

# BERDO REVIEW BOARD PUBLIC MEETING

*April 22, 2024*



# BERDO Review Board



**Rashida Boyd**  
*Board Member*



**Gabriela Coletta**  
*City Councilor*



**Stephen Ellis**  
*Board Member*



**Lovette Jacobs**  
*Board Member*



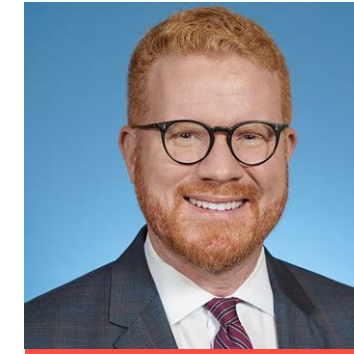
**Gail Latimore**  
*Board Member*



**Lee Matsueda**  
*Board Member*



**Jack Nelson**  
*Board Member*



**Matt O'Malley**  
*Board Member*

# City of Boston Staff



**Hannah  
Payne**

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*Director, Carbon  
Neutrality*



**Diana  
Vasquez**

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*BERDO Review  
Board Manager*



**Zengel  
"Ziggy" Chin**

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*BERDO Review Board  
Assistant*

# Agenda

*Today's Meeting*



- 1. Approval of Meeting Minutes**
- 2. Discussion on Equitable Emissions Investment Fund**
- 3. Update and Discussion on the Hardship Compliance Plan Application Guide**
- 4. Administrative Updates**
- 5. Meeting Adjournment**

# Approval of Meeting Minutes

*Board votes on approving previous meeting's minutes*



# Equitable Emissions Investment Fund

*Update and discussion*



# Decarbonization Funding Landscape

*Other decarbonization programs in Boston*

## Energy Efficiency and Conservation Block Grant Program (EECBG)

- Boston received \$659,990 grant from the Department of Energy. The BERDO team will use the grant funds to provide free zero-over-time (ZOT) building decarbonization services to under-resourced BERDO building owners.

## Mayor's Office of Housing Programs (ARPA)

- [The Large Building Green Energy Retrofits Program](#) offers up to \$10,000 for technical assistance grants to offset the cost of evaluating current energy use and [up to \\$50,000 per unit for deep energy retrofits](#) in affordable housing developments across the City.

## Massachusetts Decarbonize Affordable Housing Program

- [The Affordable Housing Deep Energy Retrofit Grant Program](#) provides grants to fund deep energy retrofits and energy efficiency upgrades, building system electrification, and onsite renewable energy generation in affordable housing developments across the state.

## Mass Clean Energy Center BETA Pilot

- [The Commercial Buildings Pilot program](#) and [Non-Profit Buildings Pilot](#) provide free in-depth building audits to support commercial and nonprofit building owners in planning electrification and decarbonization retrofits.

# Updates From Last Meeting

## [Equitable Emissions Investment Fund Survey](#)

### **Equitable Emissions Investment Fund feedback opportunity:**

- Deadline for the survey has been extended to **April 30 at 5:00pm.**
- Updated deadline has been shared with:
  - *BERDO newsletter recipients,*
  - *Review Board newsletter recipients, and*
  - *Chairs of the commercial and healthcare working groups.*
- The BERDO team has drafted and shared social media and email language to share the public feedback opportunity.



# Potential Options for the EEIF

*Potential options to distribute the funds this first application cycle*

## Option 1: Grant Agreement Approach

- Non-profit organizations that provide building decarbonization services apply to the Fund.
- Any type of building owner is eligible to receive the services from the nonprofit.
- Services provided can encompass any project stage.

## Option 2: Procuring a Service Approach

- The Review Board secures a contract for decarbonization services.
- The Review Board would secure a contract with a vendor (private or nonprofit) that provides decarbonization services with the stipulation that recipients of the services meet Review Board criteria.
- No physical changes can be done in private buildings.

# Application Proposal

*Proposal for a grant agreement*



## **Initial proposal for discussion:**

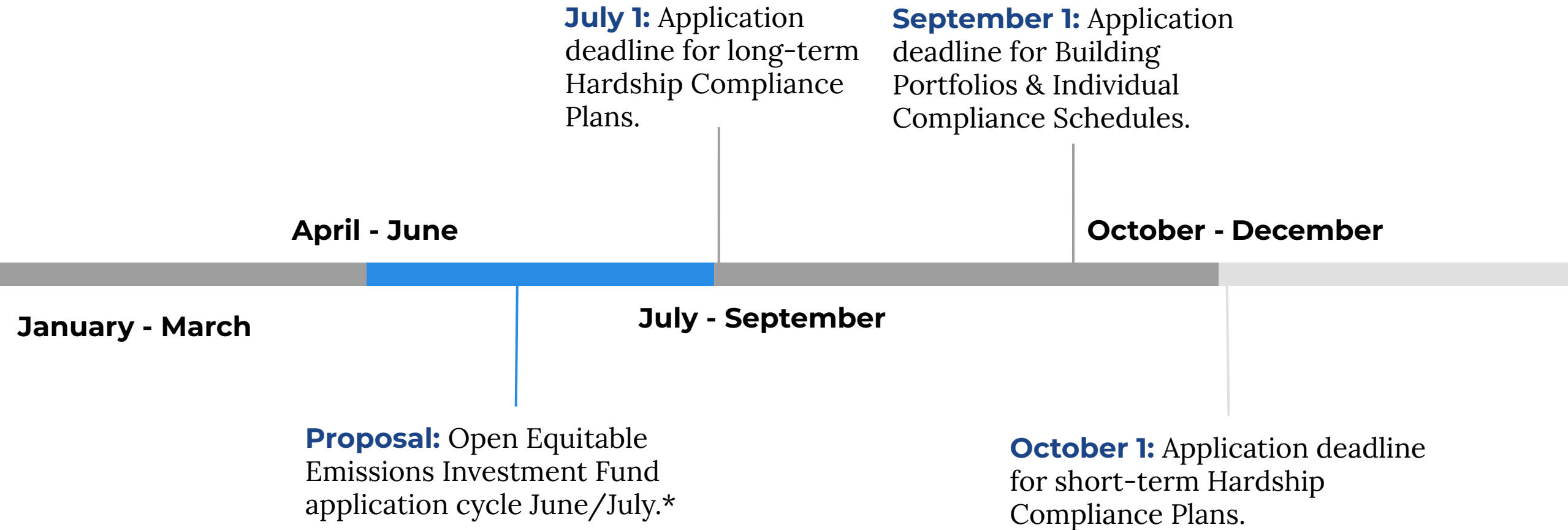
The Review Board release up to \$750,000 for the first application cycle as a grant agreement (Option 1).

## **Rationale:**

- Allows the Review Board to scope out the number of nonprofits organizations that are undertaking decarbonization efforts as part of their regular programming.
- Allows time for the Review Board and the team to learn from the EECBG Building Decarbonization Program and identify gaps that appear.
- The Review Board can develop next steps, such as initiating a procurement process, later this year depending on the interest received for the Fund and/or EECBG application.

# Proposed Application Timeline

Subject to change



*\*Must allow at least 30 days for submissions of applications to the Equitable Emissions Investment Fund.*



# Estimate Timeline for a Request for Proposal

*Estimated timeline for Option 2*

Procurement Step	Estimated Timeframe
Program Planning	1-2 weeks
Initial Draft	1-2 weeks
CB-04 and C&A Forms	2-5 days
Advertising Submission to City Record	Wednesday 10 days before release
Submission to Goods & Services Bulletin (if over \$100k)	Wednesday before release
Release of Request	Monday
Q&A with Potential Vendors	~1 week after release
Submission Due	>10 business days after release
Evaluation of Submissions	1-2 weeks
Award and Negotiation	1-2 weeks
Contract finalization	1-2 weeks

### City Procurement Process

- Estimated length of about 3 months for City procurement process

### Review Board Selection Process

- Establish an application for interested parties to receive services
- Review Board members vote to decide recipients of the services

The background of the slide is a dark blue aerial wireframe map of a city, showing the outlines of buildings, streets, and parks. The lines are white and create a complex, geometric pattern.

# Board Q&A

*Board Members may discuss and ask staff questions*

The background of the slide is a dark blue aerial wireframe map of a city, showing the outlines of buildings, streets, and parks. The lines are white and create a grid-like pattern over the city's layout.

# Public Comment Period

*Members of the public may provide public comment*

The background of the slide is a dark blue aerial wireframe illustration of a city, showing various building footprints and street layouts in a light blue color.

# Hardship Compliance Plan Application

*Updates and discussion*

# Hardship Compliance Plan Application Updates

## [Hardship Compliance Plan Application Guides](#)

**Format:** application will be a report-style application packet with a title page

**Separate applications:** two application guides

- [Short-term application](#)
- [Long-term application](#)

**Confirming eligibility:** an eligibility checklist has been made more prominent

**Clarifying instructions:** An instructions page has been added

**Highlighting hardship:** A case summary section has been added

### Appendix C - Complete Application Checklist

A complete application must include the following components:

- Title page
- Eligibility checklist
- Case summary
- Application body
  - I. Owners Information
  - II. Buildings Covered by the Hardship Compliance Plan
  - III. Evaluation of all BERDO Compliance Mechanisms and Flexibility Measures
  - IV. Emissions Reduction Efforts to Date
  - V. Evaluation of Opportunities, Feasibility, Costs, and Financial Support
  - VI. Demonstration of the Existence of Circumstances or Characteristics that may Create Hardship
  - VII. Demonstration of Eligible Hardship(s)
  - VII. Proposed Relief
- Building owner's signature (and consultant's signature if applicable)



# Sharing Updated Hardship Application

*Communications Plan*



## **Communication plan for updated applications:**

- Update the BERDO [Review Board website](#) and [application page](#)
- Share via the BERDO and Review Board newsletters
- Share with Real Estate Working Group members
- Share with the Green Ribbon Commission

## **BERDO team will present on hardship to:**

- Healthcare Institutions Working Group members on April 25.
- LISC Energy Cohort's affordable housing members on May 21.

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# Public Comment Period

*Members of the public may provide public comment*

The background of the slide is a dark blue wireframe illustration of a city skyline, viewed from an elevated perspective. The buildings are represented by white and light blue lines, creating a complex geometric pattern. A semi-transparent dark blue horizontal band runs across the middle of the image, serving as a backdrop for the text.

# Additional Administrative Updates

*Staff presents administrative updates*

# Technical capacity building with RDH

*Estimate timeline*



- **Task 1: Training and capacity building for Review Board**
  - *March - August 2024*
- **Task 2: On-call technical services**
  - *June - December 2024*
- **Task 3: Prepare Accessible Materials**
  - *March - August 2024*
- **Task 4: Regular check-ins and coordination with city team**
  - *March - December 2024*



# 2024 Meeting Schedule

Second and fourth Mondays

MEETING DATES	
January 8	July 8
January 22	July 22
February 12	August 12
February 26	August 26
March 11	September 9
March 25	September 23
April 8	October 14*
April 22	October 28
May 13	November 11*
<b>May 27*</b>	November 25
June 10	December 9
June 24	December 23*

**May 27 meeting:**

- If we have applications queued by Friday, May 17, move this meeting to Tuesday, May 28.
- If we do not have applications queued by Friday, May 17, cancel this meeting.

# Adjourn

Thank you! A recording and slide deck for this meeting will be available on [boston.gov/berdo-review-board](https://www.boston.gov/berdo-review-board).

