

BERDO REVIEW BOARD PUBLIC HEARING

May 13, 2024



Mayor Michelle Wu

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**

*Director,
Carbon Neutrality*



**Diana
Vasquez**

*BERDO Review
Board Manager*



**Dima
Moujahed**

*Project Manager,
Carbon Neutrality*



**Aidan
Callan**

*BERDO Program
Manager*

Agenda

Today's Meeting



Public Hearing

1. Proposal to Open the First Grant Application Cycle of the Fund
2. Proposal to Expend \$500,000 from the Equitable Emissions Investment Fund to Expand the new Building Decarbonization Advisor Program.

Public Meeting

3. Update on Reporting Extension Requests
4. Administrative Updates
5. Approval of Meeting Minutes

Public Hearing

The background of the slide is a dark blue aerial wireframe map of a city, showing the outlines of buildings, streets, and parks. The map is centered and covers the entire area.

Proposal to Open First Grant Cycle of the Fund

Discussion and Vote



Equitable Emissions Investment Fund

From [BERDO Ordinance](#)

Purpose

“Money in the Fund shall be expended for the support, implementation, and administration **of local building carbon abatement projects** that benefit the City of Boston’s emissions reduction goals. Fund expenditures shall **prioritize projects that benefit Environmental Justice Populations** and populations disproportionately affected by air pollution, including by improving or promoting:

- Low-income affordable housing and housing where tenants are at risk of displacement and in need of rent stabilization
- Local air quality improvement;
- Indoor environmental quality and health for building tenants
- Economic inclusion, training, and technical assistance for Minority, Women, and Disadvantaged Business Enterprises (MWDBE) and cooperative contractors
- Equitable workforce development training programs for residents who have been disproportionately impacted by the effects of climate change
- Projects with community ownership of housing and renewable energy infrastructure
- Reduced energy burdens
- Any further environmental initiatives.”

Equitable Emissions Investment Fund

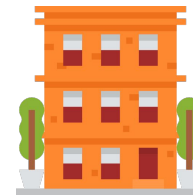
- Seeded with \$3.5 million by the Mayor
 - \$175,000 expended to date on Community Advisory Group facilitation and stipends, and Review Board stipends
- Alternative Compliance Payments (ACPs) will go directly into the Fund
- The BERDO Review Board will review project proposals, make recommendations for expenditures, and set conditions for expenditures.



Alternative Compliance Payments and penalties are paid into the Equitable Emissions Investment Fund



Equitable Emissions Investment Fund collects money



Fund invested in local building carbon reduction projects approved by the Review Board

Public Feedback Opportunity on the Fund

Public feedback opportunity opened on March 15, 2024 and closed on April 30, 2024.



Who submitted feedback

- 3 organizations submitted letters
 - *A Better City*
 - *Boston Climate Action Network*
 - *Sierra Club Massachusetts*
- 50 ACE members sent emails
- 10 individuals responded to the survey

Summary of Public Feedback on the Fund

Core themes identified from submitted letters and emails

Draft Application Outline

- Suggestions to request more information from applicants
 - *An applicant's funding accomplishments*
 - *An applicant's financial size and stability (990 form)*
 - *References for project team members*
 - *For contractors, request a list of relevant projects and references*
- Suggestion to cut the question asking for resumes
- Suggestions to add tenant-specific questions
 - *Whether any tenants will be displaced and plans for relocation assistance*
 - *Ask if building owners are willing to sign a rent stabilization agreement*
- Add a question explicitly asking plans to use labor from local, co-op, MBWE, disadvantaged business enterprises, and/or local workforce development programs

Draft Evaluation Form

- Suggestion to emphasize the need for a building emissions reduction component
- Suggestion to add new sections that clarify how projects will be evaluated during and after a project is selected to receive money from the Fund
- Requests for clarify regarding the indoor air quality criteria and the "other" criteria

Updates Based on Feedback

Updates we recommend on application outline and evaluation form based on feedback

Draft Application Outline

- Suggestions to request more information from applicants
 - *An applicant's funding accomplishments*
 - *Update the question to allow an applicant to include accomplishments they think would be appropriate to add to their application*
 - *An applicant's financial size and stability (990 form)*
 - *Clarifying this will be asked in the google form application*
- Add a question explicitly asking plans to use labor from local, co-op, MBWE, disadvantaged business enterprises, and/or local workforce development programs
 - *Adding a question of the applicant and any subcontractors if they qualify for any of these criteria*

Draft Evaluation Form

- Suggestion to emphasize the need an building emissions reduction component
 - *Update evaluation form to make it clear that building emissions reduction is required*

Summary of Public Feedback on the Fund

Summary of Fund survey responses



- 60% of respondents were aware of the Fund, 40% were not.
- 80% of respondents were interested in applying, 20% were unsure.
- 60% of respondents were either service providers or building owners, 40% selected other:
 - *One building owner and service provider*
 - *One building owner and affordable housing admin*
 - *One hospital administrator*
 - *One nonprofit worker*
- A wide range of buildings.
 - *Building uses included residential, commercial, medical, and education*
- High interest for projects related to energy efficiency, renewable energy, fuel switching, and other technology solutions.
- A majority (66%) of respondents are interested in scoping, 44% in designing a project, 33% in funding a phase of a project, and 1 responded other.
- A majority of respondents (40%) are unsure how much money they are interested in, 30% are interested in \$1-3 million, 20% in \$50 - 500k, and 10% in \$500k - 1 million.
- Respondents believe they can incorporate into a project proposal all of the listed environmental justice benefits.
- Additional comments in shared folder.

Review of Application Proposal

Proposal for opening an initial grant program

Proposal for first application cycle:

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

Rationale:

- Initial cycle would allow the Review Board to begin to engage with nonprofits organizations that are undertaking decarbonization efforts as part of their regular programming and to better understand the existing landscape in Boston.
- Creates an opportunity to support and expand local initiatives that advance environmental justice.
- This would not prohibit simultaneously opening an RFP for planning and scoping services should the Review Board desire to do so.

First Application Cycle of the Fund

Proposed Process and Timeline

Proposed Process

Release a notice for the Equitable Emissions Investment Fund granting opportunity

- Open application on **Friday, May 31, 2024**
- Close application on **Friday, July 12, 2024**

Eligibility

- Applicants: Nonprofit organizations (registered 501c3 or organization with a fiscal sponsor).
- Projects must include:
 - *Reductions in building emissions in Boston*
 - *Benefits to Environmental Justice Populations and populations disproportionately impacted by air pollution*



Issued by:
City of Boston,
Environment Department

Issue Date: Friday, May 31, 2024, 9 am ET
Closing Date: Friday, July 12, 2024, 5 pm ET

Inquiries:
Questions should be directed to
BerdoReviewBoard@boston.gov



First Application Cycle of the Fund

Proposed Process and Timeline

Application Form

- Google Form fleshing out the questions from [the application form outline](#).
 - *Alternative methods of submission available upon request.*

Awards

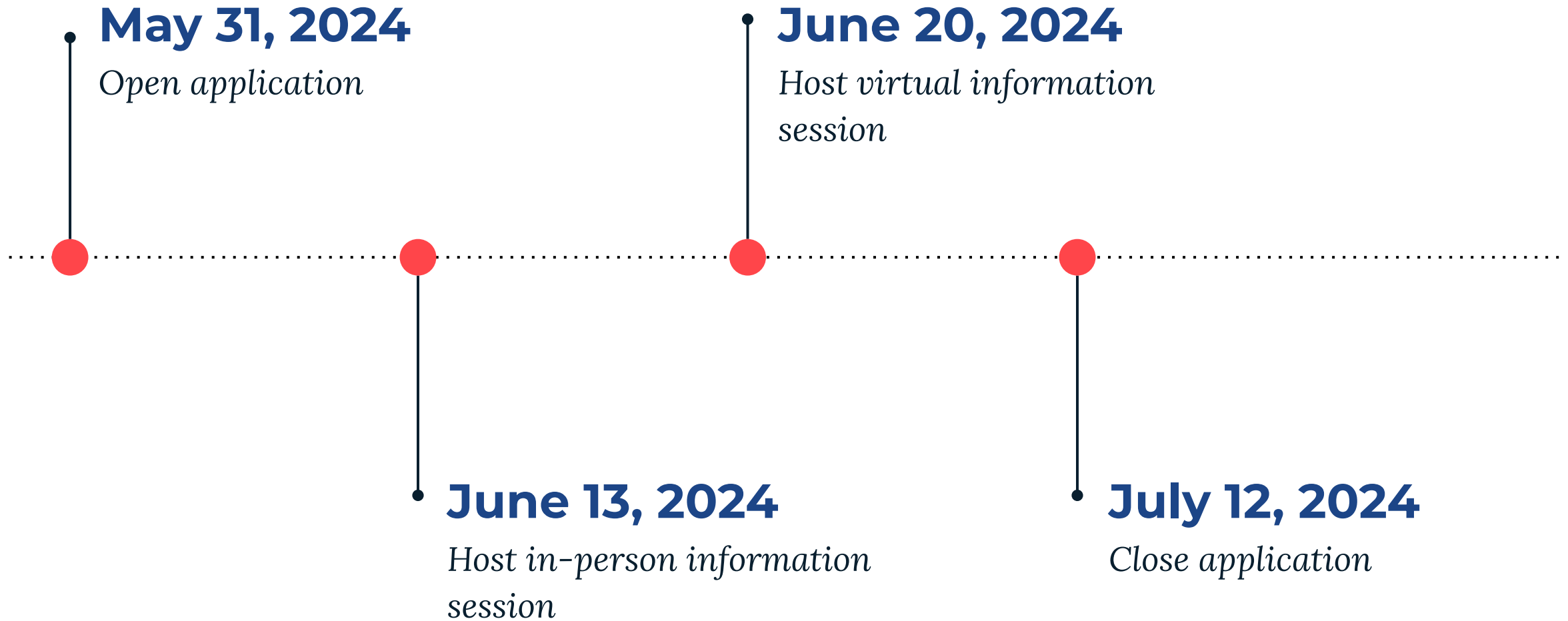
- Preference to grant multiple awards, targeting up to \$250,000 per award.
 - *Subject to change based on applications received and the board's discretion.*

Additional information

- A Frequently Asked Questions (FAQs)
- Two information sessions for interested parties

Dates	Times	Location
June 13, 2024	12 - 1pm	In-person (City Hall)
June 20, 2024	10 - 11 am	Virtual (Zoom)

Proposed Application Timeline



Proposed Outreach Plan

- **Plan to share the granting opportunity via:**
 - *An Equitable Emissions Investment Fund website*
 - *The City of Boston [grants website](#)*
 - *Reaching out to individuals who responded to the public feedback opportunity and indicated interest*
 - *Newsletters:*
 - *BERDO*
 - *BERDO Review Board*
 - *Environment Department*
 - *Environment Department's social media*
 - *Reaching out community partners and community advisory group members*
 - *Review Board members*
- **Plan to work with Environment Department's Community Engagement Manager to help spread opportunity more widely.**

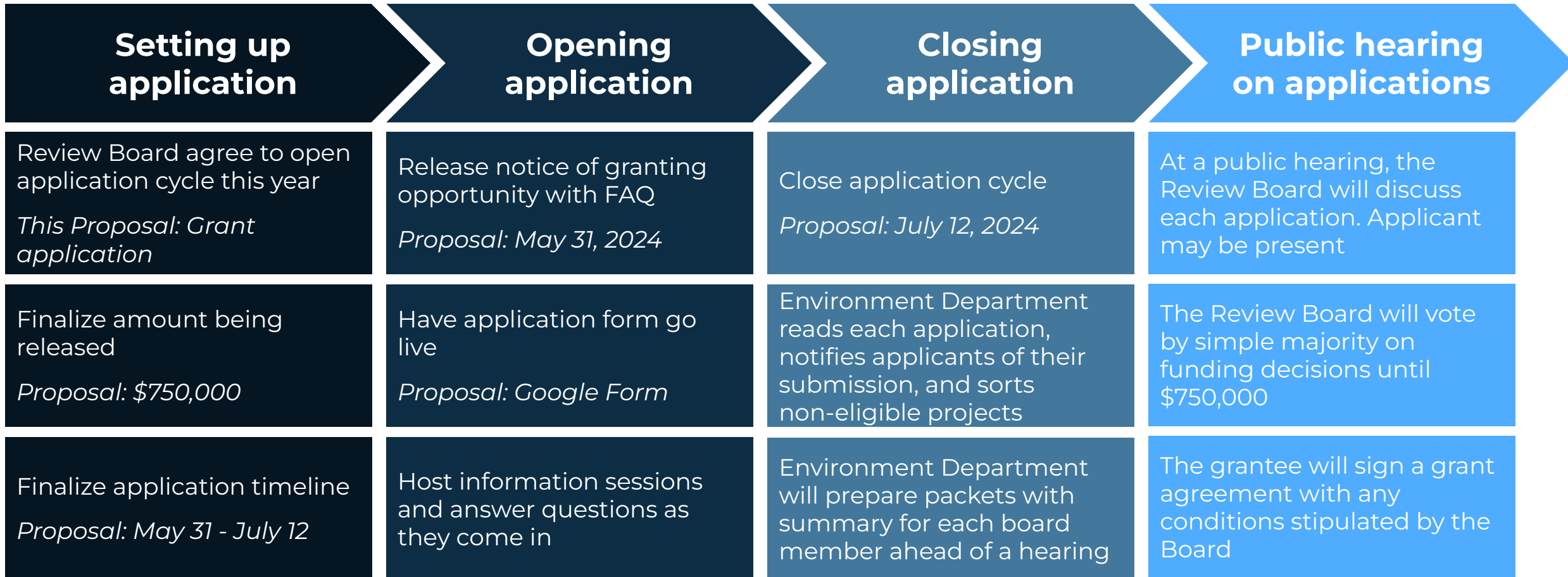
How Applications are Evaluated

Project Evaluation

Applications will be evaluated by the Review Board a public hearing

- Review Board will evaluate submitted applications [based on the following criteria:](#)
 - Emissions reductions (this component is required for all applications);
 - Benefits to affordable housing;
 - Benefits to tenants;
 - Benefits to labor and workforce development;
 - Benefits to outdoor air quality;
 - Benefits to indoor air quality and quality of life;
 - Climate resilience benefits;
 - Energy justice benefits;
 - And other benefits

Summary of Application Process



Proposed Next Steps

Staff propose:

- The Review Board release up to \$750,000 for the first grant application cycle of the Equitable Emissions Investment Fund as presented.

Notes:

- *Actual funding awards to specific projects up to \$750,000 would be made during future public hearing(s).*
- *Board may choose to make multiple awards up to \$750,000 or choose to not expend the full \$750,000 following review of applications.*

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. The overall aesthetic is modern and architectural.

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 light blue, creating a technical, architectural feel.

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.

Board Motion & Vote

The Board may make a motion & vote

The background of the slide is a dark blue wireframe illustration of a city skyline, showing various building shapes and structures from an aerial perspective.

Proposal to expend \$500,000 from the Equitable Emissions Investment Fund to expand the new Building Decarbonization Advisory Program

Discussion and Vote

Building Decarbonization Advisory Program

Existing Funding Sources



Energy Efficiency Conservation Block Grant

- Awarded a \$659,990 Energy Efficiency Conservation Block Grant (EECBG) from the Department of Energy to develop a **Building Decarbonization Advisory Program**.
- Will provide **planning and scoping work** for under resourced BERDO building owners.
- Anticipating being able to serve approximately **60 buildings** with EECBG funds.
- 40% of funds must be spent in Justice 40 (environmental justice) neighborhoods.

American Rescue Plan Act (ARPA) Funds

- ARPA funds **can be used for in-building projects** in eligible properties.
- Approximately \$500,000 to **support energy efficiency and building emissions reductions** in eligible buildings.
- Proposing to use this funding to close gaps in **“quick win”** decarbonization projects identified through scoping.

Who would this program serve?

Program is designed for under-resourced BERDO building owners:

Residential buildings

- Self-managed with low condo fees and/or below market rents
- Low-income and affordable housing
- Older buildings
- Justice 40 and EJ census tracts

Commercial buildings

- Small Businesses
- Nonprofits and houses of worship
- Prioritize Justice 40 and EJ neighborhoods

Program Proposal

Contract with building science firm(s)

- Must be Mass Save preferred vendor(s) to maximize Mass Save incentives

Eligible building owners will be able to receive:

1. Planning, scoping, and technical assistance, proposing to target \$10,000 per building and cap at \$15,000 per owner:
 - Customized “Zero Over Time” Plan and BERDO compliance strategy
 - Technical recommendations for energy efficiency and decarbonization projects
2. Additional ARPA funding may be applied to close gaps in small projects implemented in 2025 and 2026.

Program will be delivered through cohorts:

- Cohorts will run for approximately 3-4 months each. Number of buildings served will depend on vendors’ capacity.
- Will allow for rolling applications.

Proposal for the Fund

The Fund could expand the number of buildings served by Decarbonization Advisory Program

- **\$500,000** from the Fund could serve approximately **50 additional BERDO buildings**.
- Scope of work would be the same for EECBG and EEIF funds.

If using money from the Fund:

- The vendor would be required to provide periodic updates to the Review Board.
- The Review Board may add criteria for selecting the building owners served with EEIF.

Proposed Timeline



Order of Events

1. Release Request for Proposals (RFP) following internal approvals and process.
2. Leave open for 4-6 weeks to allow for enough time for responses.
3. 1 week interview period.
4. Make award and contract.
 - *Goal to have vendor(s) on board by September, 2024.*
5. Run first cohort this coming fall.
 - *Goal to have the first cohort receive completed plans by the end of the year.*
 - *Second cohort would start in early 2025.*

We expect a multi-year contract.

Proposed Next Steps

Staff propose:

- The Review Board expends \$500,000 from the Equitable Emissions Investment Fund to expand the Building Decarbonization Advisory Program as presented.

Alternative option:

- Forego using The Fund in the proposed Decarbonization Advisory Program at this time with the option of releasing a separate Request for Proposals (RFP) in 2025 for scoping and planning tasks that leverages insights gained from this program's initial cohort.

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 light blue, creating 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 light blue and create a complex, geometric pattern.

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.

Board Motion & Vote

The Board may make a motion & vote

Public Meeting

The background of the slide is a dark blue aerial wireframe map of a city, showing the outlines of buildings, streets, and parks. The map is rendered in a light blue color, creating a technical and architectural feel.

Update on Reporting Extension Requests

Update and Discussion

BERDO Reporting Extension Requests

Reminder and Update

Reporting deadline is **May 15**

- This is for 2023 energy and water data

The Review Board approved delegating authority to approve up to two, three-month extensions to Environment Department **starting May 1**

- Only for this year (2024) and requested regular updates
- Only for building owners facing the following circumstances:
 - *Despite receiving a timely request, one or more utility has been unable to provide necessary data.*
 - *A building owner has to verify their 2023 data and despite a timely request, the verifier will not be able to complete the verification by the May 15 deadline.*
 - *A building owner is waiting on information from the BERDO team that is necessary to complete reporting.*
 - *Other (please explain)*

BERDO Reporting Extension Requests

Reminder and Update



As of Monday, May 13, 2024:

- 146 requests for extensions have been made:
 - 14 - *Waiting for information from the BERDO team to complete reporting*
 - 18 - *Engaged a third-party verifier but they are unable to complete the work before the deadline date*
 - 54 - *One or more utility is unable to provide necessary data in time*
 - 60 - *Other with an additional explanation*
- 111 requests have been accepted
- 35 requests have been denied.

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 light blue and create a complex, geometric pattern.

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*
May 27*	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.

Approval of Meeting Minutes

Board votes on approving previous meeting's minutes

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).



Draft Evaluation Form

Criteria	Highly Advantageous	Advantageous	Not Advantageous	Not Present
Emissions reductions	<i>Building emissions reductions are clearly defined, expected timeline and scale are clearly outlined, and are realistic.</i>	<i>Building Emissions reductions are mentioned, but timeline and scale are unclear or results are moderate emissions reductions.</i>	<i>Building emissions reductions are limited.</i>	<i>Building emissions reductions are not mentioned.</i>
Benefits to affordable housing	<i>Affordable housing benefits are clearly defined, expected timeline and scale are clearly outlined, and are realistic.</i>	<i>Affordable housing benefits are mentioned, but timeline and scale are unclear or are not a main focus.</i>	<i>Affordable housing benefits are limited.</i>	<i>Affordable housing benefits are not mentioned.</i>
Benefits to tenants	<i>Tenant protections are clearly defined, expected timeline and scale are clearly outlined, and are realistic.</i>	<i>Tenant protections are mentioned, but timeline and scale are unclear or are not a main focus.</i>	<i>Tenant protections are limited.</i>	<i>Tenant protections are not mentioned.</i>
Benefits to labor and workforce development	<i>Labor benefits and workforce development benefits are clearly defined, expected timeline and scale are clearly outlined, and are realistic.</i>	<i>Labor benefits and workforce development benefits are mentioned, but timeline and scale are unclear or not a main focus.</i>	<i>Labor benefits and workforce development are limited.</i>	<i>Labor benefits and workforce development are not mentioned.</i>
Benefits to outdoor air quality	<i>Outdoor air quality benefits are clearly defined, expected timeline and scale are clearly outlined, and are realistic.</i>	<i>Outdoor air quality benefits are mentioned, but timeline and scale are unclear or not a main focus.</i>	<i>Outdoor air quality benefits are limited.</i>	<i>Outdoor air quality benefits are not mentioned.</i>
Benefits to indoor air quality and quality of life	<i>Benefits to indoor air quality and quality of life are clearly defined, expected timeline and scale are clearly outlined, and are realistic.</i>	<i>Benefits to indoor air quality and quality of life are mentioned, but timeline and scale are unclear or not a main focus.</i>	<i>Benefits to indoor air quality and quality of life are limited.</i>	<i>Benefits to indoor air quality and quality of life are not mentioned.</i>
Climate resilience benefits	<i>Climate resilience benefits are clearly defined, expected timeline and scale are clearly outlined, and are realistic.</i>	<i>Climate resilience benefits are mentioned, but timeline and scale are unclear or not a main focus.</i>	<i>Climate resilience benefits are limited.</i>	<i>Climate resilience benefits are not mentioned.</i>
Energy justice benefits	<i>Energy justice benefits are clearly defined, expected timeline and scale are clearly outlined, and are realistic.</i>	<i>Energy justice benefits are mentioned, but timeline and scale are unclear or not a main focus.</i>	<i>Energy justice benefits are limited.</i>	<i>Energy justice benefits are not mentioned.</i>
Other benefits	<i>Other benefits included in the proposal are clearly defined, expected timeline and scale are clearly outlined, and are realistic.</i>	<i>Other benefits are included in the proposal, but timeline and scale are unclear or not a main focus.</i>	<i>Other benefits included in the proposal are limited.</i>	<i>Other benefits are not mentioned.</i>

Description of Each Criteria



Criteria	Description
Emissions reductions	The expected timeline and scale of direct Emissions reductions produced by the proposed project. Review Board members may consider metrics such as expected absolute Emissions reductions or expected Emissions reductions achieved per dollar spent.
Benefits to affordable housing	The expected timeline and scale of direct benefits provided to low-income residents or residents of affordable housing, including, but not limited to, whether projects will support the development or protection of low-income or affordable housing.
Benefits to tenants	The expected timeline and scale of direct benefits provided to low-income residents or residents of affordable housing, including, but not limited to, whether projects include anti-displacement measures, such as rent stabilization, rent assistance, and/or relocation assistance.
Benefits to labor and workforce development	The expected timeline and scale of benefits to local labor and workforce development, including equitable employment and contracting standards, living wage standards, and the hiring of local contractors, cooperative contractors, Minority, Women, and Disadvantaged Business Enterprises, and/or trainees or recent graduates from local workforce development programs.
Benefits to outdoor air quality	The expected timeline and scale of direct emissions reductions of criteria air pollutants, including carbon monoxide, lead, ground-level ozone, nitrogen dioxide, particulate matter, and sulfur dioxide.
Benefits to indoor air quality and quality of life	The expected timeline and scale of improvements related to indoor air quality, thermal comfort, and/or reduced energy bills for building occupants produced by the proposed project.
Climate resilience benefits	The expected timeline and scale of climate resilience benefits produced by the project, including heat resilience, energy resilience, and coastal and stormwater flood management.
Energy justice benefits	The expected timeline and scale of benefits related to reducing Energy bills for building occupants and/or contributing to community ownership or control over Energy infrastructure.
Other benefits	Other benefits presented by the applicant and evaluated at the discretion of the Review Board. This may include the proposed project's replicability, scalability, uniqueness, urgency and timeliness.

Review of RFP process



- **General timeline and process**

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