



MESM ACADEMY:

Energy Managers – Reporting Requirements



October 6, 2025
1pm-2pm

NOTIFICATION OF RECORDING

This meeting will be recorded. MAPC may choose to retain and distribute the video, still images, audio, and/or the chat transcript. By continuing with this virtual meeting, you are consenting to participate in a recorded event. The recordings and chat transcript will be considered a public record. If you do not feel comfortable being recorded, please turn off your camera and/or mute your microphone, or leave the meeting.





MESM ACADEMY:

Energy Managers – Reporting Requirements



October 6, 2025
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Today's Lesson

Lesson Question

- How do I complete the quarterly grant reporting requirements to remain in good standing and demonstrate progress?

Learning Objectives

- Understand the specific reporting requirements for the Municipal Energy managers Grant.
- Gather the necessary data and information to meet reporting standards.





Introductory Polls

Rate your level of agreement with the following statements:

- I understand the reporting requirements tied to my position.
- I feel confident in my ability to complete the required reports accurately and on time.

1 = Strongly Disagree
2 = Disagree
3 = Neutral
4 = Agree
5 = Strongly Agree



Meet the Instructors



Lori Timmerman

National Grid



Jennifer Amatore

Eversource



Shannon Donovan

NEED Project



Agenda

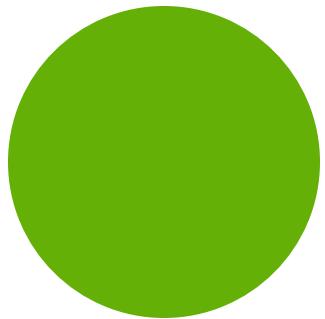
Review Program Goals

Quarterly Reporting

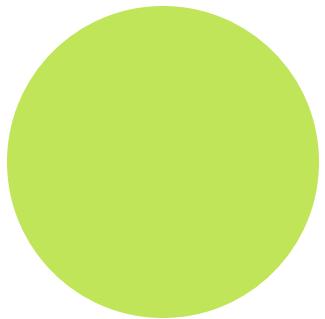
Tools To Consider

Future Reporting

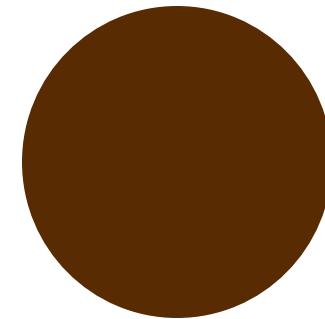
Expectations of Role



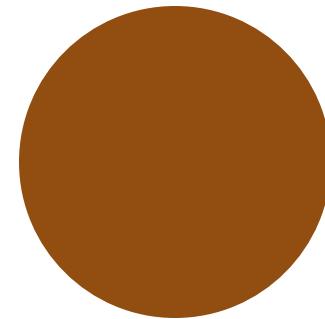
Understand
current energy
management
practices
Partner with
key players



Use technical
assistance to
identify projects
Create goals



Identify funding
options
Make the case
for projects to
proceed



Implement
projects
Track your
progress
Celebrate your
success!

Training and Support

- ✓ Training and professional development forthcoming
 - Tracking and communicating success
 - Navigating Mass Save programs
 - Site visits to high efficiency buildings
 - Heat pump manufacturers
 - DOER Green Communities Mass Energy Insight tool
- ✓ Peer networking as a cohort and with existing municipal energy managers
- ✓ In-person and virtual opportunities



Quarterly Report Elements

- Grants identified and applied for
- Scoping studies and technical assistance
- Work plan progress
 - Energy management assessment & plan
 - List of incentive funding
 - GHG emissions
- Quarterly implementation
 - School and municipal building priorities
- Key learnings and challenges



Grants

Learn about available grants

- Fit for your municipality?
- Key players?
- Timelines and milestones?

Couple to consider:

- Green Communities
 - Fall block due Oct 22
 - Spring block due April 10, 2026
 - Annual Report due Nov 7
 - Green Communities Summit Nov 18
- MassCEC Green School Works – release late fall
- Transforming Energy in Schools Initiative (TESI) - release late fall
 - >40% low-income student population for full decarbonization projects

Quarterly Key Performance Indicators

Number of Grants Applied for:

Click or tap here to enter text.

Grant Applied For:

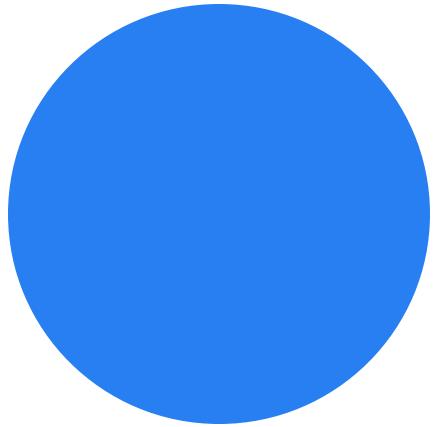
Click or tap here to enter text.

Dollar Amount

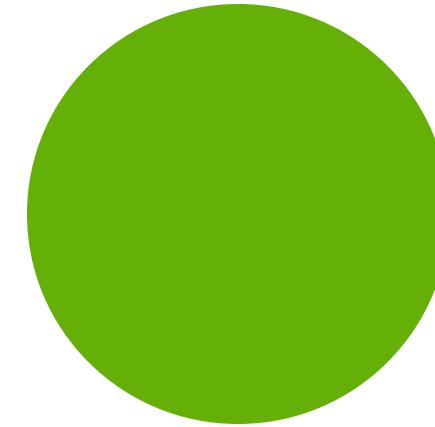
Click or tap here to enter text.

List any grants that you are preparing to apply for:

Studies



Portfolio
Prioritization
Plans



Comprehensive
Building
Assessments

Benchmarking/ Prioritization

Portfolio
Prioritization Plan

*Identify buildings
with greatest
potential; capture
building data*

Decarbonization
Roadmap

*Holistic approach
to **identify** and
plan large scale
decarbonization*

Measure Identification

Comprehensive
Building
Assessment

*Scope
opportunities for
EE + electrification*

Investment Decision

Focused
Study

*Detailed,
actionable project
estimates*

Implementation



INCENTIVE OFFER

Scoping Studies / Technical Assistance Progress

If you are interested in pursuing a Comprehensive Building Assessment or Portfolio Prioritization Plan please contact your utility Municipal Energy Efficiency Representative.

Portfolio Prioritization Plan	<input type="checkbox"/> Not Started <input type="checkbox"/> In Progress <input type="checkbox"/> Complete (please attach a completed assessment as a PDF)
Comprehensive Building Assessments	<input type="checkbox"/> Not Started <input type="checkbox"/> In Progress (List <u>buildings below</u>) <input type="checkbox"/> Complete (List buildings below) CBA Building List: Click or tap here to enter text.
Comments related to Scoping Studies/Technical Assistance Progress:	Click or tap here to enter text.

Work Plan Progress

- 90-day Work Plan
 - Energy Management Assessment
 - Energy Management Plan
 - Comprehensive List of Incentive Funding
 - Green House Gas (GHG) Emissions Inventory of Buildings and Fleet

Examples to consider...



90-Day Work Plan

90 Day Work Plan: *Have you prepared a 90 Day Work Plan that provides an overview of all 90 Day activities and a timeline of all 90 Day activities?*

Please provide details of your plan.
[Click here to upload a PDF](#)

Energy Management Assessment

Energy Management Assessment: *Have you evaluated the current state of energy management practices and policies in your municipality?*

- Not Started
- In Progress
- Complete

Energy Management Plan

Energy Management Plan: *Have you created a target set of buildings and a pipeline of projects for those buildings for energy efficiency and decarbonization projects?*

- Not Started
- In Progress
- Complete

Comprehensive List of Incentive Funding

Comprehensive List of Incentive Funding: *Have you created a comprehensive list of incentive funding available to support identified opportunities in your pipeline?*

- Not Started
- In Progress
- Complete

Green House Gas (GHG) Emission Inventory

Green House Gas (GHG) Emission Inventory of Municipal Buildings and Municipal Fleet: *Have you initiated a GHG emission inventory of municipal buildings and municipal fleet? Have you accessed the building emissions data available through MEI as a source of this information?*

- Not Started
- In Progress
- Complete

[MEI reports webinar June 2024.pdf - Google Drive](#)

See what's coming! Try the new [Beta Site](#).

Organize Data Upload Spreadsheet View Reports ESPM

Learn how to do what you need to do. Each of the brief videos below explores a specific task in the system.

Watch them once or over and over.

Note: the videos below may contain references to legacy reports.

MEI Annual Reports Webform - NEW

MEI Annual Report Webform - Introduction

[Watch Video](#) 6:45

MEI Annual Report Webform - Navigation and Criteria 1&2

[Watch Video](#) 6:53

MEI Annual Report Webform - Criteria 3

[Watch Video](#) 23:42

MEI Annual Report Webform - Criteria 4&5

[Watch Video](#) 12:30

MEI Annual Report Webform - Submitting the Report

[Watch Video](#) 2:21

Getting Started

[Watch Video](#) 15:48

New Reports - NEW

New reports were launched in June 2024. You can learn about the reports in the webinar we held on June 14

[Slides](#), [Recording](#).

Updating & organizing your data

Organize Your Energy Data

[Watch Video](#) 4:32 | [Read the FAQ question for this video - How do I set up my city, town, or agency?](#) - HINT: Start here

Add a New Energy Account

Quarterly Implementation Priorities

Quarterly Implementation Priorities

Municipal Buildings: *What are your municipal building priorities in the next quarter?*

Click or tap here to enter text.

School Buildings: *What are your school building priorities in the next quarter?*

Click or tap here to enter text.

Key Learnings?

Provide a brief summary of your key learnings.

Click or tap here to enter text.

Provide a brief summary of your key challenges.

Click or tap here to enter text.

Reporting Schedule

Report	Due Date
2025	
First Quarterly report	October 2025
2026	
2025 Annual report*	January 2026
Q1 2026	April 2026
Q2 2026	July 2026
Q3 2026	October 2026
2027	
2026 Annual report	January 2027
Q1 2027	April 2027
Q2 2027	July 2027
2025-2027 Final Report	October 2027

*There will be a separate training in early January to cover the annual report criteria

Future Training and Support

- ✓ Training and professional development forthcoming
 - Navigating Mass Save programs
 - Site visits to high efficiency buildings
 - Heat pump manufacturer training
- ✓ Peer networking as a cohort and with existing municipal energy managers
- ✓ In-person and virtual opportunities





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Questions?

WE ARE MASS SAVE®:



EVERSOURCE

The logo for Liberty, featuring a blue and green stylized 'L' icon followed by the word "Liberty" in a bold, black, sans-serif font.

nationalgrid

The logo for Unitil, featuring an orange and blue stylized 'U' icon followed by the word "Unitil" in a bold, black, sans-serif font.



Evaluation Form

**Please take 3-5 mins to please
complete the anonymous evaluation
form (link in chat)!**



Next Steps

- Submit Mass Save Quarterly Report by October 31
- Submit Green Communities Annual Report by November 7

Upcoming Events:

- **October 15:** Peer Learning Meeting
- **October 22:** Optional Office Hours
- **October 27:** Training on Mass Save Program & Incentives
- **November 3:** Training on Grant Writing & Creating Project Pipeline



Thank you!

