

## CITY OF WALTHAM

### MUNICIPAL AGGREGATION PLAN

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## I. INTRODUCTION

This is the municipal aggregation Plan for the Waltham Community Electricity Program. The Department approved the City's municipal aggregation plan in 2020 and the City launched its Program in May 2021. The City has revised its Plan, consistent with the municipal aggregation statute, G.L. c. 164, § 134(a) and Department Guidelines. Through the Program, the City will continue to provide electric supply options to Waltham residents and businesses. Eversource, the City's Electric Distribution Company, will remain responsible for the distribution of electricity, maintaining electric infrastructure and responding to power outages.

The Program allows the City to decide the features of electric supply options, known as Products. It will continue to be available to all residents and businesses, offering a Default Product and optional Products. Upon launch in 2021, all Auto-Enroll Customers were automatically enrolled in the Default Product unless they opted out or selected an optional Product. While the Program is active, Participants can switch to an optional Product or opt out to choose another Competitive Supplier or Basic Service from the Electric Distribution Company. Those not initially participating can join the Program at any time.

The Program will continue to provide electric supply options that match the diverse needs and preferences of our community, which include:

- Negotiating the best terms and conditions for electric supply: It is important to note that the Program cannot guarantee prices will be lower than the Eversource Basic Service rates at all times, because Basic Service rates change frequently and future prices are unknown.
- Using and supporting the growth of renewable electricity.
- Supporting electrification, particularly for heating and transportation currently powered by fossil fuels.

## II. DEFINITIONS

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

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

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

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

**Consultant** – means the entity retained by the Municipality to assist with the development and operation of the Plan and Program.

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

**DOER Best Practices** – means the *DOER Recommended Best Practices for Advancing Clean Energy in Municipal Aggregation Plans*, as may be amended from time to time.

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

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

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

**Electric Distribution Company or EDC** – means Eversource, the company that provides electric distribution service within the Municipality.

**Electric Supply Agreement or ESA** – means the contract between the Municipality and a Program Supplier concerning electricity supply for the Program.

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

**Environmental Justice Population**<sup>1</sup> – in Massachusetts, an environmental justice population is a neighborhood that meets one or more of the following criteria:

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

**Guidelines** – means the Department-approved Municipal Aggregation Guidelines in D.P.U. 23-67, as may be amended from time to time.

**Municipality or City** means the City of Waltham.

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<sup>1</sup> See Environmental Justice Policy of the Executive Office of Energy and Environmental Affairs (Updated June 24, 2021) available at <https://www.mass.gov/doc/environmental-justice-policy6242021-update/download>.

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

**Opt-Out Notice** – means the document sent to Auto-Enroll Customers to inform them of their right to opt out of such enrollment (see Section IV.B.6.a, below).

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

**Plan** – means this municipal aggregation plan.

**Product** – means an electric supply product available to Participants in the Program.

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

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

### III. PROCEDURAL REQUIREMENTS

#### III.A. INITIATION OF PROCESS

Waltham obtained the authorization by a majority vote of its City Council to initiate a process to develop a municipal aggregation plan on April 23, 2018.

#### III.B. CONSULTATION WITH DOER

The City consulted with DOER in developing its Plan, pursuant to G.L. c. 164, § 134(a), in a meeting on May 23, 2019, which included its Consultant, Good Energy.

#### III.C. PUBLIC REVIEW

The City made its original Plan available for public review from March 4, 2019 through March 25, 2019, at the City Hall and on its website.

The Department approved the Plan on November 24, 2020, and the Program launched in May 2021.

The City revised the Plan and has made it available for public review from December 30, 2024 through January 31, 2025 at the City Hall and on its website.

### IV. PLAN ELEMENTS

#### IV.A. ORGANIZATIONAL STRUCTURE OF THE PROGRAM

Table IV.A identifies the entity or entities (Municipality, Consultant, Program Supplier) that will perform core functions of the Program.

*Table IV.A – Organizational Structure*

Core Functions	Performing Entity			Plan section in which tasks are described
	Municipality	Consultant	Supplier	
<b>Liaisons/Representatives/Agents</b>				
Municipal Representative/Agent before Department		X		<i>Section V</i>
Liaison with DOER		X		<i>Section III.B</i>
Liaison with Electric Distribution Companies		X		<i>Section VIII</i>
<b>Plan Elements</b>				
Procurement of Supply		X		<i>Section IV.B.2</i>
Product Determination	X			<i>Section IV.B.3</i>
Other Funding/Costs	X			<i>Section IV.B.4</i>
Customer Enrollment			X	<i>Section IV.B.5</i>
Customer Notifications/Outreach/Education	X	X		<i>Section IV.B.6</i>
Ongoing Program Information		X		<i>Section IV.B.7</i>
Program Termination	X			<i>Section IV.B.8</i>
Annual Reports		X		<i>Section VI</i>
<b>Customer Service</b>		X	X	<i>Section IV.A</i>

**Customer Service information:**

- The City encourages customers to visit the Program website, [Waltham-CEA.com](http://Waltham-CEA.com), to use the online contact forms and to view the latest customer support information and resources.
- Municipality: Frank Nakashian, Planning Director, at [fnakashian@city.waltham.ma.us](mailto:fnakashian@city.waltham.ma.us) and 781-314-3382.
- Consultant: Good Energy at support\_ma@goodenergy.com and (339) 204-6820.
- Program Supplier: For the current ESA, the Program Supplier is Dynegy and can be reached at DESCustCare@Dynergy.com and (866) 220-5696. For future ESAs, supplier contact information will be determined based upon completion of bidding.

IV.B. PROGRAM OPERATION

IV.B.1. Statutory Requirements

Pursuant to G.L. c. 164, § 134(a), a Plan shall provide for:

IV.B.1.a. Universal Access

All customers residing or located within the municipal boundary are eligible to participate in the Program, either through an automatic enrollment process or upon request of the customer to join the Program (see Section IV.B.5, below).

IV.B.1.b. Reliability

Waltham has retained the services of Good Energy, a Department-approved Electricity Broker that is licensed to provide municipal aggregation consulting services. Waltham offers this as demonstration that it has the technical expertise necessary to operate and manage the Program.

IV.B.1.c. Equitable Treatment of All Customer Classes

Table IV.B.1.c identifies the Plan elements for which the treatment between customer classes (or subclasses) may vary. For each Plan element identified, the Plan explains (in the applicable section below) why the varied treatment is reasonable and appropriate in consideration of the disparate characteristics of each customer class or subclass.

*Table IV.B.1.c Equitable Treatment of Customer Classes*

Plan Element					
	Product Rate Setting/Renewable Energy Content (§ IV.B.3)	Other Funding Sources/Costs (§ IV.B.4)	Customer Enrollment (§ IV.B.5)	Customer Notification (§ IV.B.6)	Ongoing Program Information (§ IV.B.7)
Procurement of Supply (§ IV.B.2)	Yes	-	-	-	-

IV.B.2. Procurement of Supply

Table IV.B.2 identifies: (1) the actions Waltham expects to take to procure supply for the Program in the future; and (2) the expected timeline for each action, identified as the number of days after Day 0, the day the City has determined to proceed with a bid.

*Table IV.B.2 - Procurement of Supply<sup>2</sup>*

<b>Procurement Steps</b>	<b>Expected Timeline</b>
Issue Request for Proposals	15
Negotiate ESA	15 through 44
Evaluate Bids & Execute ESA	45

The Consultant will manage the procurement of supply, and all final procurement decisions will be made by the City. Whether the City conducts an individual solicitation or participates in a solicitation with a buying group, at the conclusion of the bidding process it will select a Competitive Supplier offer appropriate for its residents and businesses. Participation in a buying group shall not require the City to select the same price, terms or Competitive Supplier as other members of the buying group. If none of the bids are satisfactory, the City will reject all bids and repeat the solicitation for bids as often as needed until market conditions yield an offer that is acceptable.

IV.B.3. Product Information

Table IV.B.3 identifies, for each Product, (1) the components of the rates that will be charged to Participants, and (2) the renewable energy content, including the types of renewable energy resources that comprise the voluntary component. All funds collected through rates will be used specifically for the benefit of the Program.

The Table and discussion below describe the City’s Products in the current ESA and its expected approach to its Products and its process to make final determinations for future ESAs. The Plan addresses how Waltham will update this table in Section IV.B.7 (Ongoing Program Information), below.

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<sup>2</sup> As Waltham has already launched its program, the City does not need to notify the EDCs of Department approval nor file any updates on procurement timelines in the docketed proceeding with the Department.

*Table IV.B.3 - Product Information*

	<b>Standard (Default)</b>	<b>Basic (Optional)</b>	<b>Plus (Optional)</b>
<b>Rate Components (in \$/kWh)</b>			
Supply and Renewable Energy Content	\$0.15246	\$0.14850	\$0.16355
Consultant Services	\$0.001	\$0.001	\$0.001
Municipality Services	0	0	0
Other Services	0	0	0
TOTAL	\$0.15346	\$0.14950	\$0.16455
<b>Renewable Energy Content (in % of total)</b>			
Required (2024)	62%	62%	62%
Voluntary RPS Class I	10%	0%	38%
TOTAL	72%	62%	100%
<b>Supplier Name</b>	Dynergy	Dynergy	Dynergy
<b>Effective Dates</b>	December 2023 through December 2025 meter reads	December 2023 through December 2025 meter reads	December 2023 through December 2025 meter reads

**Number of Products:** The Program currently offers a Default Product and two Opt-In Products.

**Rate Components - Uses and Values:**

- *Supply and renewable energy component:* This component comprises the cost of all-requirements power supply, all renewable energy required by the Commonwealth, and any additional renewable energy added by the City. The value of this component is determined by the unit pricing provided by bidding suppliers and the quantity of additional renewable energy the City desires in each Product. In the current ESA, the City selected the Standard Product to include some voluntary renewable energy, though less than the Plus Product; the Plus Product was chosen to incorporate enough voluntary renewable energy to always total 100% renewable content; and the Basic Product was designed to meet the Massachusetts renewable energy requirements and be the least cost product in the Program.
- *Consultant services component:* This component is the cost of Consultant services to administer the Program, whose responsibilities include: representing the City before the Department, including securing regulatory approvals and maintaining compliance with legal and regulatory requirements; strategizing for and managing the procurement of electric supply; developing and implementing the public education plan; interacting with the Electric Distribution Company; monitoring the ESA; preparing reports to the City developing and maintaining a comprehensive, branded Program website;

providing Program customer support by telephone and email, including addressing customer complaints; receiving customer requests to enroll, change program options, or opt-out; forwarding those requests to the Program Supplier and monitoring implementation; overseeing periodic automatic enrollment mailings to new customers; monitoring Program Supplier performance; monitoring electricity market and regulatory developments; and producing regulatory reports and managing supplemental filings with the Department (e.g., Plan amendments). The value of this component in the current ESA is \$0.001 per kilowatt hour for all Products.

- *Municipality services or other services components:* The City does not include additional components in the current ESA.

**DOER Best Practices:** The City is aware of the DOER Best Practices. The City intends this Program to provide economic and environmental benefits to the community, as well as accelerate the State's progress toward its clean energy goals. The City utilizes DOER's Best Practice #3, the purchase of additional Massachusetts Class I RECs (i.e. New England-based renewable energy) in both the Default Product and optional Plus Product, in its current ESA. This approach supports the Commonwealth's emissions reduction goals and enables the City to provide residents an option for cleaner power to the majority of its Participants and to contribute to the growth of clean energy in the New England region at scale. The City expects to explore the opportunity to use rate components to finance new, local clean energy facilities (DOER's Best Practice #1), and, if pursued, is most likely to integrate such a solution in a subsequent ESA. The Municipality will assess the need for and benefits of using a rate component to fund some or part of municipal staff time (DOER's Best Practice #2) but is not doing so during the current ESA.

**Differences in Rate Setting:** The Program may distinguish among customer rate classes by soliciting separate Program pricing for each of those classes. Such varied treatment is appropriate given differences in load profile and individual customer usage and demand, such that pricing will be based on the cost to serve each customer class.

The Program may distinguish among the following Participants:

- Medium, large and very large business customers that join after the start of an ESA may receive pricing based on then-current market prices at the time the customer joins the Program. This treatment is reasonable as these customers represent a greater quantity risk to the Program Supplier than other new customers, and therefore they would impose greater costs on the Program, and the costs to serve them at that time may be different.
- Customers re-joining the Program after having previously opted out may be offered market-based pricing. This treatment is reasonable because after leaving the Program, the Program Supplier would not expect to serve that customer's load, and the costs to serve them upon return may be different.
- To the extent authorized by the Department pursuant to D.P.U. 20-145-D and the Guidelines, the City may pursue Low Income Community Shared Solar established in

the Solar Massachusetts Renewable Target (SMART) regulations (225 CMR 20.00) to provide discounts to the low-income sub-class of residential customers meeting the regulatory requirements. The treatment is reasonable as Community Shared Solar SMART incentives and requirements are unique for the low-income sub-class of residential customers.

The ESA will establish how the Program will distinguish pricing, and such distinctions will be reflected in the Ongoing Program Information that “Municipality» will make available (see Section IV.B.7.b).

**Decision Making:** The City will finalize the number of Products, the level of renewable energy in each Product, and the values for all rate components and term length for each ESA after conducting a procurement for electric supply and receiving price bids. The City will make its decisions by assessing the competitiveness of the final prices, the potential environmental benefits and incremental value the City could create for Program Participants.

**Other Energy-Related Products & Services:** In addition to the Default and Opt-In Products described above, the City has the discretion to offer other energy-related products or services. At this time, the City has not identified any such products or services to offer; however, the City will consider proposals by prospective competitive suppliers during bidding, as well as by its Program Supplier, while the Program is active. The City will make a decision whether to offer such additional energy-related products and services if the City determines that doing so would provide incremental value to Program Participants.

#### IV.B.4. Other Funding Sources/Other Costs to Participants

Waltham has not identified other funding sources. Participants will incur no additional costs beyond Product rates.

#### IV.B.5. Customer Enrollment

##### IV.B.5.a. Initial Enrollment

For its initial enrollment at launch, Waltham conducted the following process, which it will also use for ongoing enrollment of new Auto-Enroll customers. Prior to enrollment, Waltham sent an Opt-Out Notice to Auto-Enroll Customers, informing them that they will be automatically enrolled in the Program unless they take the action(s) specified in the Opt-Out Notice. Waltham will provide customers with at least 30 calendar days (plus six days to account for delivery) to opt out of the Program. After that time, Waltham enroll all Auto-Enroll Customers that did not opt out, in accordance with the requirements of the Electric Distribution Company. Auto-Enroll Customers that do not opt out will be enrolled in the Default Product, unless they notify Waltham that they seek to receive an Opt-In Product.

#### IV.B.5.b. Ongoing Enrollment

On a periodic basis, Waltham will obtain from Eversource lists of new Auto-Enroll customers that have opened accounts within the municipality, and Waltham automatically enroll such new Auto-Enroll Customers, subject to the opt-out provisions for initial enrollments described above.

Any Electric Customer in the Municipality may voluntarily enroll in (i.e., opt-in to) the Program by any of the following methods: 1) calling the Program's toll-free number; 2) submitting a form on the Program website; or 3) calling the Program Supplier's toll-free number. Certain customers may receive market pricing, as described above in Section IV.B.3. Rate Setting.

#### IV.B.5.c. Opt-In Product Enrollment

Any electric customer in the Municipality may voluntarily enroll in (i.e., opt-in to) any Opt-In Product as described in Section IV.B.5.b.

Waltham will notify Participants enrolled in an Opt-In Product prior to any change in the Product's rates and/or renewable energy content. At the commencement of the new price/renewable energy content, Participants will continue to receive their current Product, subject to the new applicable price and renewable energy content, unless the Participant informs the Municipality otherwise.

A Participant enrolled in an Opt-In Product that is being discontinued must affirmatively select another Product. If the Participant does not make such a selection, the Participant will be enrolled in the Default Product.

#### IV.B.6. Customer Notifications

##### IV.B.6.a. Opt-Out Notice

Waltham will deliver an Opt-Out Notice to all Auto-Enroll Customers at least 36 calendar days prior to enrollment. The Opt-Out Notice will inform customers (1) that they are to be automatically enrolled in the Program, (2) that they have the right to opt out of the Program without penalty, and (3) of the actions they must take to opt out. The Notice will include Product information related to price, term, and renewable energy content, and will identify the actions that a customer must take to select an Opt-In Product. Finally, the Notice will include information on Basic Service rates, including how to access it, and the fact that it is available to them without penalty. Attachment 1 includes a representative form of Waltham's Opt-Out Notice.

The City will address residents with limited English proficiency by including a language access document with the Opt-Out Notice. The language access document will contain a message in

26 languages encouraging Auto-Enroll Customers to have the notification translated and providing the Program website address and toll-free number. The City will provide machine translation of the Program website.

Waltham will (1) send the Opt-Out Notices in a clearly marked municipal envelope that identifies it contains important information regarding participation, and (2) include a self-addressed, postage-paid envelope for the opt-out reply card.

#### IV.B.6.b. Notification of Product Change

Waltham will notify Participants of changes in price or renewable energy content of any of its Products. The notification will identify both the Product's existing and new price and renewable energy content and will identify the actions Participants must take if they no longer seek to purchase the existing Product.

#### IV.B.6.c. Other Notifications

##### IV.B.6.c.i. General Program Information

Waltham may deliver information and educational materials regarding its Program to each Electric Customer within its boundary, including Participants and non-Participants. Waltham may request, no more than quarterly, that Eversource provide the information (customer name, mailing address (and service address, if different), and rate class) necessary to facilitate such notifications. Waltham will not share this information with Program Suppliers. In the event that Waltham sends notices or educational materials to customers enrolled to receive service from a Competitive Supplier, such notification or educational materials will inform those customers that, if they enroll in the Program, they may incur an early cancellation fee from their Competitive Supplier, and that they should check with their Competitive Supplier on this matter before enrolling in the Program.

##### IV.B.6.c.ii. Program Supplier Communications

Upon approval from the City, an active Program Supplier may communicate with Participants regarding the Program and, if applicable, energy-related products or services.

#### IV.B.7. Ongoing Program Information

Waltham specifies that it will provide the public with access to the ongoing Program information listed in sections a through c, below. Waltham will make this information available to the public through a prominent link on the City's website. Table IV.B.7 identifies the methods by which Waltham will communicate to the public how they can access this information.

*Table IV.B.7 - Public Access to Ongoing Program Information*

Location	Description
Municipal website	Program announcements displayed in a prominent location, consistent with other municipal updates. Machine translation is available on the website. Detailed Program information available through a prominently displayed link to the Program website.
Program website	Will include current rates and all information listed in section 7.a through c below. Copies of the Opt-Out Notices and notifications of Product change will be posted on the website. Presentation materials and recordings of public meetings will be posted on the website. Machine translation available on the website, <a href="http://Waltham-CEA.com">Waltham-CEA.com</a> .
Social media accounts	Posts on official City social media account, such as The City of Waltham on Facebook, Instagram and Twitter
Municipal cable access TV	Announcements sent to WCAC-TV <a href="https://www.wcac.org/">https://www.wcac.org/</a> .
Announcement to local/regional media	Announcements sent for publication in the local media, including Waltham Times <a href="https://walthamtimes.org/">https://walthamtimes.org/</a> .
Physical posting in municipal buildings	Flyers and announcements will be posted in City Hall, Waltham Public Library and Waltham Council on Aging.
Municipal departments, boards, and committees	Updates presented to the City Council as part of regular meetings, which can be attended in-person or remotely via virtual meeting platform.

*Table IV.B.7 (Continued) - Public Access to Ongoing Program Information*

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Community organizations	<p>Updates sent to local groups with requests that they publicize it to their constituents:</p> <ul style="list-style-type: none"><li>○ Community Teamwork, Inc. (<a href="http://www.commteam.org/">http://www.commteam.org/</a>) is a community action agency that collaborates with members of the Greater Lowell Community to work with low-income households on programs related to energy assistance and related issues.</li><li>○ Waltham Chamber of Commerce (<a href="https://www.walthamchamber.com/">https://www.walthamchamber.com/</a>) is chosen to help connect with non-residential electricity users.</li><li>○ Waltham Housing Authority (<a href="https://walhouse.org/">https://walhouse.org/</a>) provides low-income families, seniors, and people with disabilities the opportunity to live in safe, decent, affordable and accessible housing.</li><li>○ Healthy Waltham-Food Pantry (<a href="https://healthywaltham.org/food-pantries/">https://healthywaltham.org/food-pantries/</a>) provides services to individuals and households in Waltham that are experiencing food insecurity and is chosen to help connect the program with that demographic.</li><li>○ Waltham Lions Club (<a href="https://walthamlions.org/">https://walthamlions.org/</a>) is chosen to help connect the Program with those interested in the environmental benefits of the electricity supply options.</li><li>○ Waltham Council on Aging (<a href="https://www.city.waltham.ma.us/council-on-aging">https://www.city.waltham.ma.us/council-on-aging</a>) is the City's organization to support senior citizens in the community and is chosen to help the Program connect with that demographic.</li><li>○ Religious institutions, such as the Saint Mary Parish (<a href="https://www.stmarywaltham.org/">https://www.stmarywaltham.org/</a>)</li></ul>
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In the table above:

- The City has a significant population of residents with limited English proficiency, and commonly speak Spanish, Portuguese, and Haitian Creole and they will be able to access the entire Program website through embedded machine translation. Translated copies of the Opt-Out Notice and product change notifications, as well as translation services for public meetings, will be provided upon request. The Program Supplier's customer support will also offer translation services.

- Waltham has Environmental Justice zones identified based on income, minority population and language isolation. The City will engage with local organizations that support economically disadvantaged individuals (e.g. religious groups, Community Teamwork, Inc., and the Waltham Housing Authority) to help connect with these communities. Those who require audial assistance will have access to digital copies of presentations and all announcements will be written, either electronically or in-print. Customer support will be available via email as well.
- Those who require visual assistance will have access to live-streamed meetings as well recordings of those meetings for future access. Screen reader technology will be able to read announcements posted via social media, local media, and on the Program website. Customer support will be available via phone.
- The City seeks to reach those who may not routinely access the Municipality's website or are otherwise hard to reach by utilizing a diversity of outreach approaches, including existing governmental and non-governmental communication channels (e.g., City Council meetings and diversity of local community groups), local media, social media, and physical postings. Additionally, meetings will be held in City run accessible spaces for those with mobility issues and/or live-streamed for remote access.

#### IV.B.7.a. Updated Product Information

Waltham will update Product rates and renewable energy content as necessary, in the format shown in Table IV.B.3.

#### IV.B.7.b. Annual Program Information for the Previous Year

Waltham will provide Program information annually for the previous year as required by the Guidelines.

- IV.B.7.b.i. Product information - rate components, renewable energy content, and participation
- IV.B.7.b.ii. Product rate component information
- IV.B.7.b.iii. Renewable energy content information
- IV.B.7.b.iv. Organizational structure, as set forth in Table IV.A
- IV.B.7.b.v. Equitable treatment of customer classes, as set forth in Table IV.B.1.c
- IV.B.7.b.vi. Supply procurement activities, as set forth in Table IV.B.2
- IV.B.7.b.vii. Representatives of all notifications sent during the previous year

- IV.B.7.b.viii. Methods of Public Access, as set forth in Table IV.B.7.c.iii
- IV.B.7.b.ix. Other funding source/costs to Participants, if applicable

#### IV.B.7.c. General Program Information

Waltham will provide and maintain access to Program-related documents (e.g., Plan, Department Order, Program press releases).

#### IV.B.8. Termination of the Program

Waltham will take all reasonable actions to ensure a continuous supply of electricity to Participants. Although the City is not contemplating a termination date, the Program could be terminated upon the termination or expiration of the ESA without any extension or negotiation of a subsequent supply contract, or upon the decision of the City to dissolve the Program effective on the end date of the existing ESA.

To minimize the chance of termination, at least 90 days prior to the end of the term of the initial ESA, the City will solicit bids for a new supply agreement to continue the Program with the same or new Competitive Supplier.

In the event of Program termination:

- At least ninety (90) days prior to the termination: the City will notify the Electric Distribution Company and Department
- At least thirty (30) days prior to the termination:
  - The City will notify Program Participants through postings on the Program and City websites, media releases, social media, and a physical posting in City buildings.
  - The City will notify the service list for the docket in which the Department approved the Municipality's Plan.
- It will be the responsibility and requirement of the Competitive Supplier to return the customers to Basic Service of the Electric Distribution Company in accordance with the then applicable Electronic Data Interchange rules and procedures.

In the event of Program termination, Waltham will not file a new Plan for Department approval for a minimum of two years from the date of termination, defined as the date by which Waltham has returned all Participants to Basic Service. The new Plan will fully describe the circumstances that led to the termination, and the steps Waltham has taken to protect against a second termination.

#### IV.B.9. Rights and Responsibilities of Program Participants

Participants will be able to: (1) select any of the Products offered to the applicable customer class or subclass; (2) switch from one Product to another by contacting the Consultant or the Program Supplier; and (3) leave the Program at any time without penalty by contacting the Consultant, the Program Supplier or Electric Distribution Company.

#### V. DEPARTMENT REVIEW

Waltham will submit this revised Plan to the Department for informational purposes, consistent with the Guidelines, and Section IX below.

Waltham's representative before the Department is its Consultant, Good Energy. The Department should include Frank Nakashian, Planning Director, at [fnakashian@city.waltham.ma.us](mailto:fnakashian@city.waltham.ma.us) and 781-314-3382, on all correspondences with the City's Consultant.

#### VI. ANNUAL REPORTS

Waltham will submit the following information annually to the Department related to Program operations during the previous year:

- An Excel spreadsheet in the format shown in the Guidelines, Attachment VI;
- A document that includes the information requirements set forth in Section IV.B.7.b, above.

#### VII. {RESERVED}

#### VIII. NOTIFICATIONS TO ELECTRIC DISTRIBUTION COMPANIES

##### VIII.A. PLAN FILING

Waltham, via its Consultant, will notify the Electric Distribution Company upon filing the revised Plan with the Department.

##### VIII.B. ELECTRIC SUPPLY AGREEMENT

Waltham, via its Consultant, will (1) notify Eversource, in a timely manner, when it has executed an agreement with a Program Supplier, and (2) provide the Electric Distribution Company with the information necessary to enroll customers with the Program Supplier. The City, via its Consultant, shall file the notification in its docketed proceeding at the Department. Customer enrollment will begin no sooner than 60 days from when Waltham provides the necessary information to Eversource.

**IX. PLAN AND PROGRAM CHANGES**

**IX.A. PLAN MODIFICATIONS**

In the event that Waltham seeks to modify its Plan in a manner consistent with the Guidelines, it will allow at least 30 calendar days for public review of the revised Plan. Following public review, Waltham will submit the revised Plan to the Department for informational purposes. Waltham may seek consultation with the Department to determine if a proposed modification is consistent with the Guidelines.

**IX.B. PROGRAM CONSULTANT**

In the event that Waltham hires a new Consultant, it will notify the Department in writing, identifying the new Consultant and including, if applicable, documentation that the Consultant is an Electricity Broker licensed to provide municipal aggregation consulting services (see Section IV.B.1.b, above).

**ATTACHMENT 1 – REPRESENTATIVE OPT-OUT NOTICE**

See next page



# City of Waltham

WALTHAM COMMUNITY ELECTRICITY

Month, Day Year

The City of Waltham is pleased to introduce you to our electricity supply program, Waltham Community Electricity. The program is designed to help our community members manage electricity costs and increase renewable energy use. Your participation in Waltham’s program is voluntary, and this letter explains your options.

Your Eversource account is scheduled for automatic enrollment in the “Waltham Standard” product starting Month Year.

You may opt out and not participate. You may also choose any of the other options offered by Waltham.

If you participate, you can leave the program at any time in the future, without penalty.

**The deadline to opt out is MONTH DAY, YEAR.**

## WHAT IS WALTHAM COMMUNITY ELECTRICITY?

Waltham Community Electricity is a group purchasing program, managed by the City, to provide electricity supply options to residents and businesses in Waltham. Your electric bill from Eversource has two sections: Supply (the source of electricity) and Delivery (getting the electricity to you). As your utility, Eversource will always manage Delivery. If you participate in the program:

- **What changes?** Participation will only change the name of the supplier and the cost for supply, shown in the Supply section of your electric bill from Eversource.
- **What stays the same?** Everything else stays the same. Delivery costs from Eversource do not change. Eversource will continue to manage all electricity billing, and all existing payment arrangements remain in effect, such as budget or balanced billing and low-income rate class discounts. Any solar net metering credits or other solar benefits remain the same, too. Eversource will continue to respond to power outages and maintain poles, wires and your meter.

Waltham Community Electricity is a municipal aggregation program, and over 170 other cities and towns operate similar programs. State law structures the program as automatic enrollment and requires that customers have the opportunity to opt out before the program starts. You can opt out of the program now or at any time in the future, without penalty.

## ELECTRICITY SUPPLY PRODUCTS

All supply products from Waltham Community Electricity offer a stable price, fixed for 24 months, from December 2023 to December 2025. While Waltham can never guarantee savings, our automatic enrollment product is designed to be cost-competitive while also providing you additional renewable energy. There are also options for those looking for the lowest cost or the most renewable energy.

Waltham Basic (Option)	Waltham Standard (Auto-enroll)	Waltham Plus (Option)
14.950 ¢/kWh	15.346 ¢/kWh	16.455 ¢/kWh
Meets State minimum renewable energy standards	Adds 10% voluntary renewable energy (MA Class I RECs)	Adds renewable energy from Class I sources to total 100%

If you participate, you will see City of Waltham WCE (Dynergy) as the supplier and the Waltham price on your Eversource bill. The Waltham price will take effect as of your MONTH YEAR meter read.

## YOUR NEXT STEPS

- There is no action necessary to receive the “Waltham Standard” product.
- To choose another Waltham product, call our Program’s electricity supplier, Dynergy at (866) 220-5696, or submit a request at [Waltham-CEA.com](http://Waltham-CEA.com).
- To receive Eversource Basic Service for your electricity supply, you must opt out of the program. **To opt out before being automatically enrolled you must take one of the following actions on or before Month Day, Year:**

Postmark and mail the enclosed opt-out card      *or*      call Waltham’s supplier, at (866) 220-5696      *or*      submit the opt-out form at [Waltham-CEA.com](http://Waltham-CEA.com)

## WALTHAM PRODUCTS & COMPARISON TO EVERSOURCE BASIC SERVICE

	Eversource Basic Service (If you opt out)	Waltham Basic (Option)	Waltham Standard (Automatic)	Waltham Plus (Option)
<b>Price</b>				
Residential	15.772 ¢/kWh	14.950 ¢/kWh	15.346 ¢/kWh	16.455 ¢/kWh
Small Business	15.677 ¢/kWh			
Large Business	17.709 ¢/kWh* (NEMA)			
<b>Duration</b>	Aug 1, 2024, through Jan 31, 2025 *Large Business: Nov 1, 2024, through Jan 31, 2025	Enrollment through December 2025 meter reads	Enrollment through December 2025 meter reads	Enrollment through December 2025 meter reads
<b>Renewable Energy</b>				
State-Required	62%	62%	62%	62%
Voluntary (Class I sources)	None	None	10%	38%
Total	62%	62%	72%	100%
<b>Supplier</b>	Eversource	Dynegy	Dynegy	Dynegy
The Program cannot guarantee savings beyond the current term of Basic Service, because future Basic Service rates are unknown beyond the term above.				

- Program prices apply to service beginning and ending on the days of the month that your meter is read.
- Program prices only apply to the Supply portion of your electric bill. Eversource will continue to set the Delivery charges on your electric bill.
- Tax-exempt small business customers participating in the Program must provide a copy of their Tax-Exemption Certificate directly to Dynegy via email at [Salestax\\_geotax@vistraenergy.com](mailto:Salestax_geotax@vistraenergy.com) or mail at Dynegy, ATTN: Customer Care, P.O. Box 650764, Dallas, TX 75264 in order to maintain their tax-exempt status.
- At the end of the pricing term, you will be automatically renewed in your current product which may have a higher or lower price and a different percentage of voluntary renewable energy as negotiated by the City. The City will announce price changes at least 30 days before any such price change takes effect. Product details will always be available on the website for the Program: [Waltham-CEA.com](http://Waltham-CEA.com).
- The State requires all electricity products to include a minimum amount of renewable energy. The Class I renewables added voluntarily by the City are from new sources located within, or delivered to, New England, and built after 1997. Wind, solar, and low-impact hydro-power are some of the most common sources that qualify for Class I. Using these energy sources provides economic and environmental benefits for our area. For more details on Class I sources and the State minimum required renewables, see [www.mass.gov/service-details/program-summaries](http://www.mass.gov/service-details/program-summaries).
- Information about Basic Service: visit [www.mass.gov/info-details/basic-service-information-and-rates](http://www.mass.gov/info-details/basic-service-information-and-rates) or call Eversource at (800) 592-2000.

### QUESTIONS & SUPPORT

- [Waltham-CEA.com](http://Waltham-CEA.com) has additional details about our program, including a calculator to compare costs.
- To make changes to your enrollment, use the online forms on [Waltham-CEA.com](http://Waltham-CEA.com) or call the supplier at (866) 220-5696.
- For questions or troubleshooting, please contact Good Energy, the City's consultant that oversees the supplier and manages the program, by using the online form on [Waltham-CEA.com](http://Waltham-CEA.com) or calling (339) 204-6820. To speak to someone at the City directly, please contact [fnakashian@city.waltham.ma.us](mailto:fnakashian@city.waltham.ma.us) or call 781-314-3382.
- If you are receiving electricity supply from a competitive supplier, you may have signed up after this mailing list was created. To ensure that you continue to receive your electricity from that competitive supplier and prevent any possible early termination fees, **you must contact Waltham's supplier to opt out of the program.** You can do this via the online form on [Waltham-CEA.com](http://Waltham-CEA.com) or by calling the supplier at (866) 220-5696.