMI Stakeholder Group members remains manageable.

The Department directed the Companies to convene the working group by February 1, 2023. The Companies have scheduled the initial kick-off meeting for 1:00 to 3:00 on Tuesday, January 31st. An invite, with a Teams video link, will follow shortly, along with an agenda. Given the timing, the initial meeting will be dedicated to introductions, logistics and other administrative issues, while the second and subsequent meetings will be dedicated to substantive discussion.

Please contact me with any questions you may have. We look forward to working together on these important issues.

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The Commonwealth of Massachusetts

DEPARTMENT OF PUBLIC UTILITIES

November 30, 2022

D.P.U. 21-80-B

Petition of NSTAR Electric Company d/b/a Eversource Energy for approval by the Department of Public Utilities of its Grid Modernization Plan for calendar years 2022 to 2025.

D.P.U. 21-81-B

Petition of Massachusetts Electric Company and Nantucket Electric Company, each d/b/a National Grid, for approval by the Department of Public Utilities of its Grid Modernization Plan for calendar years 2022 to 2025.

D.P.U. 21-82-B

Petition of Fitchburg Gas and Electric Light Company d/b/a Unitil for approval by the Department of Public Utilities of its Grid Modernization Plan for calendar years 2022 to 2025.

ORDER ON NEW TECHNOLOGIES AND ADVANCED METERING INFRASTRUCTURE PROPOSALS

APPEARANCES: Danielle C. Winter, Esq.
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FOR: NSTAR ELECTRIC COMPANY
Petitioner, D.P.U. 21-80

VI. ISSUES FOR STAKEHOLDER PROCESS

Several parties generally support convening a stakeholder working group to discuss certain issues related to implementation of the Companies' respective AMI implementation plans, including data access, TVR design, and customer education and engagement (e.g., D.P.U. 21-80, NRG Brief at 2; DOER Brief at 20; D.P.U. 21-80, Attorney General Brief at 38; D.P.U. 21-81, Attorney General Brief at 36, 37; D.P.U. 21-82, Attorney General Brief at 37-38; D.P.U. 21-80/D.P.U. 21-81, GECA Brief at 11; D.P.U. 21-80, CLC Brief at 3). However, the Companies caution that any stakeholder process must not delay implementation of the 2022-2025 Grid Modernization Plans including the AMI deployment timeline in order to ensure that the investments provide customer benefits in a timely manner (D.P.U. 21-80, NSTAR Electric Brief at 121; D.P.U. 21-81, National Grid Reply Brief at 8, 9; D.P.U. 21-82, Unitil Brief at 31). As discussed in Section III.C.2.e, above, the Department agrees that a stakeholder process must not delay the implementation of Companies' proposed investments. Nevertheless, the Department finds that a stakeholder process may elicit valuable input to inform the Companies' implementation of AMI.

There are a number of complex issues that must be addressed in order for customers and the Commonwealth to realize the benefits afforded by a full deployment of AMI. Further, providing a forum to discuss issues related to customer-facing AMI functions will help inform prudent development of AMI functionality, as well as minimize potential conflicts. The Department therefore directs the Companies to convene a statewide AMI stakeholder working group and to facilitate the statewide stakeholder process consistent with

the directives outlined herein. Further, as the state energy policy office, we anticipate that DOER will play a leading role, particularly in the development of a statewide data access strategy (see DOER Brief at 20).

The Department directs the Companies to convene the stakeholder group no later than February 1, 2023. Starting on May 15, 2023, the Companies shall submit a quarterly status report to the Department in the instant proceedings that summarizes: (1) a list of stakeholder meetings and attendees; (2) the status of any discussions with stakeholders and the process by which such discussions occurred; and (3) a summary of all issues on which the Companies and stakeholders have reached consensus. The Companies shall submit the final status report, along with final consensus proposals and a summary of areas of disagreement on August 1, 2024. Thereafter, the Department will review the final report and the Department will determine next steps.

The objective of the AMI stakeholder working group process is to provide a forum for the Companies and interested stakeholders to collaborate in a non-adjudicatory setting to discuss AMI-related issues and to develop a joint proposal for Department review that sets forth all issues on which a consensus has been reached and identifying outstanding issues, if any, that remain to be resolved.

To ensure an effective and efficient process, the Companies shall (1) designate the company personnel responsible for oversight and management of the stakeholder process, (2) recognize all entities on the service list for these proceedings as stakeholder participants

in the AMI stakeholder working group¹³⁵ and ensure each stakeholder participant receives all correspondence related to the AMI stakeholder working group and process, and (3) identify, solicit, and allow other interested stakeholders, such as municipal aggregators and competitive suppliers and others who did not participate in these dockets, to participate in the process. Additionally, to ensure an orderly and efficient process, the Companies shall be responsible for maintaining a stakeholder participant distribution list and ensuring that all company communications are circulated to that list.

As discussed more below, the stakeholder working group should focus on:

(1) customer and third-party access to customer usage data; (2) customer education and engagement; (3) billing of TVR offered by competitive suppliers; and (4) AMI deployment strategies that may expedite the ability for competitive suppliers to offer TVR products.¹³⁶

The Department has recognized that access to customer usage data is crucial for customers, third-parties, and competitive suppliers to provide the benefits of TVR. Grid Modernization Order at 128, 136-137; D.P.U.12-76-B at 34. With the deployment of AMI meters, the Companies will have customer usage data available for each hour of the billing cycle (see D.P.U. 21-80/D.P.U. 21-81/D.P.U. 21-82, Tr. 5, at 1010-1013; D.P.U. 21-80, Exh. TEC-ES-1-2). The Department directs the Companies to work with stakeholders to

¹³⁵ Any entity on the service list for these proceedings may opt-out of participating in the AMI stakeholder process.

¹³⁶ The Department will address TVR for basic service, as well as potential TVR for transmission and distribution, in a separate investigation.

identify the most effective and efficient way(s) for customers to access their hourly usage data, as well as voluntarily share the data with competitive suppliers. The Department further directs the Companies to work with stakeholders to assess the need for and value of providing aggregated hourly usage data to stakeholders, and how to efficiently provide such data in a manner that protects customer privacy (D.P.U. 21-80/D.P.U. 21-81/D.P.U. 21-82, Tr. 5, at 883-884, 971-980, 1010-1013).

For a competitive supply customer that receives a single bill from their distribution company, the Companies currently calculate the supply portion of the monthly bill based on the supply rate provided by the customer's competitive supplier for that billing cycle. With the availability of AMI usage data, a customer's supply portion of the bill could be based on numerous supply rates (D.P.U. 21-80/D.P.U. 21-81/D.P.U. 21-82, Tr. 5, at 822-826, 959-969). The Department directs the Companies to work with stakeholders to identify the most effective and efficient way(s) in which the Companies can incorporate competitive supply TVR products on the Companies' bill (D.P.U. 21-80/D.P.U. 21-81/D.P.U. 21-82, Tr. 5, at 831-838). The Companies must assess the potential costs and limitations of incorporating competitive supplier's rates on a single bill.

While the Department's approval of customer-facing investments will ensure that AMI is deployed ubiquitously throughout each company's service territory, in order to maximize the benefits of AMI, customer education must be a priority. D.P.U. 20-69, at 2, 3, citing Grid Modernization Order at 133, 136. To that end, if low- to moderate-income customers and those in EJ communities or other underserved communities are not adequately informed

and engaged with new technology and offerings available as a result of AMI implementation, or if customers are unable to obtain information due, for example, to language barriers, customer acceptance of AMI and potential dynamic pricing products could be diminished. Therefore, as part of the stakeholder process the Companies shall receive input on developing specific strategies and tactics to provide customer education and engage low- and moderate-income customers, EJ communities, and other underserved populations. In recognition of the important role that competitive suppliers, including municipal aggregations, can play in promoting price-responsive usage, the Department directs the Companies to work with stakeholders to identify effective and efficient ways in which the Companies can coordinate their customer education efforts with these entities.

Finally, the Department seeks to ensure that TVR products are available to customers in a timely manner.¹³⁷ Accordingly, the Department directs the Companies to work with stakeholders to identify AMI meter deployment strategies that may expedite and maximize the availability of TVR products to customers during the AMI deployment period (D.P.U. 21-80/D.P.U. 21-81/D.P.U. 21-82, Tr. 5, at 852-874).

¹³⁷ The Department anticipates that some competitive suppliers, including municipal aggregations, may seek to offer TVR. The Department notes that municipal aggregations will need approval of a revised municipal aggregation plan that sets forth how the aggregation intends to set its rates and demonstrate how the revised plan will provide universal access, equitable treatment of customers, and reliability. G.L. c. 164, § 134.

Attachment B

Organization	Participants	Contact Information
Eversource	Jared Lawrence, Senior VP Cust. Ops. & Digital Strategy, CCO Jennifer Schilling, VP Grid Modernization Erin Engstrom, Director, Regulatory Affairs Rich Chin, Manager, Rates Mary Quan, Rates Daryush Donyavi, Supplier Services Denise Magaldi, Supplier Services Jeanne Belliveau, Supplier Services Jessica Ralston, Regulatory Attorney Danielle Winter, Regulatory Attorney	jared.lawrence@eversource.com jennifer.schilling@eversource.com erin.engstrom@eversource.com richard.chin@eversource.com mary.quan@eversource.com daryush.donyavi@eversource.com denise.magaldi@eversource.com jeanne.belliveau@eversource.com jralston@keeganwerlin.com dwinter@keeganwerlin.com
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Unitil	Kevin Sprague, VP Engineering Patrick Taylor, Regulatory Attorney	sprague@unitil.com taylorp@unitil.com
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NRG Energy	Marc A. Hanks Director, Regulatory Affairs	Tel: (413) 642-3575 Cell: (413) 374-0099 marc.hanks@nrg.com
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Peregrine Group	Paul Gromer	pgromer@peregrinegroup.com

Attachment B

Department of Energy Resources	Anett Ludwig (Energy Policy Analyst), Spokesperson Aurora Edington, DOER Spokesperson for 4/25/23 meeting Marian Swain (Deputy Director) Colin Carroll (Legal Advisor) Aurora Edington (Grid Modernization Policy Mgr.) Lou Sahlou (Energy Efficiency Economist) Jerrylyn Huckabee (Energy Efficiency Coordinator)	Anett.Ludwig@mass.gov aurora.edington@state.ma.us Marian.Swain@mass.gov Colin.Carroll@mass.gov Aurora.Edington@mass.gov lou.sahlou@mass.gov jerrylyn.huckabee@mass.gov
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National Consumer Law Center	John Howat, Sr. Energy Analyst	jhowat@nclc.org

Attachment C

AMI Stakeholder Group

January 31, 2023 Meeting Agenda

- 1) Welcome Statement
- 2) Introductions by Member Organization Spokesperson (based on attendance list as of 1/30/23):
 - Electric Distribution Companies (EDCs) – Eversource/National Grid/Unitil
 - DOER
 - Green Energy Consumers Alliance (GECA)
 - Municipal Aggregators
 - The Energy Consortium (TEC)
 - Electric Vehicle Organizations – Tesla
 - Competitive Suppliers – Calpine/NRG/GEXA Energy/Summer Energy/Discount Power/Catalyst Power/Vista Corp/Clearview Energy/Energy Well/BP/Engie/Nordic Energy/Genie Retail/TXU/Ngande/Actual Energy
 - Other Attendees
- 3) Massachusetts Department of Public Utilities Order regarding the AMI Stakeholder Group
 - Brief overview of Grid Modernization Phase II Proceeding
 - Department Order requiring creation of the AMI Stakeholder Group
 - 4 Topics of Focus/Discussion for the Group
 - Department Directives
 - Reporting – Quarterly/Final Reports
- 4) EDC Overview of AMI Implementation Plans and Implementation Timeline
 - Eversource – Jared/Jennifer?
 - National Grid – Carlos/Lindsay?
 - Unitil – Kevin?
- 5) Prioritization of 4 Topics – TVR 1st
 - EDCs’ Rationale
 - Initial Stakeholder Group Member Reactions
 - Plan for 2nd Meeting – Substantive Discussion
- 6) Logistics/Administrative
 - Facilitator
 - Ground Rules
 - Membership – develop formal list for all AMI Stakeholder Group Communications
 - Meeting Frequency
 - Next steps/next meeting
- 7) Questions/Feedback

Attachment C

AMI Stakeholder Group

March 28, 2023 Meeting Agenda

- 1) Identification of Member Organizations
- 2) Ground Rules – DOER proposed edits
- 3) EDCs’ Proposed Statement of Scope for the 4 AMI Stakeholder Group topics
 - The DOER has requested that the EDCs define the scope and content of the 4 AMI Stakeholder Group topics so that the group has a common understanding of how to proceed.
- 4) Prioritization of the 4 AMI Stakeholder Group topics set out in the Order
 - The DOER team has indicated that: (a) they wish to better understand the EDCs’ motivation for starting with TVR billing as well as how the EDCs view the overlap between TVR billing and data access; (b) they would be also interested to hear from other stakeholders if they prefer to begin with other topics or do them concurrently; and (c) DOER sees the topic of customer engagement as important to any other step and that it needs to occur prior to the procurement of AMI technology (TVR) to ensure the technology reflects customer needs.
- 5) EDC Presentation of TVR Guiding Principles – AMI Stakeholder Group Discussion to follow presentation.
- 6) EDC Presentation of TVR Discussion Points - AMI Stakeholder Group Discussion to follow presentation.
- 7) Planning for April 25, 2023 meeting
 - Proposed agenda topics.

Attachment C

AMI Stakeholder Group

April 25, 2023 Meeting Agenda

- 1) Roll Call – 1:00 – 1:05
- 2) Discussion/Feedback on EDCs’ Guiding Principles for billing of TVR offered by competitive suppliers (slide 5 from the EDCs’ 3/28/23 presentation) 1:05 – 1:50
- 3) Discussion/Feedback on EDCs’ TVR Discussion Points (slide 6 from the EDCs’ 3/28/23 presentation) 1:50 – 2:30
- 4) Discussion/Feedback on EDCs’ Proposed Statement of Scope 2:30 – 2:50
 - Review and discuss proposed edits from L. Chretien
- 5) Planning for May 30, 2023 meeting
 - Proposed agenda topics.

Attachment D
AMI STAKEHOLDER GROUP GROUND RULES

Roles and Responsibilities: Members

- Member Organizations shall designate an organization spokesperson who shall act as the point of contact to receive all communications, meeting invites, updates, etc. regarding the AMI Stakeholder Group. Member Organizations are allowed to be a member of the AMI Stakeholder Working Group at the time when topic of their interest is on the agenda for discussion.
- Member Organization spokespeople and participants will make every attempt to attend all applicable meetings, to be on-time, and to review all documents disseminated prior to the meeting.
- If a representative or his\her alternate cannot attend a meeting, the representative should let the Facilitator know prior to the meeting (by e-mail).
- All AMI Stakeholder Group participants are charged with participating in a constructive forum where diverse points of view are voiced and examined in a professional and balanced way. Personal attacks are not permitted.
- All AMI Stakeholder Group participants agree to act in good faith in the discussions. ‘Good faith’ means that they will be forthright and communicative about the interests and preferences of their organization and will actively seek agreement wherever possible.
- It is the responsibility of the AMI Stakeholder Group spokespersons to keep their organizations informed of developments in the working group process.
- AMI Stakeholder Group participants may confer with each other in between meetings and are encouraged to do so.
- AMI Stakeholder Group participants not permitted to quote or otherwise represent other members of the working group process to the press or other outside entities (including in blogs, social media, etc.), or to speak on behalf of the AMI Stakeholder Group.
- Member Organizations will provide the AMI Stakeholder Group service list with any materials they intend to present consistent with a meeting agenda at least one week prior to the meeting at which the materials will be discussed.

Roles and Responsibilities: Facilitator

- The Facilitator’s primary function is to manage productive and well-informed meetings. The Facilitator is not authorized to provide substantive feedback, clarifications, points of agreement or disagreement on meeting discussions, etc. The Facilitator’s responsibilities are limited to administrative/ministerial duties only.
- The Facilitator will be responsible for taking meeting minutes, including recording points of agreement and disagreement. The Facilitator will maintain a master list of final consensus positions and proposals, as well as a summary of areas of disagreement.
- The Facilitator will impartially and in a non-partisan manner (not favoring any organization over another) facilitate all AMI Stakeholder Group meetings to ensure that the group is able to discuss the meeting’s agenda topics with all member organizations having sufficient time to discuss their point(s) of view, requests, concerns, clarifications, etc.

Attachment D
AMI STAKEHOLDER GROUP GROUND RULES

- The Facilitator and the Electric Distribution Companies (“EDCs” collectively and Eversource, National Grid and Unitil separately) will develop each meeting agenda to ensure that all necessary topics are discussed and, where possible, consensus is reached so that the EDCs, with the assistance of the Facilitator, may prepare both the quarterly and final AMI Stakeholder Group’s reports required by the Department of Public Utilities (“DPU”).
 - All AMI Stakeholder Group member organizations are permitted and encouraged to submit proposed agenda items no later than one week in advance of a stakeholder meeting. The Facilitator will construct agendas based on the established topic for that meeting, which should be germane to one of the four focus areas.
 - The EDCs and Facilitator will review the submissions and make a final determination as to the meeting agenda.
 - Any submitted agenda items that are not included in the next scheduled meeting agenda and are germane to one of the four focus areas will be included on a future meeting agenda to ensure that all submitted agenda items are addressed. Suggested agenda items that are not directly relevant to the four focus areas will be reviewed by the Facilitator and EDCs and added to future agendas if time permits and if they determine they will add value to the AMI scoping and design process.
- The Facilitator will prepare draft agendas and meeting summaries in a timely fashion for distribution to the AMI Stakeholder Group members. Agenda will be distributed at least three business days prior to a scheduled meeting to ensure that all member organizations have sufficient time to prepare for the meeting. Meeting summaries will be distributed within 7 business days following a meeting.
- All documents will be posted on a SharePoint site maintained by the Facilitator and the EDCs for the duration of the process, and the Facilitator will provide email notice when new documents are posted to the SharePoint.
- The Facilitator and the EDCs will take the lead in assembling the quarterly and final reports the DPU has required.
 - The Facilitator will post draft quarterly and final reports to the SharePoint site. The Facilitator will notify the AMI Stakeholder Group members that the drafts are available for review.
 - The Facilitator, with input from the EDCs, will establish the review schedules and notify AMI Stakeholder Group members via email in advance of the review periods. The review periods will be designed to provide AMI Stakeholder Group members with sufficient time for members to provide at least one round of questions, clarifications, suggestions, etc. before the report in question is filed with the DPU.
 - The Facilitator, with input from the EDCs, will establish a review protocol to ensure that all AMI Stakeholder Group members’ feedback on the reports is retained while ensuring appropriate version control. The review protocol will be posted to the SharePoint site.
 - All final filed reports will be posted on the SharePoint site.

AMI and TVR Planning

March 28, 2023

Agenda

- Proposed statement of scope for each focus area
- Proposed schedule and rationale
- TVR guiding principles
- TVR discussion points

Proposed statement of scope for each focus area

(1) Customer and third-party access to customer usage data

- Objective is to seek consensus on the following considerations, balancing potential customer value, implementation costs, ongoing storage and data management costs, and customer privacy:
 - Granularity of data to be made available
 - Format of data to be made available
 - Time periods of data to be made available
 - Customer consent requirements, including method(s) for obtaining consent
 - Protection of critical infrastructure information
 - Medium(s) for data sharing
 - Eligible data recipients
 - Target date(s) to launch data sharing

(2) Customer education and engagement

- Objective is to seek consensus on the following considerations:
 - Introductory communications when customer receives AMI meter
 - Service messages, usage insights and alerts that will be available to customers upon receiving an AMI meter
 - Medium(s) for communicating service messages, account alerts and insights
 - Strategies to avoid customer confusion during the extended AMI meter deployment timeline, when significant numbers of customers will not have yet received their AMI meters
 - Customer messaging to accompany remote order execution (e.g. communications regarding remote disconnection/reconnection when in delinquency status)

(3) Billing of TVR offered by competitive suppliers

- Objective is to seek consensus on the parameters for offering TVR to customers, with the goal of maximizing flexibility and ‘speed to market’ while minimizing costly customizations, including:
 - TVR parameters (e.g. number of daily/weekly periods) to be accommodated by EDC billing systems for “rate-ready billing”
 - “Pass-through billing” requirements for supplier rates that do not meet “rate-ready billing” parameters, including the data to be provided to the competitive suppliers and the billing determinants required from them

(4) AMI deployment strategies that may expedite the ability for competitive suppliers to offer TVR products

- Objective is to seek input from stakeholders on timelines and strategies for targeting customers and communities, while recognizing that the EDCs top priorities must be the efficiency of the deployment and achieving network stability, so that the total program is completed to the benefit of all customers as quickly as is prudent

Proposed AMI Stakeholder Group Schedule

- Guiding principles
 - Each of the 4 focus areas will be allotted approximately equal time for discussion
 - Order of topics is driven by the degree of system dependencies, resource planning implications, and required lead time, with the highest-complexity topics being discussed first to allow adequate time for EDC project teams to incorporate business requirement input from the AMI Stakeholder Group

Proposed order	Focus area	Project implications	Explanation	Timing
1	Billing of TVR offered by competitive suppliers	High	To preserve AMI timeline, CIS and MDMS replacement/modernization projects are <i>in-flight now</i> ; TVR business requirements should be determined before functional designs are locked	March-May 2023
2	AMI deployment strategies that may expedite the ability for competitive suppliers to offer TVR products	Medium	Deployment strategies may impact network design, regional timelines and the duration of the deployment, which are critical inputs into the SOWs for the AMI equipment vendor and installation sourcing strategy. Target date for completion of those SOWs is Q3 2023	June-Aug. 2023
3	Customer and third-party access to usage data	Low	Customer and permissible third-party access will be accommodated; the delivery mechanisms, format and consent requirements are not critical core system business requirements; customer engagement platform SOW tentatively targeted for late 2023, with business requirements to be defined in 2024	Sept.-Nov. 2023
4	Customer education and engagement	Low	No core system implications; customer engagement platform SOW tentatively targeted for late 2023, with business requirements to be defined in 2024	Jan.-March 2024
			Solicit input on draft final report	April-May 2024
			Submit final report	June-July 2024

Billing of TVR offered by competitive suppliers

- Guiding principles
 - TVR offers should support DPU's clean energy goals
 - Initial TVR offers should offer simplicity to customers
 - We should avoid situations where customers have a negative experience with TVR and associate it with their AMI meter.
 - Initial TVR offers should have high confidence of market appeal (i.e. prioritize rate designs that have achieved adoption in other markets)
 - EDC capabilities should accommodate flexibility for suppliers to offer innovative rates that meet market demand while avoiding need for customization
 - We should aim to minimize administrative resource requirements

Billing of TVR offered by competitive suppliers

- TVR discussion points
 - Standard parameters for TVR
 - Can we define general rate parameters for EDC billing systems to accommodate? (e.g. EDCS may accommodate standard parameter TVR rates up to ___ daily periods (suppliers may define the periods so long as they do not vary week-to-week)?
 - Variations from those standard parameters would require “pass-through billing”
 - What TVR varieties do suppliers envision offering?
 - Initial tranche of TVR
 - EDCs do not have unlimited capacity for new rate intake, entry and testing—how do we allocate limited capacity to supplier TVR offers?
 - Fixed fee per each supplier rate for set-up and QA costs incurred by EDC
 - Set lead time requirement to enable EDC to procure/assign resources to rate administration
 - Auction “slots” for first tranche of TVR offers
 - Lottery for fixed number of TVR “slots” in first tranche
 - First-in-first-out queue to be managed by EDCs based on capacity
 - Offer only “pass-through billing” for first tranche of TVR (i.e. no limit on number of rates)

Attachment F

AMI Stakeholder Group

March 28, 2023 Meeting Minutes

1) Identification of Member Organizations

- D. Winter took attendance based on stakeholder participant list.

2) Ground Rules – DOER proposed edits prior to the March 28, 2023 meeting.

- DOER edits were discussed with the group and incorporated into the ground rules.
- M. Hanks indicated that he may have additional edits following his review of the ground rules.
- D. Winter committed to circulating revised ground rules consistent with the discussion.

3) EDCs' Proposed Statement of Scope for the 4 AMI Stakeholder Group topics

- J. Lawrence ran through the EDC presentation regarding the scope of the four topics.

Data Access

- A. Ludwig asked that data access issues in other states, e.g., NH and NY, along with Green Button, be discussed. J. Lawrence and C. Nouel noted experience in other states, including best practices in NY, as well as Green Button, which is a tool to facilitate the exchange of data, would be included in future meeting agendas for the data access topic.¹
- J. Crawford – confidential customer information and CEII are often conflated, so the group will need to be clear as to the separation between the two.
- A. Ludwig requested that DOER be consulted in crafting the agenda in preparation for the data access topic, and the EDCs (J. Lawrence) agreed.

Customer Education and Outreach

- L. Chretien stated that he received comments from customers regarding receipt of information and alerts ahead of peak demand times. C. Nouel noted that, once AMI is deployed, this is an area where information will be provided to customers well before the summer months. Additionally, C. Nouel noted that all of the EDCs have demand response programs in place (both behavior- and device driven).
- A. Ludwig noted the importance of getting customer input prior to procurement and deployment, including input from low and moderate income customers, customers in Environmental Justice communities (“EJC”). Customers should have a clear

¹ Note that statements made by J. Lawrence and C. Nouel in response to questions posted during the meeting are applicable to all three EDCs, unless the minutes state differently.

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understanding of the benefits of AMI and the EDCs should be aware of the needs of customers. J. Lawrence noted that Eversource will be doing extensive customer focus groups to address these issues and C. Nouel noted that, in NY, National Grid conducted multiple customer focus groups to test messaging, communications to different communities, including EDCs, communities with a large number of elderly customers, communities with a large number of customers whose first language is other than English.

- A. Ludwig recommended that the AMI stakeholder group should hold listening sessions where the EDCs can give an overview of their AMI deployment plans and the benefits of AMI, with the majority of the listening session spent listening to customers. C. Nouel noted that it may not make sense for the EDCs to hold joint listening sessions given the differences in their service territories, including differences in demographics and building stock. C. Nouel noted that, based on National Grid's experience in NY and with its Worcester pilot, the EDCs' customer outreach and education needs to be flexible so that the EDCs can adapt to changing circumstances over time. C. Nouel provided the following example to support this: electric prices now would require different messaging than two years ago.
- M. Hanks noted that it is critical to not treat customers as homogenous and that the EDCs should tailor their outreach and education for different customer segments. C. Nouel agreed and noted that the various customer segments cannot be approached in the same way.
- J. Crawford (referencing the 2nd sub-bullet under the Customer Education and Outreach portion of the EDC presentation) stated that, since customer engagement is a two-way stream, the EDCs should also let customers know what AMI capabilities will be rolled out at a later date or not at all. J. Crawford noted that the EDCs should let customers know what the AMI testimony is capable of. J. Lawrence agreed and noted that the EDCs will have to undertake outreach and education in a controlled manner to avoid unrealistic expectations.
- D. Musselman asked about the differences between focus groups and public meetings/listening sessions. J. Lawrence stated that the EDCs undertake focus groups 1st to understand what the messaging should be and then develop their outreach and education (which could be presented at public meetings/listening sessions) based on the focus group feedback. C. Nouel noted that local outreach is very important for developing outreach and education.

Billing of TVR Offered by Competitive Suppliers

- L. Chretien noted that he is representing a non-profit that is engaged in municipal aggregation and is seeing many communities move towards municipal aggregation. Based on his experience, L. Chretien stated that, well before the EDCs deploy AMI, every customer in MA that can be aggregated will be and that there will be very few customers left on basic service. The dynamic will drive how to allocate costs to suppliers. J. Lawrence asked L. Chretien to draft a bullet to that effect to be incorporated into the scope of the discussion around billing of TVR offered by competitive suppliers.

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- J. Crawford noted that the group will need to discuss the format in which the data will be exchanged, e.g., API, EDI, etc., and the timeliness of those exchanges.
- M. Hanks noted that, for NRG, he appreciates that the discussion is focused on energy supply, but that discussion would also focus on the broader rate structure in order to advance beneficial electrification and decarbonization. D. Winter explained that the MADPU's order in D.P.U. 21-80/21-81/21-82 indicated that there would be a separate investigation to address time varying rates ("TVR") for basic service, as well as potential TVR for transmission and distribution (D.P.U. 21-80/21-81/21-82-B at 327, nt. 136) but noted that if the group did have recommendations, they could be included in the quarterly and final report to the MADPU.
- A. Ludwig noted that DOER has concerns about customers opting-out of TVR and that the EDCs should undertake early outreach to minimize opting-out. A. Ludwig asked whether data access and customer outreach and education could be discussed before TVR. C. Nouel noted that the EDCs need to finalize any requirements necessary to implement the billing of TVR for competitive suppliers and AMI deployment strategies that may expedite the ability for competitive suppliers to offer TVR products as early as possible in the stakeholder process. J. Lawrence noted that the EDCs need to understand suppliers requests and requirements in order to establish parameters that are as accommodating as possible.
- D. Musselman noted that he supports L. Chretien's statements regarding municipal aggregation and that he is very interested in time of use ("TOU") rates and ensuring that the EDCs can accommodate this. Regarding distribution rates, D. Musselman noted that the stakeholder group should keep in mind that the group does not do anything in this process to hurt distribution rates. D. Musselman noted that there is a needs to minimize the amount of investment in the distribution system (J. Crawford agreed).

AMI deployment strategies that may expedite the ability for competitive suppliers to offer TVR products

- A. Ludwig asked how the EDCs will expedite the ability of suppliers to bring their products to market. J. Lawrence noted that this is discussed later in the EDC presentation.

4) Prioritization of the 4 AMI Stakeholder Group topics set out in the Order

- J. Lawrence presented slide on the proposed AMI stakeholder group schedule.
- M. Swain asked for help in clarifying the EDCs' business needs and how that impacted the schedule, including whether data access needs to inform the type of CIS/MDMS. J. Lawrence and C. Nouel noted that data access is not needed to determine the core system requirements for AMI and that the applications to extract data are widely available or, alternatively, could be developed in-house and bolted onto the core systems.

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- A. Ludwig asked if there will be cross-over discussions. C. Nouel stated that there will be cross-over where there are relevant topics on the agenda, but cautioned against going off on tangents.
- D. Boecke – noted that he deferred to the EDCs and asked whether they have looked at other states’ best practices regarding bolt-on solutions. C. Nouel noted that bolt-on solutions have been deployed in NY and stated that the issues regarding data are less focused around the technical aspects of accessing the data. C. Nouel noted that for billing, the EDCs need to code in the billing requirements, which requires lead time.
- L. Sahlu asked, in terms of CIS and MDMS, whether the EDCs were opposed to deploying future looking technologies as opposed to technologies focused on current business requirements. J. Lawrence and C. Nouel noted that the EDCs are planning on deploying AMI in an agile manner that allows them to fulfill both Day 1 and future needs and are utilizing flexible platforms where they will be able to accommodate future needs.
- A. Ludwig asked how meetings would be run going forward and recommended that the EDCs follow the process used by the energy storage interconnection group. J. Lawrence agreed to review their process.
- J. Crawford – noted that technology changes so fast and that the EDCs will need to understand actual use cases of what suppliers can do for customers, resiliency, etc. J. Lawrence and C. Nouel noted that this is why it is so important for the EDCs to facilitate interaction with customers.
- M. Swain asked, in regard to customer engagement, whether there was anything that the EDCs could hear from customers now that would be used to inform their procurement of AMI systems. C. Nouel noted that National Grid relied on customer input in procuring its MDMS and J. Lawrence noted that Eversource has done the same.
- M. Swain asked whether the EDCs have procured their CIS. J. Lawrence noted that procurement is underway for Eversource, including the core meter to cache system, billing, payments, credit and collections and that Eversource is laying the foundation with MDMS for base billing.
- J. Lawrence asked if the group was OK with the prioritization of the 4 discussion categories and the schedule. No response from other meeting participants.

5) EDC Presentation of TVR Guiding Principles

- C. Nouel ran through the TVR Guiding Principles slide in the EDCs’ presentation.
- J. Howat noted that he appreciated the presentation, but that it was missing discussion of consumer protections for low income customers, which must play a key role. J. Howat noted that some jurisdictions have looked at offering shadow billing to low income customers, which is a hold harmless construct that protects them from spiky billing. J. Howat noted that the group is focusing on competitive supply while some customers have not benefited from competitive supply, which will be exacerbated by TVR. J. Lawrence agreed that consumer protections are paramount.

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- J. Crawford cautioned against protecting customers from themselves and noted that mass market customers are willing to do anything to save money and reduce carbon emissions but don't actually want to have to do anything to accomplish this. J. Crawford noted that we want customers to alter their consumption and, if they can't adjust their consumption, they should not be on TVR. J. Crawford noted that customers need to be well informed about TVR. J. Crawford stated that, if there is too heavy a focus on meeting the Commonwealth's goals and ensuring customer protections, we may not be able to innovate.

6) EDC Presentation of TVR Discussion Points

- J. Lawrence ran through the TVR Discussion Points slide in the EDCs' presentation. D. Winter noted that stakeholder group feedback should be the focus of the next meeting.
- L. Chretien noted that, at the time of the EDC AMI roll-out, we will have municipal aggregation and the EDCs should plan for this. L. Chretien noted that the DPU will weigh in on municipal aggregation. L. Chretien stated that the EDCs should push for an opt-out approach to TVR. L. Chretien asked what the early adopters of TVR should be charged compared to late adopters. L. Chretien asked if it would be helpful to the EDCs if a number of municipal aggregations indicated that they wanted to start the same rate on a certain date (would this be easier or cheaper for the EDCs to implement?). C. Nouel and J. Lawrence noted that it would be easier and cheaper but that there were a lot of perspectives from stakeholder group members that need to be heard.
- J. Crawford noted that the EDCs need to consider the differences between their different customers classes and distinguish between them (and what is appropriate for each class) for their AMI roll-out. J. Crawford stated that if a certain roll-out model works for one class, can it translate without changes to other rate classes.

7) Planning for April 25, 2023 meeting

- Based on discussion at the March 28, 2023 meeting, the April 25th meeting will focus on stakeholder group members' feedback, questions, etc. on the EDCs' TVR Guiding Principles and Discussion Points (slides 5 and 6 of March 28th EDC presentation).