

**Town of Monterey**  
**D.P.U. 15-18**  
**2024 Annual Report**

In accordance with D.P.U. 23-67-A Municipal Aggregation Guidelines Section VI, dated July 9, 2024,  
Please find the following attachments:

|                                               |                            |
|-----------------------------------------------|----------------------------|
| Public Access                                 | (Attachment III.C )        |
| Organizational Structure                      | (Attachment IV.A )         |
| Equitable Treatment of Customer Classes       | (Attachment IV.B.1.c )     |
| Procurement of Supply                         | (Attachment IV.B.2 )       |
| Representative Opt-Out Notification           | (Attachment IV.B.6.a )     |
| Representative Notification of Product Change | (Attachment IV.B.6.b )     |
| Annual Product Information                    | (Attachment IV.B.7.b.i )   |
| Annual Product Rate Component Information     | (Attachment IV.B.7.b.ii )  |
| Annual Renewable Energy Content Information   | (Attachment IV.B.7.b.iii ) |

Submitted separately in a single file containing all Colonial Power Group clients via DOER/SharePoint portal:  
Annual Report (Excel file) (Attachment VI)

| PUBLIC ACCESS TO PLAN/ONGOING PROGRAM INFORMATION |                                                                                                                                 |
|---------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| Description                                       | Location                                                                                                                        |
| Municipal website                                 | <a href="http://www.montereyma.gov/">http://www.montereyma.gov/</a>                                                             |
| Program website                                   | <a href="https://colonialpowergroup.com/monterey/">https://colonialpowergroup.com/monterey/</a>                                 |
| Communication vehicles/ Outreach activities       | Activities posted on municipal website                                                                                          |
| Social media accounts                             | <a href="#">N/A</a><br><a href="#">N/A</a>                                                                                      |
| Municipal cable access TV                         | <a href="https://www.youtube.com/channel/UCewD6lnU8jcTd9gzYV1c46w">https://www.youtube.com/channel/UCewD6lnU8jcTd9gzYV1c46w</a> |
| Announcement to local/regional media              | <a href="https://www.berkshireeagle.com/">https://www.berkshireeagle.com/</a>                                                   |
| Physical posting in municipal buildings           | Town hall, clerk's office, library, senior center, etc                                                                          |
| Municipal departments, boards and committees      | <a href="https://www.montereyma.gov/select-board">https://www.montereyma.gov/select-board</a>                                   |
| Community organizations                           | As appropriate                                                                                                                  |

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| ORGANIZATIONAL STRUCTURE                         |                                                                                                           |                                                                                                                                        |                                                                                                                                                                                                                                           |
|--------------------------------------------------|-----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                  | Performing Entity                                                                                         |                                                                                                                                        |                                                                                                                                                                                                                                           |
| Core Functions                                   | Town                                                                                                      | Consultant                                                                                                                             | Supplier                                                                                                                                                                                                                                  |
| Liaisons/Representatives/Agents                  |                                                                                                           |                                                                                                                                        |                                                                                                                                                                                                                                           |
| Municipal Representative/Agent before Department | <a href="https://www.montereyma.gov/town-administrator">https://www.montereyma.gov/town-administrator</a> |                                                                                                                                        |                                                                                                                                                                                                                                           |
| Liaison with DOER                                |                                                                                                           | X                                                                                                                                      |                                                                                                                                                                                                                                           |
| Liaison with Electric Distribution Companies     |                                                                                                           | X                                                                                                                                      |                                                                                                                                                                                                                                           |
| Plan Elements                                    |                                                                                                           |                                                                                                                                        |                                                                                                                                                                                                                                           |
| Procurement of Supply                            | X                                                                                                         | X                                                                                                                                      |                                                                                                                                                                                                                                           |
| Product Determination                            | X                                                                                                         |                                                                                                                                        |                                                                                                                                                                                                                                           |
| Other Funding/Costs                              | X                                                                                                         |                                                                                                                                        |                                                                                                                                                                                                                                           |
| Customer Enrollment                              |                                                                                                           |                                                                                                                                        | X                                                                                                                                                                                                                                         |
| Customer Notifications/Outreach/ Education       | X                                                                                                         | X                                                                                                                                      |                                                                                                                                                                                                                                           |
| Ongoing Program Information                      | X                                                                                                         | X                                                                                                                                      |                                                                                                                                                                                                                                           |
| Program Termination                              | X                                                                                                         |                                                                                                                                        |                                                                                                                                                                                                                                           |
| Annual Reports                                   |                                                                                                           | X                                                                                                                                      |                                                                                                                                                                                                                                           |
| Customer Service                                 | <a href="https://www.montereyma.gov/town-administrator">https://www.montereyma.gov/town-administrator</a> | Colonial Power<br>866-485-5858 ext. 1<br><a href="https://colonialpowergroup.com/contact/">https://colonialpowergroup.com/contact/</a> | Dynegy Energy Services<br>866-220-5696<br><a href="https://www.dynegy.com/municipal-aggregation/communities-we-serve/Massachusetts/monterey">https://www.dynegy.com/municipal-aggregation/communities-we-serve/Massachusetts/monterey</a> |
| Other (description )                             |                                                                                                           |                                                                                                                                        |                                                                                                                                                                                                                                           |

If a link leads to a "page not found" error, please copy and paste the URL into the address bar of your web browser.

| EQUITABLE TREATMENT OF CUSTOMER CLASSES |                                     |                                     |                                     |                                     |                                     |
|-----------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Plan Element                            |                                     |                                     |                                     |                                     |                                     |
| Procurement                             | Product Rate                        | Other                               | Customer                            | Customer                            | Ongoing                             |
| of Supply                               | Setting/Renewable                   | Funding                             | Enrollment                          | Notification                        | Program                             |
|                                         | Energy Content                      | Sources/Costs                       |                                     |                                     | Information                         |
| (§ IV.B.2)                              | (§ IV.B.3)                          | (§ IV.B.4)                          | (§ IV.B.5)                          | (§ IV.B.6)                          | (§ IV.B.7)                          |
| <input checked="" type="checkbox"/>     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Table IV.B.1.c identifies the Plan elements for which the treatment between customer classes (or subclasses) may vary in order to ensure equitable treatment. The municipality anticipates that varied treatment that reflects the disparate characteristics of each customer class will be reasonable and appropriate.

Customer classes and subclasses differ in many respects such as electrical load, electricity consumption patterns or load factors, interest in and the ability to support enhanced renewable energy or opportunities described in the DOER Best Practices or factors associated with Environmental Justice Populations such as English proficiency. These distinctions are expected to affect all aspects of Program operation. For example, effective and responsive procurement, product determination, enrollment, notification and ongoing customer education efforts will vary between residential and larger commercial or industrial customers due to differences between customers in these classes and their consumption patterns. These factors will necessarily affect the Program’s best practices for all of the elements identified in Table IV.B.1.c. Examples of appropriate, varying treatment for each element are also described below.

**Procurement of Supply** – While supply procurement actions and the expected timeline for each action are typically the same across all customer classes, alternative approaches may be employed for some classes or subclasses, for example in the context of procuring local renewable energy sources consistent with DOER Best Practices.

**Product Information** – Product information may vary by customer class or subclass. Certain customer subclasses differ in material respects in electrical load, electricity consumption patterns, and load factors. The Program therefore may offer such subclasses different rates to mitigate negative outcomes for other customer classes. For example, large industrial Electric Customers who (i) are new Auto-Enroll Customers, (ii) have previously opted out of the Program, or (iii) are being served by a Competitive Supplier may request to join the Program. Given the high monthly usage of such customers, enrollment may be at the then-current market price.

**Other Funding Sources/Other Costs to Participants** – Product funding or costs may vary by customer class or subclass.

**Customer Enrollment** –Customer enrollment may vary by customer class or subclass, including for example with respect to large industrial customers. On a periodic basis, the municipality will (1) automatically enroll new Auto-Enroll Customers, with the exception of new large industrial Auto-Enroll Customers, subject to the opt-out provisions for initial enrollments described above; and (2) provide Non-Auto-Enroll Customers with the opportunity to join the Program on an opt-in basis. Large industrial Electric Customers who (i) are new Auto-Enroll Customers, (ii) have previously opted out of the Program, or (iii) are being served under competitive supply may request to join the Program at the then-current market price.

**Customer Notifications** – Opt-Out notices and procedures, notifications of product change, and customer notification and educational materials and procedures may vary by customer class or subclass.

**Ongoing Program Information** – Access to ongoing Program information will sometimes be differentiated, for example to better accommodate Electric Customers who require specialized translation or assistive technology to aide their access to and understanding of information.

| PROCUREMENT OF SUPPLY       |          |
|-----------------------------|----------|
| Procurement Steps           | Timeline |
| Issue RFQs/RFPs             | 03/20/23 |
| Evaluate/Select Bids        | 04/12/23 |
| Negotiate/Execute Contracts | 04/12/23 |
| Other (description)         | -        |

**MUNICIPAL AGGREGATION GUIDELINES DEFINITIONS (DPU 23-67)**

**Annual Report** – means the report that Municipalities 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 a 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 Companies provide to Electric Customers in their service territory that are not receiving an electric supply product from a Competitive Supplier or through participation in a 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 an entity retained by a city or town (or a group of cities or towns) to assist with the development and operation of a Plan and Program.

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

**Default Product** – means the Product that participants in a 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** – means an investor-owned entity that provides electric distribution service as a monopoly service to Electric Customers in their specified service territories. The Electric Distribution Companies are Fitchburg Gas and Electric Light Company d/b/a Unitil, NSTAR Electric Company d/b/a Eversource Energy, and Massachusetts Electric Light Company and Nantucket Electric Light Company each d/b/a National Grid.

**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** – 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 these Municipal Aggregation Guidelines.

**Municipality** – means a city or town (or group of cities or towns) that (1) operates a Program pursuant to G.L. c. 164, § 134(a), or (2) has filed a Plan for Department approval.

**Opt-In Product** - means those Products that Participants in a 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.

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

**Petition** – means a petition submitted by a Municipality to the Department for review and approval of a Plan.

**Plan** – means the document that a Municipality submits to the Department for approval to administer a Program pursuant to G.L. c. 164, § 134(a).

**Program** – means a program in which a Municipality 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.

**REPRESENTATIVE OPT-OUT NOTIFICATION**

Opt-Out Notifications can be found here: <https://colonialpowergroup.com/monterey-documents/>

**REPRESENTATIVE NOTIFICATION OF PRODUCT CHANGE**

Product Change Notifications can be found here: <https://colonialpowergroup.com/monterey-documents/>

## ANNUAL PRODUCT INFORMATION

### ESA

|                 |                 |        |
|-----------------|-----------------|--------|
| Effective Dates | Nov'23 - Nov'25 |        |
| Supplier Name   | Dynergy Energy  |        |
| Product         | Default         | Option |

### RATE COMPONENTS (\$/KWH)

|                              |                |                |
|------------------------------|----------------|----------------|
| Supply and Renewable Content | 0.14951        | 0.16892        |
| Consultant Services          | 0.00100        | 0.00100        |
| Municipality Services        | -              | -              |
| <b>Total</b>                 | <b>0.15051</b> | <b>0.16992</b> |

### RENEWABLE CONTENT (% OF TOTAL)

|                                  |            |             |
|----------------------------------|------------|-------------|
| Required Other Renewable         | 38%        | 38%         |
| Required RPS Class I             | 24%        | 24%         |
| <b>Total Required Renewable</b>  | <b>62%</b> | <b>62%</b>  |
| Voluntary RPS Class I            | 0%         | 50%         |
| Voluntary National Wind          | 0%         | 0%          |
| <b>Total Voluntary Renewable</b> | <b>0%</b>  | <b>50%</b>  |
|                                  |            |             |
| <b>Total RPS Class I</b>         | <b>24%</b> | <b>74%</b>  |
| <b>Total Renewable</b>           | <b>62%</b> | <b>112%</b> |

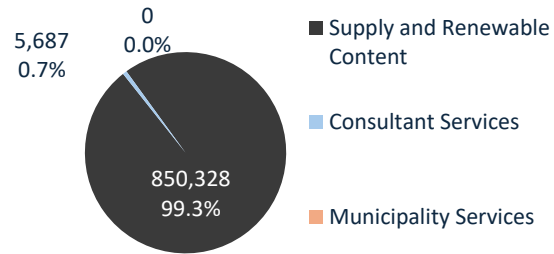
### PARTICIPANTS

|                        | Default    | Option   | Total      |
|------------------------|------------|----------|------------|
| Residential            | 628        | 1        | 629        |
| Residential Assistance | 18         |          | 18         |
| Commercial             | 47         | -        | 47         |
| Industrial             | 3          | -        | 3          |
|                        | <b>696</b> | <b>1</b> | <b>697</b> |

### USAGE

|                        | Default          | Option     | Total            |
|------------------------|------------------|------------|------------------|
| Residential            | 4,503,452        | 133        | 4,503,585        |
| Residential Assistance | 151,997          |            | 151,997          |
| Commercial             | 570,686          | -          | 570,686          |
| Industrial             | 461,145          | -          | 461,145          |
| <b>Total</b>           | <b>5,687,280</b> | <b>133</b> | <b>5,687,413</b> |

| ANNUAL PRODUCT RATE COMPONENT INFORMATION |                 |
|-------------------------------------------|-----------------|
| Rate Component                            | Revenue (in \$) |
| Supply and Renewable Content              | 850,328         |
| Consultant Services                       | 5,687           |
| Municipality Services                     | 0               |
| Other Services                            | N/A             |



### Supply and Renewable Content

The Program Supplier provides all requirements power supply service to Program Participants, which includes all energy, capacity, reserves, and ancillary power supply services. The Program Supplier is required to meet all state mandated renewable energy requirements as well as deliver any voluntary renewable energy content as defined by the municipality.

### Consultant Services

The Consultant administers all aspects of the Program and any resulting contractual agreements, at the direction of municipal officials, including:

- Formulating and carrying out procurement strategies to meet the specific strategic objectives of the Program such as price stability and renewable energy content that exceeds state-mandated minimums
- constantly monitoring and analyzing all the various market and non-market elements that can impact forward market prices, both short-term and long-term, including forward commodity prices, global demand for energy, activities of ISO-NE, legislative proposals, and regulatory changes
- administering procurement processes for energy supply and services
- negotiating agreements with suppliers
- monitoring and reporting on supplier compliance with contract terms and conditions
- monitoring the market activities and financial conditions of Competitive Suppliers.
- fostering constructive working relationships with Competitive Suppliers in ways to effectively and efficiently resolve any consumer issues that may arise
- troubleshooting any contractual issues that may arise and working proactively to resolve potential contractual issues in favor of the Program or individual customer
- investigating and seeking to resolve issues raised by consumers or program suppliers that require action or remedy by the Electric Distribution Company
- refining and renegotiating standard agreements for power supply and services, as necessary, to benefit and protect the Program and Participants
- leading customer education and engagement activities, including speaking at public information sessions, creating and disseminating educational materials, press releases, and notices
- implementing the consumer opt-out process
- coordinating account administration and data sharing with Program Suppliers and the Electric Distribution Company
- preparing program reports and providing regular updates for municipal officials
- engaging with municipal officials, committees, or community groups on Program activities, Program opportunities, or corollary energy market topics
- managing and updating the program website with current information
- managing the Program in compliance with the Guidelines including preparing annual reports.

### Municipal Services:

N/A

| VOLUNTARY ANNUAL RENEWABLE ENERGY INFORMATION |                  |           |
|-----------------------------------------------|------------------|-----------|
| Category of Renewable Energy                  | MWh/Certificates | Mechanism |
| RPS Class I                                   | 0                | NEPOOL    |
| National Wind                                 | 0                |           |
| Other                                         | 0                |           |