



# **TOWN OF HARVARD**

COMMUNITY CHOICE AGGREGATION

Consulting Services



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TO: Ms. Marie Sobalvarro, Assistant Town Administrator  
FROM: Mark Cappadona  
RE: Community Choice Aggregation Consulting Services Proposal  
DATE: April 23, 2018

Colonial Power Group, Inc. (CPG) is pleased to have the opportunity to respond to the Town of Harvard's Community Choice Aggregation Consulting Services Request for Proposals (RFP).

The accompanying proposal details how CPG will create a plan to aggregate the electrical load of consumers within Harvard in consultation with the Massachusetts Department of Public Utilities and the Massachusetts Department of Energy Resources. It demonstrates how we will perform all services related to administering the Town's Community Choice Aggregation Program.

As you will note in our proposal, CPG possesses all of the required qualifications necessary to design, implement and manage your municipal aggregation. Thus far, CPG has implemented 53 state-approved municipal aggregations and is currently contracted with an additional 11 communities with state-approved aggregations to do the same. **Our sole focus is community-based municipal aggregation.** That means that we devote 100% of our time to the needs of our client communities and the end users of electricity who live and do business within these towns.

CPG is also the first consultant to have a community take a revenue stream from the municipal aggregation to support its Energy Manager position. This would allow the Town to further its relationship with CPG as the municipal aggregation matures. Moreover, it would enable the Town to begin exploring all other aspects of municipal aggregation in the future.

This price proposal will remain firm for 90 days following the proposal opening.

We appreciate your consideration of this proposal and look forward to the opportunity to assist the Town of Harvard in becoming the next community to join those already realizing the benefits of municipal aggregation. Please feel free to contact us with any questions.

Sincerely,

Mark Cappadona  
President

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RESPONSE TO THE

**TOWN OF HARVARD  
COMMUNITY CHOICE AGGREGATION  
CONSULTING SERVICES**

REQUEST FOR PROPOSALS

PREPARED BY



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Massachusetts Projects

Total Meters, Usage & Savings

Public Education and Notification Materials

    Marlborough's Webpage

    Consumer Notification Form

    Public Notice

    Public Service Announcement

    Social Media Announcement

    Frequently Asked Questions

Broker's License

## 1 EXPERIENCE

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Colonial Power Group, Inc. (CPG) has unparalleled experience in the development and implementation of programs for municipal aggregation for all classes of eligible, retail consumers pursuant to M.G.L. c. 164, § 134. We are **the only consultant/electricity broker licensed by the Commonwealth of Massachusetts with a successful 15-year track record** of doing so.

CPG has been in the municipal aggregation business for over a decade and has helped procure billions of kWh of electricity for our government, commercial, industrial, and residential clients. At no cost and no risk to our municipal clients, we have engineered a process that has advanced the competitive market for electricity in Massachusetts and saved millions of dollars for the end-users in our client communities. We work closely with our clients to formulate buying and hedging strategies to meet their specific strategic objectives. We understand utility tariffs, ISO tariffs, pricing schedules and how to design and manage purchasing strategies and contracts to provide our clients with both economy and risk mitigation.

CPG has been assisting communities in the design, implementation, and management of municipal aggregations since 2002. We are currently **the largest provider of municipal aggregation services in Massachusetts**. CPG has successfully performed these services for more than 60 communities. CPG is the only municipal aggregation consultant in Massachusetts whose sole focus is municipal aggregation in Massachusetts.

## 2 PROGRAM GOALS

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### 2.1 RENEWABLE ENERGY

CPG delivered the first and only additionality in Massachusetts for a municipal aggregation. The Town of Lancaster (“Lancaster”) was in the process of developing a municipally owned solar array. Lancaster wanted to utilize the power produced by the solar array but wondered how the community would pay for the bonds required to build it. CPG worked with Lancaster and the Competitive Supplier who was serving Lancaster’s Community Choice Power Supply Program to have the Competitive Supplier purchase the Renewable Energy Certificates (RECs) produced by the solar array; therefore, meeting the Competitive Supplier’s Renewable Portfolio Standard (RPS) requirements for the municipal aggregation. Any excess RECs were purchased by the Competitive Supplier at a fixed price paid to the solar project. The RECs were either incorporated into the Competitive Supplier’s requirements for existing load obligations or managed by the Competitive Supplier in the wholesale market. This creative financing approach along with the Competitive Supplier’s ability to procure all RECs produced and manage the excess RECs not consumed by Lancaster allowed Lancaster to become the first community in Massachusetts to actually create additionality using its municipal aggregation.

CPG has experience and a method of creating as much additionality as the Town desires to meet the needs, goals and objectives of the municipal aggregation. Furthermore, CPG would use all the attributes of the additionality to serve the municipal aggregation and, to the extent the attributes exceed the needs of the municipal aggregation, CPG has the ability to place those excess attributes with other loads in Massachusetts. Depending on the Town's desire to create additionality, CPG will issue a Request for Proposals (RFP) for power supply which will request bids to supply the municipal aggregation's load via a Power Purchase Agreement (PPA). The PPA can be part of or separate from the power supply procurement that takes place for the basic needs and requirements of the municipal aggregation.

CPG also has the ability to go out to the wholesale market and procure incremental RECs the Town is looking to add to its existing, state-mandated requirements and obligations and/or PPA sources. In an effort to reduce the cost the Town pays for these incremental RECs, procurement can be source-specific and direct with the Competitive Supplier rather than through a broker. As market rules change in Massachusetts for RPS, CPG can work with the Town to tailor and adjust the procurement of renewable energy to, at a minimum, comply with the requirements or go above-and-beyond. CPG can identify opportunities to save money and work with the Town to customize solutions to bring those savings and benefits directly to the end users. One example would be negotiating for the municipal accounts with fixed prices for electricity at a 15% to 20% discount from Basic Service rates, in current market conditions.

CPG is the only municipal aggregation consultant assisting communities with their desire for local renewable energy projects. CPG is a pioneer in helping communities develop, finance and deliver community renewable projects that use the municipal aggregation as a mechanism for the renewable project's energy and attributes.

CPG's approach to energy procurement is highly specialized and specifically tailored to each of our client community's needs and wants. CPG's individualized approach will provide the Town with the ability to define its own energy goals, all while delivering the lowest prices on the renewable energy resources selected. This method allows for local decision-making to be enhanced by professional energy experience that is changing the current paradigm.

## **2.2 COMMUNITY PROJECTS**

CPG is the first and only consultant to have communities utilize a revenue stream from their municipal aggregations to support their Energy Manager positions. CPG worked with numerous communities to incorporate Energy Manager funding into their municipal aggregation plans. All have been approved by the Massachusetts Department of Public Utilities (DPU) and the Cities of Lowell, Haverhill and Gardner as well as the Towns of Auburn and Berlin are actively leveraging this benefit. This revenue stream creates an opportunity for the community to hire additional staff, not funded through taxes, and implement or expand existing energy efficiency programs, for example, not funded through government programs or grants.

There are other opportunities for CPG to assist the Town with community projects. For example, CPG could work with the Town to identify existing assets that could generate additional revenues. One example exists today in utilizing existing standby generation that qualifies as capacity in the wholesale market.

The Massachusetts Department of Energy Resources (DOER) is currently exploring energy storage and the benefits that it can bring to Massachusetts. CPG can work with the Town to understand what the benefits can be on the subjects of energy storage, micro-grids and energy security. Integrating community projects with municipal aggregation requires a thoughtful, coordinated approach and where-needed customization to the Town's goals and objectives.

CPG's experience and track record with renewable energy can be expanded to include community projects such as energy efficiency, existing standby generation as well as alternative technologies.

### **2.3 GREEN POWER AND LONG-TERM OFFERINGS**

CPG views municipal aggregation as the conduit for municipalities to create and specify the energy resources they would like to supply power to their communities. In this regard, CPG has been very active in pioneering a change in the paradigm by which municipalities are able to procure renewable energy now and in the future. CPG's innovative approach to renewable energy procurement provides municipalities with the ability to choose one or more available renewable energy sources, the amount of energy supplied and the term of the commitment. By utilizing CPG's experience and industry relationships, the Town will have the ability to not only determine a desired level of additionality to include in their energy portfolio but to create long-term price stability and drive down the overall cost of energy purchased.

As part of our additionality procurement program, CPG will work with the Town to custom design a renewable resource RFP that will be issued to all qualified and licensed suppliers of renewable energy resources. This methodology benefits the community in the following ways: (i) creates a transparent, competitive bidding process; (ii) creates a stable price through a long-term energy contract; (iii) creates jobs that benefit the local and/or Massachusetts economy; and (iv) adds new, renewable generation needed to meet the increasing RPS requirements in Massachusetts.

### **2.4 ADDITIONALITY**

Additionality in the municipal aggregation arena allows the community to make a choice about adding new, renewable resources to the ISO-NE grid that would not otherwise be built without the municipality's decision to invest in that particular renewable energy project. If an existing project has an existing Massachusetts Class I status, procuring RECs from this resource does not generate additionality. This project has already been built and assigned Massachusetts Class I status and is therefore, by definition, not creating additionality for the Community Choice Aggregation. This project certainly may have created additionality for some other entity prior to it being built but, once built, the additionality could not be claimed by another entity. As long as the additionality that is being created is a new, renewable energy resource then there should be a direct correlation between additionality and Greenhouse Gas (GHG) reductions. CPG does not believe that additionality can be claimed when purchasing RECs from an existing facility.

CPG is the only municipal aggregation consulting company to actually create additionality in the state of Massachusetts. This is not only a concept. This is a project that is, in fact, up and running in Massachusetts and is currently producing energy for Lancaster. The RECs are being purchased by the Competitive Supplier to meet its RPS requirements for the municipal aggregation.



### 3 SCOPE OF SERVICES

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#### 3.1 LEGISLATIVE RESEARCH

CPG has assiduously researched and reviewed all state legislation directly and indirectly related to municipal aggregation, as well as any past and pending matters before the DPU. CPG currently monitors federal legislation and the decisions of the Federal Energy Regulatory Commission (FERC) and ISO New England (ISO-NE) as they relate to municipal aggregation. CPG will continue to review and monitor any subsequent amendments to any state legislation (e.g., the Green Communities Act of 2008, and its subsequent amendments).

CPG meets regularly with officials at the DPU, the DOER, and the Massachusetts Attorney General's Office of the Ratepayer Advocate to discuss methods of enhancing the approval and operational phases of municipal aggregation programs.

CPG's legal counsel, James Avery of Pierce Atwood LLP ("Pierce Atwood") has more than 25 years of experience in energy and utility law. Mr. Avery has represented a variety of clients in a wide range of regulatory proceedings before the DPU, the Massachusetts Energy Facilities Siting Board and other state utility commissions. Mr. Avery has also represented clients in commercial and financial transactions, including acquisitions, mergers, corporate restructuring, contracts and financings. Mr. Avery has guided more communities through the municipal aggregation process than any other attorney in Massachusetts.

#### 3.2 DEVELOPMENT OF MUNICIPAL AGGREGATION PROGRAM & PLAN

CPG possesses the thorough understanding of load profiling, power procurement and pricing issues required to perform the essential functions of operating the Town of Harvard's ("Town") Municipal Aggregation Program ("Program"). CPG looks forward to the responsibility for all technical and legal aspects of analyzing load data, administering the RFP process, leading negotiations with the Competitive Suppliers, and providing ongoing management and monitoring on behalf of the Town's eligible consumers. CPG has performed these exact tasks for each of our current clients.

CPG shall continually identify the types of services and goals the Town may wish to include in its contract with the Competitive Suppliers. CPG will draft procurement documents for the Town that include:

- analysis of the Town's historic and projected power supply needs;
- 12-months of historical usage for every eligible Basic Service account in the Town, as identified by the Local Distributor; and
- Installed Capacity (ICAP) tags for each eligible account.

CPG will identify options for obtaining and implementing a power supply contract for all rate classifications based on the historic and projected power supply needs. This will include identifying Competitive Suppliers capable of serving the Town's load. CPG has strong working relationships with all state-licensed Competitive Suppliers who actively serve, or seek to serve,

municipal aggregations. CPG has already negotiated power supply terms and conditions for municipal aggregations with the following licensed Competitive Suppliers:

- Constellation Energy
- Direct Energy
- Hampshire Power
- NextEra Energy Services
- Public Power
- South Jersey Energy
- Verde Energy USA

### **3.3 APPROVAL OF MUNICIPAL AGGREGATION PLAN**

CPG has strong working relationships with the DOER's Green Communities Division staff and has consulted with them during the development of dozens of other municipal aggregation plans. CPG led each of these communities through the regulatory review process at the DPU, and has maintained compliance of each of these municipal aggregations with the DPU, the DOER and the Massachusetts Office of the Inspector General (OIG). [See **Massachusetts Projects** attachment for a list of DPU dockets filed under CPG's supervision. Each of the plans filed in these proceedings meets or exceeds the statutory standards in M.G.L. c. 164, § 134.]

### **3.4 BROKER SERVICES FOR ELECTRICITY PROCUREMENT**

#### **Develop Supplier RFP**

CPG has experience developing and releasing RFPs for power supply (including energy-related or ancillary services desired). Specifically, CPG has developed and released power supply RFPs for more than 60 communities. Any future RFPs issued by CPG on behalf of the Town shall include, but not be limited to, the specific services and features solicited.

In general, the procurement document shall include several components:

- description of the load aggregation (potential size of the aggregated load and the number of eligible consumers and/or accounts). CPG will obtain this data from the Local Distributor. CPG will also update the data regularly so that customer churn, in the form of move-ins/outs, is accounted for. CPG protects the privacy of each individual consumer in its handling of the data;
- services and features desired by the Town. CPG has unparalleled experience tailoring municipal aggregation programs to the specific needs of its client communities. Every community is different, and CPG can craft power supply proposals and agreements that reflect the needs of the Town;
- qualification criteria required in order to have a bid considered. CPG has relationships with the strongest retail Competitive Suppliers in the Commonwealth. We know the financial health of each Competitive Supplier and their operational capabilities to serve large blocks of residential and commercial customers;
- criteria used to select the Competitive Supplier. CPG analyses bids with an eye toward fulfilling the Town's needs – whether that be the lowest price, the longest

term, the “greenest” supply portfolio, the strongest back office capabilities or any matrix of criteria the Town specifies;

- essential provisions of the standard contract between the chosen Competitive Supplier and the Town on behalf of the participating consumers. CPG has drafted contracts that are weighted in favor of consumers and the Town. For example, CPG has strict provisions about the Competitive Supplier’s use of consumer data; and
- term of service. CPG offers the Town its unique perspective on the market for residents and businesses in municipal aggregations. We work closely with local leaders to create bid structures that enhance consumer choice and local control of energy pricing.

CPG shall ensure when accepting bids from the Competitive Suppliers, that each bidder has included with their response a signed Non-Collusion Form, stating his/her bid is made freely without consultation with any other bidder, and a signed Tax Compliance Form, demonstrating compliance with the Commonwealth of Massachusetts tax laws.

CPG shall assist the Town with the review and analysis of all responsive and responsible bids from the Competitive Suppliers, and shall be responsible for recommending the bid that is in the best interests of its Communities and meets the goals of the Program. Bids from the Competitive Suppliers shall be evaluated based on price, the Competitive Suppliers’ proposed contract terms and conditions, reputation of the Competitive Suppliers, quality of the Competitive Suppliers’ service, extent to which service meets the Town’s needs, the Competitive Suppliers’ past relationship with the Town (if applicable), and previous work experience with governmental agencies.

CPG continually updates its analysis of the corporate health of each prospective bidder, and can readily provide references for Competitive Suppliers who have performed similar services for other communities in Massachusetts and in other states that allow the formation of municipal aggregations.

Any RFP issued by CPG on behalf of the Town shall be reviewed and approved by the Town.

### **Manage Supplier Procurement and Negotiate Supply Contract**

CPG will act as the broker for the Town and will also provide all technical and legal services during the negotiation with prospective Competitive Suppliers and will continue to do so during the term of any contract with the prospective Competitive Suppliers. Our role as the Town’s advocate does not stop once the contract is signed. CPG is available to troubleshoot any contractual issues that arise and has a proven track record of resolving contractual issues in favor of the community and the consumer.

CPG has successfully negotiated energy contracts that use RECs to cover 100% of the load of participating consumers within a client community. Favorable market conditions resulted in significant savings vis-à-vis the utility default rate, even with the inclusion of the additional RECs. For the Town to include a higher proportion of Massachusetts Class-I RECs, CPG would likely turn to its contacts in the market for solar photovoltaic RECs, with the understanding that the Town sits within the WCMA (Western/Central MA) load zone.

Most of the bids we solicit are for “Full Requirements, Load Following” prices. That means that the price must be all-inclusive and final. If so directed by the Town, CPG can require Competitive Suppliers to submit bids that break the “all-in” energy price into its component pieces, to see if additional savings can be obtained through the use of a managed portfolio. All contracts negotiated by CPG have included requirements that billing for the provider be included in the bill from Local Distributors. We welcome the opportunity for the Town to have outside legal counsel review the terms and conditions of any negotiated contract.

A copy of an Electric Service Agreement (ESA) that CPG has negotiated and that has been approved by the DOER and the DPU is available upon request.

### **3.5 MANAGE PROCUREMENTS FOR REPLACEMENT ESA (as needed)**

CPG will manage all subsequent power supply procurements for the Town. CPG’s sole focus is municipal aggregation and the opportunities it affords the Town. Consequently, CPG will continually look for future power supply procurement opportunities that will benefit the Town with respect to its goals for municipal aggregation. The specific nature of the Town’s RFP requirements will dictate the complexity and frequency of any subsequent power supply contracts. Given the Town’s requirement for an increased renewable energy portfolio, as outlined in the RFP, many of the future procurements can be addressed in the initial RFP for power supply.

As part of our additionality procurement program, CPG will work with the Town to custom design a renewable resource RFP that will be issued to all qualified and licensed suppliers of renewable energy resources. This methodology benefits the community in the following ways: (i) creates a transparent, competitive bidding process; (ii) creates a stable price through a long-term energy contract; (iii) creates jobs that benefit the local and/or Massachusetts economy; and (iv) adds new, renewable generation needed to meet the increasing RPS requirements in Massachusetts.

### **3.6 CUSTOMER ENROLLMENT / TRANSITION PROCESS**

After approval of the price and term of the agreement by the Town with a Competitive Supplier, CPG will ensure the transfer of participating consumer data from the Local Distributor to the new Competitive Supplier. CPG has strong working relationships with the staff at the Supplier Services desks at each of the Local Distributors serving Massachusetts. We interface with them daily as part of our service to our clients. CPG has established procedures to respond to:

- Participating Consumer Queries and Issues: Since 2007, CPG has been resolving consumer issues related exclusively to municipal aggregation and answering eligible consumer inquiries.
- Competitive Supplier Issues: CPG has excellent working relationships with all Competitive Suppliers that have expressed interest in serving aggregated municipalities regarding resolutions of participating consumer issues. CPG also tracks the corporate health and bond rating of these Competitive Suppliers.
- Local Distributor Issues: CPG has cooperated with Local Distributors to devise smooth procedures to resolve participating consumer issues. CPG will cooperate with the

Local Distributors to resolve participating consumer issues, should they arise as part of the Program.

- Media Queries: CPG has had experience developing press releases for its current Programs and is well-poised to perform the same services for the Town.
- Governmental Shifts and Proposed Policy Changes: CPG has remained abreast of all governmental issues as they relate to municipal aggregation and can work with the Town in refining its policy on municipal aggregation to reflect any changes in state or federal laws and regulations.

### 3.7 PUBLIC EDUCATION AND NOTIFICATION

CPG will prepare all informational and educational materials (including videos for publication and/or broadcast on local cable TV stations) for the general public and for the media, subject to the approval of the Town, including meetings with representatives from the media. CPG hereby includes a recommended public education and information strategy to be used as part of the Program following commencement of the power supply contract.

Key elements of a successful education and notification campaign include:

1. Media outreach and press kit
2. Information/web links on the homepage of the Town's website
3. Informational flyers and opt-out notices. We have written the notices in conjunction with the DPU's Consumer Division.
4. In-person informational sessions in the Town, timed with the launch of the Program.

CPG will carry out a general education program through the media, the local government, public meetings and presentations, targeted mailings, hand-outs and electronic communications. CPG has formulated specific education and information plans for the Program. Given the purpose of this RFP, the description below explains the information and educational activities related to the Program.

The Program's Education and Information Plan ("Education Plan") focuses on:

- informing eligible consumers about the competitive market and options available;
- easing the transition to a Competitive Supplier under the Program; and
- ensuring that eligible consumers are well aware of their rights to participate or opt-out.

It is specifically designed to meet the information needs of eligible consumers and the legal requirements regarding initial notification, quarterly notifications, and other notifications. CPG has also developed its own website that offers information about the Program and electric industry restructuring and provides links to other related websites. [See **Marlborough's Community Choice Power Supply Program Webpage** provided as an attachment to this submission. This content has been reviewed by the DPU and satisfies all disclosure requirements.]

The timing of the Education Plan will match the phase-in of service. The Education Plan will not begin until just prior to the initiation of service to participating consumers and will be carried out over the term of the phase-in process.

Each specific communication required is discussed below.

### **Required Initial Notification of Service**

CPG and the Competitive Supplier will provide a direct mail advance notice of the initiation of power supply approximately 30 days prior to the start of service date. This notification will be sent to eligible consumers on Basic Service in each rate classification.

As required by law, the notification will:

- inform eligible consumers they have the right to opt-out of the aggregated entity without penalty and choose Basic Service at any time before or after their first day of service;
- prominently state all charges to be made and a comparison of the price and primary terms of the Town's contract compared to the price and terms of the Local Distributor's Basic Service;
- explain the opt-out process; and
- provide written notification that no charges associated with the opt-out will be made by the Competitive Supplier.

The notification will consist of a letter to each eligible Basic Service consumer, an accompanying postcard with a simple signature line to opt-out and a pre-addressed return envelope. The envelope will be addressed for return to the Competitive Supplier and will need to be postmarked at least five days prior to the start of service to guarantee that the eligible consumer's name will be removed from the transition list. A participating consumer wishing to opt-out and return to Basic Service after the transition date will need to call either the Competitive Supplier or the Local Distributor after the start of service. [See sample **Consumer Notification Form** and **Opt-Out Reply Card** provided as an attachment to this submission. The form and content of these materials have been approved by the DPU's Consumer Division and the Local Distributor.]

### **Required Quarterly Notification**

Under 220 C.M.R. 12.06(2)(d), a Competitive Supplier is required to provide quarterly notifications to participating consumers that contain information about "fuel mix, emissions and labor characteristics associated with the Competitive Supplier's company resource portfolio". In a municipal aggregation program, this quarterly notification requirement adds significantly to program postage and mailing costs. The Town and its Competitive Supplier can communicate this required information more effectively through means other than a mail insert. Because the Town comprises a distinct geographic and marketing region, this offers an opportunity to communicate some of the required quarterly notification information with greater visibility than a mail insert. Information on fuel sources, emissions, and labor characteristics can be communicated on a regular basis to participating consumers in the Town via overlapping vehicles to gain maximum penetration of the information. These vehicles include news releases, Public Service Announcements (PSAs), with a repeated message clip for the Town's government channels and other cable stations, announcements at Board of Selectmen meetings (which are also carried on local cable television and covered by news media), public presentations, and electronic communications including posting on the Town's website, CPG's website, and the

Competitive Supplier's website. Through these vehicles, CPG can also explain the relevance of this information for participating consumers.

Given the potential for greater effectiveness of delivery of the information on fuel types, emissions and labor, and the potential for savings through an alternative method of notification, CPG sought and obtained, in D.T.E. 06-102, a waiver of the provisions of 220 C.M.R. 12.06 that would require the Town or its Competitive Supplier to mail this information directly to participating consumers.

Furthermore, CPG states that the purpose of the Education Plan is to raise awareness and provide eligible consumers with information concerning their opportunities, options and rights for participation in the Program.

The Education Plan consists of two parts:

- General Education: This will be conducted through the media, public meetings and presentations, and electronic communications and will inform eligible consumers about the Program.
- Direct Mail Notification: This will be mailed out to eligible consumers and will contain information regarding participation and rights, as well as comparative prices and terms.

The Education Plan also contains a timeline for the Program which includes press releases, public presentations, and public awareness activities regarding opt-out opportunities.

Participating consumers will have unprecedented access to energy professionals, whose sole focus is to offer superior customer service as a resource for the people and businesses of the Town. CPG maintains a website and a toll-free telephone phone number.

### **3.8 REQUIRED FILINGS AND REPORTS**

CPG will prepare and submit, with the approval of the Town, all required filings for the DPU, the DOER, the OIG, or any other state agency, if applicable, as well as all contracts executed by the Town on behalf of its residents under the M.G.L. c. 30B exemption. CPG's depth of experience in the approval stages of the municipal aggregation process, as well as in any required reporting, follow up, or revision of the municipal aggregation plan is unique in Massachusetts. No other consulting firm has filed as many plans, offered as much testimony, or conducted as much research, follow-up, and reporting as CPG.

### **3.9 MANAGEMENT & MONITORING OF MUNICIPAL AGGREGATION PROGRAM**

CPG will administer and provide technical oversight of the Town's Program including:

- monitoring and reporting on compliance with all contract terms and conditions;
- resolution of contract issues;
- transition administration of the opt-out process for participating consumers;
- participation in negotiations with the Competitive Suppliers and the Local Distributor as it relates to procurement for the Program;



- preparation of written reports on the Program as directed; and
- routine updates and attendance at meetings with the Board of Selectmen.

CPG, as the administrator of the power supply contract shall, after a contract is executed between the Town and a Competitive Supplier, ensure the Competitive Supplier's compliance with the contract, conduct ongoing power supply analyses, be the advocate for ratepayers, provide answers to questions from ratepayers, and provide a hotline (866-485-5858 ext. 1, toll-free) and website ([www.colonialpowergroup.com](http://www.colonialpowergroup.com)) where ratepayers can seek information related to the Program. CPG shall provide reports as directed by the Town in addition to any reporting requirements outlined in this RFP.

CPG shall provide a written report concerning the following issues and items to the Town on a quarterly basis:

- Competitive Supplier's compliance with all ESA terms and conditions;
- ESA issues and resolutions, if any;
- Competitive Supplier's ESA milestones met;
- administration/customer service, defaults, litigation and penalties in order to ascertain compliance with DPU regulatory standards and procedures, as well as additional standards and procedures employed by the Competitive Supplier;
- review of participating consumers;
- changes in the financial stability of the Competitive Supplier, if any; and
- changes in organizational structure of the Competitive Supplier, if any.

CPG shall provide a written report concerning the following issues and items to the Town prior to the expiration, extension, or renewal of the ESA:

- assessment on achievement of ESA milestones;
- possible revision or upgrading of goals;
- market assessment or new feasibility study if conditions in the service area or operations have changed significantly;
- public process to affirm goals and evaluation;
- bidding and negotiation process;
- formulation of new ESA; and
- service transition process, if needed.

### **3.10 SUMMARY OF CONSULTANT RESPONSIBILITIES**

CPG shall, if not hereinbefore required, provide the following services:

- obtain and analyze the electrical load data for all participating consumers in the Town;
- provide broker services including preparation of RFPs for the Competitive Suppliers, if necessary;
- prepare and implement a public education plan and participating consumer outreach program;
- design the organizational structure of the Program;
- prepare and submit, with the approval of the Town, all filings with the DPU, the DOER,



- the OIG or any other state agency, if applicable;
- prepare and negotiate agreements with the Competitive Suppliers on terms favorable to the Town;
- solicit bids/proposals from Competitive Suppliers who have already negotiated the provisions of a contract with CPG and the Town or who are willing to provide electrical power under the terms and conditions agreeable to the Town;
- monitor all aspects of the Program and any resulting contractual agreements with the Competitive Suppliers; and
- continually analyze the development of market and regulatory issues, and advise the Town on any proposed changes in law or regulation, including those offered by the DPU, the DOER, ISO-NE and any pending at the FERC which may affect the Program or the Town;
- represent the Town in all issues related to municipal aggregation for the life of the agreement; and
- file any resulting contracts with the DPU, the DOER, the OIG and the other agencies within 15 days of the date of the contract, if applicable, under M.G.L. c. 30B, § 1(b)(32).

### **3.11 TECHNICAL APPROACH FOR IMPLEMENTATION**

CPG was the first municipal aggregator to purchase source specific hydro-electric energy for a municipal aggregation. CPG recently created a “first of its kind” product for 11 communities in Berkshire County. This product could not be delivered to residents prior to a municipal aggregation being created. This process allows for the participating Berkshire County communities to purchase hydroelectric power for their residents and businesses. For reporting purposes, the energy is still part of the system mix in New England. However, the municipal aggregation is able to send energy purchase dollars directly to the owner of the hydroelectric generators, ensuring that the volume of energy purchased from these specific units cannot be sold to anyone else and know that they are supporting the local economy.

CPG has already worked with more than 60 communities to create and manage their municipal aggregation programs. CPG has the procedures and controls in place to scale any number of aggregations in Massachusetts and has a proven track record for implementation. Other companies will say they have the ability to do the same but none have done it. CPG has and does successfully manage dozens of aggregations in Massachusetts.

CPG’s strategy for delivering additionality to the Town is completely flexible and puts the decision in the hands of the Town’s leaders not the development companies and not the brokers for the renewable energy companies. The Town will decide which renewable resources get built and how much. CPG will ensure that there is a transparent system for tracking the additionality created. CPG would like to see municipal aggregation create a paradigm shift in the way renewable resources are developed and utilized in the future. CPG believes municipal aggregation is the conduit for creating a new, clean energy revolution.

CPG will work with the Town to determine which renewable resource(s) it would like to utilize to create additionality and how much of each it would like to incorporate into its municipal aggregation. CPG will then create an RFP for the development of the project. CPG will request that all the attributes produced by the facility be purchased by the municipal aggregation to further drive down costs. This will enable the generating facility to interact with a single off-taker

for their project. Finally, to the extent that the Town chooses to purchase more RECs than their requirement, CPG will ensure that those RECs are retired so no one else can claim them.

## 4 PROPOSED SCHEDULE

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CPG is prepared to undertake and commence the services specified immediately upon execution of a contract between CPG and the Town.

### Implementation Timeline

- |  |                                 |
|--|---------------------------------|
| • Authorization to be a Public Aggregator                | <u>Completed</u> – October 2016 |
| • Development of Aggregation Plan                        | June 2018                       |
| • Public Review of Aggregation Plan                      | July 2018                       |
| • Vote on Aggregation Plan at Board of Selectmen Meeting | July 2018                       |
| • Submission of Aggregation Plan to DOER                 | August 2018                     |
| • Consultation on Aggregation Plan with DOER             | August 2018                     |
| • Submission of Aggregation Plan to DPU                  | September 2018                  |
| • Public Hearing on Aggregation Plan at DPU              | October 2018                    |
| • Approval by DPU  | January 2019                    |
| • RFP for Power Supply                                   | February 2019                   |
| • Selection of Competitive Supplier                      | February 2019                   |
| • Public Education: Ongoing from                         | February 2019                   |
| • Enrollment/Opt-out period [30 days]                    | March 2019                      |
| • Power Supply Commencement                              | April 2019                      |

\*CPG intends to solicit a variety of bids from the Competitive Suppliers regarding term length. Supply contract may be for one to five years, depending on acceptability of all terms and conditions by the Town.

## 5 PROPOSER'S QUALIFICATIONS

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### 5.1 LOCATION

CPG currently maintains an office at 277 Main Street, Marlborough, MA 01752 from which the Town's Program will be managed.

### 5.2 KNOWLEDGE OF M.G.L. c. 164, § 134

CPG has detailed knowledge of M.G.L. c. 164, § 134. CPG previously deployed its knowledge of this statute and its companion regulations in its development and administration of similar programs for each of its cities and towns.

### 5.3 KNOWLEDGE OF ALL ASPECTS OF DPU ORDERS

CPG acted as the chief author and steward of D.T.E. 06-102; D.P.U. 11-27; D.P.U. 11-28; D.P.U. 11-32; D.P.U. 12-39; D.P.U. 12-94; D.P.U. 12-124; D.P.U. 13-136 through 13-145; D.P.U. 14-100; D.P.U. 15-16 through 15-19; D.P.U. 15-60 through 15-63; D.P.U. 15-69; D.P.U. 15-86; D.P.U. 15-90; D.P.U. 15-91; D.P.U. 16-45 through 16-51; D.P.U. 16-56; D.P.U. 16-57; D.P.U. 16-61 through 16-63; D.P.U. 16-71; D.P.U. 16-72; D.P.U. 16-111 through 16-115; D.P.U. 16-141 through 16-143; D.P.U. 16-160; D.P.U. 16-186; D.P.U. 17-06 through 17-08; D.P.U. 17-14 through 17-17; D.P.U. 17-43 through 17-48; and D.P.U. 17-109. CPG implemented all aspects of the DPU's orders in these matters.

For more information, visit: <http://web1.env.state.ma.us/DPU/FileRoom/dockets/bynumber>.

### 5.4 KNOWLEDGE OF LOCAL DISTRIBUTOR TERMS AND CONDITIONS

CPG has detailed knowledge of National Grid's Terms and Conditions for Competitive Suppliers, as found in M.D.P.U. No. 1201.

### 5.5 KNOWLEDGE OF TERMS AND CONDITIONS FOR MUNICIPAL AGGREGATORS

CPG has detailed knowledge of the Terms and Conditions for Municipal Aggregators (M.D.P.U. No. 1202), also found in D.T.E. 06-104. CPG was instrumental in developing key provisions in this document. Sections 1A, 3C(6), and 10 were revised by National Grid following comments made by CPG prior to approval by the Massachusetts Department of Telecommunications and Energy (DTE).

For more information, visit:

<http://web1.env.state.ma.us/DPU/FileRoom/dockets/bynumber>

### 5.6 LEGAL RESOURCES

Since 2006, CPG has had an established professional relationship with James Avery, Esq., a partner in the Energy Practice Group at Pierce Atwood. Pierce Atwood is one of the premier energy law practices in New England. Mr. Avery represented CPG before the DPU in the above-mentioned dockets. CPG engages Pierce Atwood as a subcontractor to perform many of the legal services required in filing the Aggregation Plan and its supporting documents.

### 5.7 ELECTRICITY BROKER'S LICENSE

CPG has the necessary license (originally acquired in 2008) and/or approval required to act as the Town's agent for municipal aggregation to be eligible to submit a proposal (EB-107).

See **Broker's License** provided as an attachment to this submission.

## **5.8 DATA TRANSFER**

Unlike other consultants and brokers, CPG is a participating member of the Massachusetts' utility EBT Working Group and has the ability to handle data transfers (enrollment, etc.) with the Local Distributor using EDI protocol.

## **5.9 OWNERSHIP**

CPG is independently owned. CPG is not a subsidiary of any Competitive Supplier. CPG is unaware of any relationship which may pose a conflict of interest.

## **5.10 LEGAL PROCEEDINGS**

CPG is not, nor has it ever been, involved in any lawsuits and/or legal disputes.

## 6 REFERENCES

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THESE REFERENCES ARE COMMUNITIES FOR WHOM CPG HAS PROVIDED THE SAME SCOPE OF SERVICES THAT ARE REQUESTED IN THIS RFP. THESE COMMUNITIES ALL HAVE AGGREGATION PLANS APPROVED BY THE DPU AND HAVE CONTRACTED WITH A COMPETITIVE SUPPLIER.

See **Massachusetts Projects** and **Total Meters, Usage & Savings** provided as attachments to this submission for a listing of all of CPG's client communities.

### **City of Marlborough**

*(November 2005-Present)*

Address: 140 Main Street, Marlborough, MA 01752

Contact: Beverly Sleeper, Chief Procurement Officer

Phone: (508) 460-3707

Email: [bsleeper@marlborough-ma.gov](mailto:bsleeper@marlborough-ma.gov)

Population: 39,000

Annual kWh Demand Served: 98,000,000

The City of Marlborough's Community Choice Power Supply Program was CPG's "pioneer" aggregation. The City was only the second municipality in Massachusetts to select a Competitive Supplier for its residents and small business customers. The City's Program started with its June 2007 meter reads.

### **Town of Auburn**

*(May 2015-Present)*

Address: 102 Central Street, Auburn, MA 01501

Contact: Julie Jacobson, Town Manager

Phone: (508) 832-7720

Email: [jjacobson@town.auburn.ma.us](mailto:jjacobson@town.auburn.ma.us)

Population: 16,000

Annual kWh Demand Served: 42,000,000

The Town of Auburn's Community Choice Power Supply Program started with its December 2015 meter reads and sought long-term stable rates to protect consumers from market volatility. The Town's first offering provided 100% renewable energy.

### **Town of Lancaster**

*(March 2012-Present)*

Address: 695 Main Street, Lancaster, MA 01523

Contact: Orlando Pacheco, Town Administrator

Phone: (774) 450-5015

Email: [opacheco@lancasterma.net](mailto:opacheco@lancasterma.net)

Population: 8,000

Annual kWh Demand Served: 16,000,000

The Town of Lancaster's Community Choice Power Supply Program started with its December 2012 meter reads and initially sought long-term stable rates and renewable energy resulting in a "first of its" kind product. The Town was able to finance the development of a municipally owned solar array by working with its Competitive Supplier to purchase the RECs produced; thereby meeting RPS requirements and paying the solar project for any excess RECs produced.

**Town of Tyngsborough***(May 2016-Present)*

Address: 25 Bryants Lane, Tyngsborough, MA 01879  
Contact: Matthew Hanson, Town Administrator  
Phone: (978) 649-2300 ext. 109  
Email: [mhanson@tyngsboroughma.gov](mailto:mhanson@tyngsboroughma.gov)  
Population: 12,000  
Annual kWh Demand Served: 32,420,000

The Town of Tyngsborough's Community Choice Power Supply Program started with its November 2017 meter reads and sought continued savings against Basic Service as well as "going green." The Town's current offering provides 100% renewable energy.

**City of Gardner***(June 2016-Present)*

Address: 95 Pleasant Street, Gardner, MA 01440  
Contact: Mark Hawke, Mayor  
Phone: (978) 630-1490  
Email: [mayor@gardner-ma.gov](mailto:mayor@gardner-ma.gov)  
Population: 20,300  
Annual kWh Demand Served: 47,570,000

The City of Gardner's Community Choice Power Supply Program started with its November 2017 meter reads and sought long-term stable rates to protect consumers from market volatility. The City's current offering meets Massachusetts renewable energy requirements.

## 7 KEY PROJECT PERSONNEL

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Key project team members are highlighted below with resumes directly following.

### **MARK CAPPADONA**

Mr. Cappadona will be responsible for leading negotiations with Competitive Suppliers to ensure that the terms and conditions of any contract executed between the Town and a Competitive Supplier meet all applicable statutory and regulatory guidelines. These negotiations will also include advocacy for the end-user in determining rates and RPS requirements. He will also develop and issue the RFP for power supply. Mr. Cappadona will analyze the load profile of the Town in consultation with the Local Distributor. Samples of contracts negotiated by Mr. Cappadona are available upon request.

### **DENISE ALLARD**

Ms. Allard will lead the drafting of all regulatory filings with the DOER and the DPU. She will prepare all documents related to the statutorily-required consultation with the DOER. She will arrange for the assembly of the key documents to be filed with the DPU. Samples of Ms. Allard's filings with the DPU are available on the DPU website at: <http://web1.env.state.ma.us/DPU/FileRoom/dockets/bynumber>.

### **KARIN GRINNELL**

Ms. Grinnell will work closely with the chosen Competitive Supplier to analyze monthly usage and customer data. She maintains CPG's website <http://www.colonialpowergroup.com/>, continuously updating it with DPU required and City-specific information as it becomes available.

### **KAROLYN GOWASKI**

Ms. Gowaski will work with the Local Distributor to obtain and examine customer information for the issuance of Competitive Supplier RFPs and to incorporate into CPG's proprietary CRM (customer relationship management) software system. Ms. Gowaski will interface with the Competitive Supplier and Local Distributor after the contract award, coordinating customer enrollment and managing the opt-out process. She will work closely with CPG's Call Center to resolve any accelerated customer questions or issues.

### **MALISSA LABARRE**

Ms. Labarre will be responsible for all ongoing reporting required by the DPU. Ms. Labarre will provide the Town with savings analysis reporting on a quarterly basis.

### **BERNARD LYNCH**

Mr. Lynch will advise on municipal processes and community outreach. Mr. Lynch's specialties include municipal law and process, community engagement, economic and community development, building high-performing organizations, government relations and advocacy, public finance, social innovation, public policy, strategic analysis and counsel, public-private partnerships, collaborative decision-making, media and public relations, public infrastructure, community sustainability, personnel recruitment, process involvement, and vision articulation.

# MARK CAPPADONA

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## EXPERIENCE

### **Colonial Power Group, Inc., Marlborough, Massachusetts**

**Partner**

**March 2002 – Present**

Pioneer in the Municipal Aggregation Industry. Complex energy contract negotiation and administration. Sales/Marketing of consulting and brokering services. Created first Public/ Private Municipal Aggregation in Massachusetts. Budgeting and financial performance reviews of all programs. Manage new public/private partnership and integrated new program throughout client's organization. Developed relationships with Department of Energy Resources, Department of Public Utilities and Electric Distribution Companies across Massachusetts. Provide strategy development, resource management and information management to clients, including residential, municipal, commercial and industrial customers. Accomplishments: Negotiated over \$1B in power purchase agreements. Commenter on National Grid's Terms and Conditions for Municipal Aggregators

### **BNY Mellon, Westborough, Massachusetts**

**Business Systems Analyst IV**

**December 2000 – 2006**

Evaluated functionality gaps between applications. Worked with and lead teams to define and write business requirements, wrote functional designs. Designed and implemented test scripts for application upgrades and new releases. Supported multiple projects through post-project implementation, including testing.

### **First Data Corporation - Investor Services Group, Boston, Massachusetts**

**Business Systems Analyst**

**June 1998 – December 2000**

Crystal report development and Quality Assurance testing. Project management and documentation: functional specifications, system test plans, business requirements, and user acceptance test plans. Designed and implemented test scripts for application upgrades and new releases. Working knowledge of DCL, VAX, and SQL server environments.

### **Conversion Specialist**

**April 1993 – June 1998**

Member of 'best process' team to analyze improvement areas for productivity and efficiency. Responsible for the implementation and client conversion of new accounting system. Demonstrated teamwork and efficiency skills in high-profile environment. Applied problem-solving/trouble-shooting skills to new system and client environment. Managed development projects from business design to client implementation.

### **Boston Company, Boston, Massachusetts**

**Lead Accountant/Accountant/Manager – Portfolio Accounting**

**January 1991 – April 1993**

Responsible for daily operations of Salomon Brothers mutual funds. Assisted in the effective management of five accountants. Prepared financial statement, treasury, and audit-related packages. Trained and developed new employees. Researched and analyzed markets conditions and movements for portfolio impact. Designed quality control measures to produce an error-free environment.

## EDUCATION

### **American International College, Springfield, Massachusetts**

**B.S. in Finance**

**May 1990**



## DENISE L. ALLARD

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### EXPERIENCE

**Colonial Power Group, Inc., Marlborough, Massachusetts**  
***Vice President of Operations***

**May 2014 – Present**

Research, coordinate, and implement all functions for development of Community Choice Aggregation Programs. Essential duties include secure new customers, develop aggregation plans, manage approval processes, issue RFPs to competitive suppliers and provide customer service.

**BNY Mellon, Westborough, Massachusetts**  
***Project Manager / Business Applications Consultant***

**July 2010 – April 2014**

Managed large scale, global initiatives with multiple work streams and vendor build components in addition to medium/small scale system integrations, automations and upgrade projects. Drove integration initiatives. Oversaw build out of automated interfaces for key, high profile clients. Facilitated the definition of project scope, goals and deliverables. Defined project tasks and other requirements. Developed full scale project plans in conjunction with work stream leads. Coordinated project work streams and held leads accountable for goals. Ensured quality assurance. Planned and scheduled project timelines. Monitored and reported on project progress to all stakeholders. Implemented and managed project changes to achieve project outputs.

**PNC Global Investment Servicing, Westborough, Massachusetts**  
***Business Systems Analyst***

**March 2003 – June 2010**

Developed, tested and implemented global client interfaces. Expedited development and approval of business requirements. Created functional specifications documents. Formulated and defined systems scope and objectives based on applicable business systems. Reviewed technical specifications. Participated in project testing and implementation. Communicated project status and viability of functionality changes and made recommendations to line of business, clients and service partners. Performed business analysis activities and made recommendations about business and technical strategies that solved a business problem or resulted in the implementation of a new process.

***Senior Fund Accounting & Administration Supervisor***

**March 2001 – February 2003**

Oversaw compliance monitoring function, financial reporting process, monthly expense/payable analysis function and quarterly income and capital gain distribution function. Managed and monitored IRS, SEC and portfolio compliance. Prepared, reviewed and distributed portfolio of investments, financial statements and footnotes in compliance with SEC and GAAP regulations. Reviewed monthly expense pro formas and estimated liabilities. Prepared annual budgets for client, researched quarterly income and capital gain distributions and coordinated quarterly completion of Board reporting materials.

***Senior Compliance Analyst***

**January 1998 – February 2001**

Monitored funds for compliance with IRS, SEC (Investment Company Act of 1940), and prospectus requirements. Analyzed prospectuses and SAI's for the development of compliance reports. Developed and maintained a working knowledge of all applicable laws, regulations, and interpretations governing the administration of mutual funds, specifically the Investment Company Act of 1940, the Internal Revenue Code and securities laws.

***Senior Fund Accountant***

**April 1996 – December 1997**

Calculated fund's daily net asset value, net income and yield. Reported figures to NASDAQ and Transfer Agent. Identified exceptions and problems affecting accounting records and prices. Communicated issues to management and assisted in resolution. Assisted in preparing semi-annual audit schedules and financial statements as well as quarterly trustee reports.

### EDUCATION

**Clark University, Worcester, Massachusetts**  
***B.A. in Economics and Business Management***

**May 1995**

# KARIN GRINNELL

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## EXPERIENCE

**Colonial Power Group, Inc., Marlborough, Massachusetts**  
***Vice President of Finance***

**April 2008-Present**

Manage all areas of company finances including: budgeting, forecasting, analysis, reconciliations, payroll, accounts payable, accounts receivable, general ledger, billing, cash flow analysis/projections, and audit & tax preparation. Consolidate and publish all municipal aggregation quarterly reporting to communities and state agencies. Prepare all municipal aggregation documents and contracts. Develop and manage project database. Design and maintain company website.

**Marlborough, Massachusetts**  
***Homemaker/Volunteer***

**July 1997-April 2008**

**Stratus Computer, Marlborough, Massachusetts**  
***Financial Analyst***

**August 1994-July 1997**

Managed all Worldwide Professional Services' project finances, including budgeting, forecasting and analysis. Assisted Professional and Technical Services business managers with financial aspects of bids, contract terms and conditions. Provided total business support to North America, Canada, S. Africa, Latin America and Mexico Sales Organizations, \$139M annual revenue, \$28M annual expense budget. Responsibilities included: budgeting, forecasting, analysis, annual business plan preparation, monitoring fee and royalty payments and agreements, ensuring accurate and timely commission payments. Consolidated and published all Worldwide Sales financial reporting. Supported Worldwide Sales Controller.

***Associate Financial Analyst***

**June 1992-July 1994**

Provided financial support for Telecom Business Unit. Monitored expense budget of \$17 million. Forecasted expenses, capital and headcount monthly. Managed fixed assets and loaned equipment. Reconciled budget versus actual variances. Interacted with Regional Directors and District Managers on business issues. Prepared quarterly Finance and Operations reporting package and annual business plan. Member of Total Quality Management Team responsible for cost reduction of \$16 million annual T&E expense. Assisted in the set-up of the Telecom Development Center in Vienna, VA. Ensured accurate project and capitalization/amortization accounting for its development and ongoing SINAP development.

***Corporate Accountant***

**September 1990-May 1992**

Monitored and maintained the General Ledger system. Analyzed all balance sheet accounts monthly. Reconciled all company bank accounts. Responsible for over 300 Lease Schedules. Tracked purchased software expenses. Interacted with the product managers to monitor the development status of the purchased software products. Prepared the FASB 86 capitalization software entry and analysis. Produced and maintained Budget v. Actual and Management Reports structure on the newly implemented ISI system.

## EDUCATION

**Providence College, Providence, Rhode Island**  
***B.A. in Economics***

**May 1990**

## PROFESSIONAL SKILLS

Proficient in Microsoft Office Suite (Word, Excel, Outlook, PowerPoint), QuickBooks

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## EXPERIENCE

### Colonial Power Group, Inc., Marlborough, Massachusetts

#### *Retail Manager*

August 2016-Present

- Manage the retail end of the company
- Work with local distributors to obtain and examine customer information for the issuance of Competitive Supplier RFPs
- Work with suppliers to ensure all program rates and customer accounts are updated accordingly
- Manage program notification mailings and enrollment process
- Responsible for responding to customer questions, enrollments, cancellation, complaints, errors, and troubleshoot any account issues with the utility
- Prepare cost comparison, usage statistics and other ad hoc reporting on operating results and forecasts
- Manage internal databases to improve reporting and interface with EDI systems to correspond with the utilities

### Stratus Technologies, Maynard, Massachusetts 01754

#### *Manager of FP&A*

2014-August 2016

- Lead corporate budgeting and forecasting process
- Developed streamlined financial models for executive management and sensitivity analyses
- Developed dashboard-style financial reporting for individual and consolidated business units
- Monitored and analyzed WW monthly operating results against budget, forecast and prior years  
Separated exchange rate variances from true budget variances
- Finance support for all organizations. Responsibilities included annual budgeting, forecasting, analysis, requisition/headcount approval, and ad-hoc modeling
- Finance member on multiple corporate teams tasked with developing the company's business strategy and IT infrastructure
- Finance lead of conversion of WW revenue, for currency exchange analysis and forecasting.  
This required consolidation of all customer revenue, over a 10 year period, at the customer invoice level, in local currency.
- Responsible for maintaining integrity of Oracle Financials, and built cross-validation rules to support reporting structure
- Worked with consultants on acquisition valuation and purchase price accounting
- Supervised one direct report

#### *Accounting Manager*

2009-2014

- Streamlined and maintained inception to date worldwide revenue database, which increased efficiency on revenue analysis, and improved integrity of information
- Responsible for intercompany elimination accounting for product revenue, cost, and inventory
- Executed month end close process, including preparation of month end accrual entries, reclass entries, and balance sheet reconciliations.
- Supported Worldwide Sales, Marketing and Channels Operations with detailed reporting and analysis in expenses (~\$50M budget), headcount, capital and revenue. Worked closely with VP's to assess projected needs of departments based on growth projections
- Created, prepared and processed monthly commission statements for US based sales team and SVPs
- Developed numerous forecasting models to examine company's projected short- and long-term growth based on key indicators, sales projections, cash flow analysis, valuation, assets, liabilities, and credit risks

#### *Senior Financial Analyst*

2003-2009

- Supported Worldwide Admin, Facilities, and CS organizations
- Prepared Worldwide AR metrics, showing aging of AR by country, and by customer. Monitored AR reserve balances and prepared entries needed to maintain coverage based on Auditor requirements
- Oversaw and calculated company's revenue, elimination, and warranty reserve entries when company restated 5 years of financial information to be in accordance with GAAP

## KAROLYN GOWASKI (continued)

### **Manager, Intl Sales Finance**

**2000-2001**

- Established financial structure for the International Subsidiaries to achieve financial support and control objectives
- Lead role in consolidating International revenue, product revenue backlog numbers, revenue splits, and compensation issues
- Monitored monthly department expenses, revenue, variance analysis and provided exception reporting

### **Senior Financial Analyst**

**1997-2000**

- Responsible for revenue, expenses, and gross margin analysis for Latin America, Canada, and European Sales subsidiaries
- Developed international expense budgets based on individual subsidiary business and revenue forecasts. Controlled spending, and analyzed variances from budget and currency exchange rate fluctuations
- Produced quarterly contribution statements, commission statements, headcount schedules, and various revenue trends

### **Cost/Financial Analyst**

**1994-1997**

- Created and monitored a \$45M expense budget model for Worldwide Manufacturing and Logistics
- Developed financial models in support of new product cost development and volume manufacturing. Types of models included make vs. buy, cost reduction, and cost/benefit.
- Actively participated as the Finance Program Leader on cross-functional new product teams.
- Reconciled all component and subcontracted raw material purchases totaling over \$150 million. Ensured inventory accuracy, analyzed work order variances, and maintained standard cost system
- Coordinated and performed off-site supplier inventory audits

### **Corporate Accountant**

**1992-1994**

- Monitored and maintained the General Ledger system
- Analyzed all balance sheet accounts monthly
- Reconciled all company bank accounts
- Prepared and recorded month end journal entries and accruals, in accordance with GAAP

### **EDUCATION**

**May 1992**

**University of Massachusetts, Amherst, Massachusetts**

School of Management

*Bachelor of Science Degree, Accounting*

### **PROFESSIONAL SKILLS**

Proficient in Microsoft Office, Excel, PowerPoint, Oracle Financial systems, Salesforce, PeopleSoft, Ultimate Software, Business Objects, Datamart, and ADI

### **AWARDS**

2016 Presidents Award for results, Stratus Technologies, Inc.

# MALISSA A. LABARRE

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## EXPERIENCE

### Colonial Power Group, Inc., Marlborough, Massachusetts

#### *Reporting Analyst*

January 2016-Present

- Prepare the annual reporting necessary for the Department of Public Utilities
- Consolidate the community aggregation details and provide information back to the community leaders
- Assist in the maintenance of the company website

### Marlborough, Massachusetts

#### *Substitute Teacher/Volunteer*

November 2007-January 2016

### Stratus Computer, Marlborough, Massachusetts

#### *Senior Financial Analyst*

May 2004-November 2007

- Developed annual business plan for worldwide customer service division of company
- Managed quarterly expense, capital, and headcount forecasts for multiple operating divisions worldwide
- Responsible for monthly analysis of financials
- Variance reporting on actual vs budget to senior executive team

#### *Financial Analyst*

July 1999-May 2004

- Supported monthly close process
- Prepared financial schedules for quarterly and annual audits
- Calculated quarterly commissions

### Arch Communications Group, Inc., Westborough, Massachusetts

#### *Internal Auditor*

March 1998-June 1999

- Performed field site visits to ensure proper controls were in place to best support the company
- Researched operational issues nationwide
- Coordinated special projects to improve inefficiencies

#### *Regional Accountant*

November 1996-March 1998

- Performed monthly close and analysis of financial statements
- Reconciled balance sheet accounts

### Swan Technologies, Marlborough, Massachusetts

#### *Accounting Analyst*

November 1995-November 1996

- Assisted with monthly close process
- Forecasted weekly cash collections and reconciled bank activity

### Chase Global Fund Services, Boston, Massachusetts

#### *Mutual Fund Accountant*

June 1994-November 1995

- Calculated the daily net asset value of a mutual fund
- Researched stock price fluctuations

## EDUCATION

### Bentley College, Waltham, Massachusetts

May 1994

#### *B.S. in Accountancy, Minor in Business Law*

## PROFESSIONAL SKILLS

Proficient in Microsoft Office Suite (Word, Excel, Outlook, PowerPoint)

## **Bernard Lynch, Principal**

### **Community Paradigm Associates, LLC**

Bernard Lynch is a management professional with more than 30 years of experience in working with, and working for, municipal governments. In 2014, he established a multi-faceted public policy consulting organization, Community Paradigm Associates, which provides services to businesses, nonprofits, and local governments.

Mr. Lynch's specialties include municipal law and process, community engagement, economic and community development, building high-performing organizations, government relations and advocacy, public finance, social innovation, public policy, strategic analysis and counsel, public-private partnerships, collaborative decision-making, media and public relations, public infrastructure, community sustainability, personnel recruitment, process improvement, and vision articulation.

A selected list of Community Paradigm Associates' clients include Digital Federal Credit Union; the communities of Chelsea, Winchendon, Shrewsbury, Leicester, Wellesley, Provincetown, and Longmeadow; Axuda, a nonprofit micro-lending organization; Colonial Power Group; the Massachusetts Fire Academy; and Sustainable Strategies 2050 LLC.

During his public management career, Mr. Lynch served as City Manager of Lowell, Mass., for nearly eight years, and Town Manager of Chelmsford, Mass., for 20 years. His efforts were geared towards strategic decision-making, innovative problem solving, and building high-performing organizations. The results were enhanced efficiency of operations, strong finances, broad-based economic development, substantial capital investments, and enriched citizen engagement.

Mr. Lynch has served as an Adjunct member of the UMass-Lowell Political Science Department since 1981 teaching an array of courses but focused primarily on public administration, public finance, public policy, urban issues, and local government. In 2014, Mr. Lynch joined the graduate school at Suffolk University's Moakley Center for Public Management as an Adjunct Professor teaching courses on community engagement, state and local finance, and public administration and is now a Senior Fellow there. Additionally, Mr. Lynch has presented and spoken to business groups, professional organizations, and as a guest lecturer at a number of academic institutions.

Having earned a Bachelor of Science degree in Political Science from the University of Lowell and a Master's degree in Public Administration from the University of Massachusetts at Amherst, Mr. Lynch has also sought out various opportunities to expand his knowledge both academically and professionally. Additionally, in 2006, he earned credentialed manager status from the International City Management Association.

## **Bernard Lynch (continued)**

Mr. Lynch is a member, or past member, of numerous professional and community service organizations. He has been a founding member and/or played a key leadership role in many of these groups. These organizations include:

- International City Management Association (1989-Present)
- Massachusetts Municipal Management Association (1986-Present)
- Massachusetts Municipal Association-Fiscal Policy Committee-Past Chairman (1994-Present)
- Innovation Academy Charter School Board of Trustees (2014-Present)
- Lowell General Hospital Board of Incorporators (2012-Present)
- Massachusetts Municipal Association Revenue Sharing Task Force (2005-Present)
- Middlesex 3 Coalition Board of Directors-Founding Member (2010-2014)
- Lowell Plan Board of Directors (2006-2014)
- Lowell Development and Finance Corporation Board of Directors (2006-2014)
- Merrimack Valley Economic Development Council-Board of Directors (2000-2014)
- Massachusetts Municipal Association-Board of Directors (2007-2009)
- Massachusetts Local Government Advisory Commission (2007-2009)
- Massachusetts Inter-Local Insurance Association – Director and member of Audit Committee and Investment Committee (1993-2006)
- Northern Middlesex Council of Governments (1987-2006)
- Massachusetts Municipal Association Task Force on State & Local Finance, Service Delivery & Administrative Reform (2004)
- Lowell Community Health Center-Board of Directors (1999-2000)
- Special Legislative Commission on Affordable Housing (1988-1989)

## Respondent Information Form



## TOWN OF HARVARD – RFP for Broker Services for Electricity Procurement

### Contractor Authorized Signature Verification Form

#### Corporations

1. **Authorization.** Attach a copy of a board of directors corporate resolution that each signatory is authorized to execute contracts and other documents and legally bind the corporation, **AND**
2. **Notarization.** Attach a notarized copy of each signatory's signature.

#### Partnership, Joint Venture or other non-corporate Entities

1. **Authorization.** Attach documentation for each signatory of authorization to execute contracts and other documents and legally bind the partnership or other non-corporate entity, **AND**
2. **Notarization.** Attach a notarized copy of each signatory's signature.

#### Individual/Proprietorship

1. **Official Sample of Signature.** Attach a copy of a driver's license, social security card or other acceptable official form or identification containing the authorized signatory's signature, **AND**
2. **Notarization.** Attach a notarized copy of each signatory's signature.

---

#### THIS SECTION MAY BE USED FOR NOTARIZATION

---

**SIGNATURE: (as it will appear on documents)**

MARK CAPPADONA

---

**PRINTED NAME:**

PRESIDENT

---

**PRINTED TITLE:**

---

**DATE:**

On this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me, the undersigned notary public, personally appeared \_\_\_\_\_ (name of document signer), proved to me through satisfactory evidence of identification, which were \_\_\_\_\_, to be the person whose name is signed on the preceding or attached document in my presence.

---

\_\_\_\_\_(official signature and seal of notary)

## TOWN OF HARVARD – RFP for Broker Services for Electricity Procurement

### Certificate of Non-Collusion

The undersigned certifies, under penalties of perjury, that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word “person” shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity, or group of individuals.

COLONIAL POWER GROUP, INC.

\_\_\_\_\_  
(Name of Respondent)

277 MAIN STREET, MARLBOROUGH, MA 01752

\_\_\_\_\_  
(Address of Respondent)

(508) 485-5858

\_\_\_\_\_  
(Telephone Number)

**By:** \_\_\_\_\_

(Signature)

MARK CAPPADONA

\_\_\_\_\_  
(Printed Name)

PRESIDENT

\_\_\_\_\_  
(Printed Title)

\_\_\_\_\_  
(DATE)

## TOWN OF HARVARD – RFP for Broker Services for Electricity Procurement

### Certificate of Tax Compliance

Pursuant to Massachusetts General Laws (M.G.L) c. 62C, § 49A, I certify under the penalties of perjury that the Respondent named below has complied with all laws of the Commonwealth of Massachusetts pertaining to the payment of taxes, to the reporting of employees and contractors, and to the withholding and remitting of child support.

COLONIAL POWER GROUP, INC.

\_\_\_\_\_  
(Name of Respondent)

277 MAIN STREET, MARLBOROUGH, MA 01752

\_\_\_\_\_  
(Address of Respondent)

(508) 485-5858

\_\_\_\_\_  
(Telephone Number)

**By:** \_\_\_\_\_

(Signature)

MARK CAPPADONA

\_\_\_\_\_  
(Printed Name)

PRESIDENT

\_\_\_\_\_  
(Printed Title)

\_\_\_\_\_  
(DATE)

## TOWN OF HARVARD – RFP for Broker Services for Electricity Procurement

### Affirmative Action Plan Form

IN WITNESS WHEREOF, the undersigned certifies that, under the pains and penalties of perjury, pursuant to Executive Orders 227 and 246, as an employer it is committed to non-discrimination in employment and if awarded this contract shall also be committed to procure commodities, services and supplies from certified minority and women-owned business enterprises, businesses owned by individuals with disabilities and businesses owned and controlled by socially or economically disadvantaged individuals, both in the performance of contracts with the Commonwealth of Massachusetts and in the performance of its business generally.

COLONIAL POWER GROUP, INC.

\_\_\_\_\_  
(Name of Respondent)

277 MAIN STREET, MARLBOROUGH, MA 01752

\_\_\_\_\_  
(Address of Respondent)

(508) 485-5858

\_\_\_\_\_  
(Telephone Number)

**By:** \_\_\_\_\_

(Signature)

MARK CAPPADONA

\_\_\_\_\_  
(Printed Name)

PRESIDENT

\_\_\_\_\_  
(Printed Title)

\_\_\_\_\_  
(DATE)

## TOWN OF HARVARD – RFP for Broker Services for Electricity Procurement

### Conflict of Interest Certification

The Respondent hereby certifies that:

1. The Respondent has not given, offered, or agreed to give any gift, contribution, or offer of employment as an inducement for, or in connection with, the award of a Contract pursuant to this RFP.
2. No consultant to, or subcontractor for, the Respondent has given, offered, or agreed to give any gift, contribution, or offer of employment to the Respondent, or to any other person, corporation, or entity as an inducement for, or in connection with, the award to the consultant or subcontractor of a Contract by the Respondent.
3. No person, corporation, or other entity, other than a bona fide full time employee of the Respondent has been retained or hired to solicit for or in any way assist the Respondent in obtaining a Contract pursuant to this RFP upon an agreement or understanding that such person, corporation or entity be paid a fee or other compensation contingent upon the award of a Contract to the Respondent.
4. Respondent understands that the Massachusetts Conflict of Interest Law, Chapter 268A of the Massachusetts General Laws (M.G.L.), applies to the Respondent and its officers, employees, agents, subcontractors, and affiliated entities with respect to the transaction outlined in the Request for Proposals.
5. Respondent understands that the Respondent and its officers, employees, agents, subcontractors, and affiliated entities, shall not participate in any activity which constitutes a violation of the Massachusetts Conflict of Interest Law or which creates an appearance of a violation of the Massachusetts Conflict of Interest Law.

COLONIAL POWER GROUP, INC.

\_\_\_\_\_  
(Name of Respondent)

277 MAIN STREET, MARLBOROUGH, MA 01752

\_\_\_\_\_  
(Address of Respondent)

(508) 485-5858

\_\_\_\_\_  
(Telephone Number)

By: \_\_\_\_\_  
(Signature)

MARK CAPPADONA

\_\_\_\_\_  
(Printed Name)

PRESIDENT

\_\_\_\_\_  
(Printed Title)

\_\_\_\_\_  
(DATE)

## TOWN OF HARVARD – RFP for Broker Services for Electricity Procurement

### Certificate of Compliance with MGL c. 151B

The Respondent hereby certifies that it is in compliance with and shall remain in compliance with Massachusetts General Laws (M.G.L.) Chapter 151B and shall not discriminate on any prohibited basis outlined therein. The Respondent also hereby certifies that it shall comply with any and all applicable State Office of Minority and Women Business Enterprise Assistance (SOMWBA) thresholds that have been established in conjunction with this Request for Proposals.

COLONIAL POWER GROUP, INC.

\_\_\_\_\_  
(Name of Respondent)

277 MAIN STREET, MARLBOROUGH, MA 01752

\_\_\_\_\_  
(Address of Respondent)

508 485 5858

\_\_\_\_\_  
(Telephone Number)

**By:** \_\_\_\_\_  
(Signature)

MARK CAPPADONA

\_\_\_\_\_  
(Printed Name)

PRESIDENT

\_\_\_\_\_  
(Printed Title)

\_\_\_\_\_  
(DATE)

## TOWN OF HARVARD – RFP for Broker Services for Electricity Procurement

### Certificate of Non-Debarment

The Respondent hereby certifies that it is presently not debarred, suspended, or otherwise prohibited from practice by any federal, state, or local agency, and that, should any proceeding arise in which it is debarred, suspended, or otherwise prohibited from practice by any federal, state, or local agency, the Respondent shall inform the Town of Harvard and involved municipality within one (1) business day of such debarment, suspension, or prohibition from practice.

COLONIAL POWER GROUP, INC

\_\_\_\_\_  
(Name of Respondent)

277 MAIN STREET, MARLBOROUGH, MA 01752

\_\_\_\_\_  
(Address of Respondent)

(508) 485-5858

\_\_\_\_\_  
(Telephone Number)

**By:** \_\_\_\_\_  
(Signature)

MARK CAPPADONA

\_\_\_\_\_  
(Printed Name)

PRESIDENT

\_\_\_\_\_  
(Printed Title)

\_\_\_\_\_  
(DATE)

# MASSACHUSETTS PROJECTS

Town/City	Utility	Load Zone	Docket Number	Approval Date	Population	Contact Name	Contact Phone	Standard/Opt -In Green
BERKSHIRE COUNTY								
ADAMS	NGRID	WCMA	D.P.U. 15-69	12/29/2015	8,332	Donna Cesan	(413) 743-8300 ext. 170	Standard Product 100% National Wind REC's
CHESHIRE	NGRID	WCMA	D.P.U. 15-91	12/30/2015	3,192	Mark Webber	(413) 743-1690 ext. 18	Standard Product 100% National Wind REC's
CLARKSBURG	NGRID	WCMA	D.P.U. 13-145	7/2/2014	1,697	Carl McKinney	(413) 663-8250	Standard Product 100% National Wind REC's
DALTON	WMECO	WCMA	D.P.U. 13-136	7/2/2014	6,725	Kenneth Walto	(413) 684-6111 ext. 12	Standard Product 100% National Wind REC's
EGREMONT	NGRID	WCMA	D.P.U. 16-48	9/7/2016	1,224	Mary Brazie	(413) 528-0182 ext. 10	Standard Product 100% National Wind REC's
FLORIDA	NGRID	WCMA	D.P.U. 13-137	7/2/2014	744	Christine Dobbert	(413) 662-2448	Standard Product 100% National Wind REC's
GREAT BARRINGTON	NGRID	WCMA	D.P.U. 16-186	7/31/2017	6,996	Jennifer Tabakin	(413) 528-1619 ext. 2	Standard Product 100% National Wind REC's
LANESBOROUGH	WMECO	WCMA	D.P.U. 11-27	11/30/2011	3,037	Paul Sieloff	(413) 442-1167 ext. 21	Standard Product 100% National Wind REC's
LENOX	NGRID / WMECO	WCMA	D.P.U. 13-138	7/2/2014	4,983	Christopher Ketchen	(413) 637-5500 ext. 7	Standard Product 100% National Wind REC's
MONTEREY	NGRID	WCMA	D.P.U. 15-18	9/17/2015	957	Melissa Noe	(413) 528-1443 ext. 111	Standard Product 100% National Wind REC's
NEW ASHFORD	WMECO	WCMA	D.P.U. 17-46	10/18/2017	226	Jason Jayko	(413) 458-2720	Standard Energy Product
NEW MARLBOROUGH	NGRID	WCMA	D.P.U. 13-139	7/2/2014	1,497	Mari Enoch	(413) 229-8116	Standard Product 100% National Wind REC's
NORTH ADAMS	NGRID	WCMA	D.P.U. 13-140	7/2/2014	13,533	Michael Canales	(413) 672-0011	Standard Product 100% National Wind REC's
PITTSFIELD	WMECO	WCMA	D.P.U. 16-63	11/14/2016	44,057	James McGrath	(413) 499-9344	Standard Product 25% More SREC II's
SANDISFIELD	WMECO	WCMA	D.P.U. 16-50	9/14/2016	920	Fred Ventresco	(413) 258-4711 ext. 1	Standard Energy Product
SHEFFIELD	NGRID	WCMA	D.P.U. 13-141	7/2/2014	3,225	Rhonda LaBombard	(413) 229-7000 ext. 152	Standard Product 100% National Wind REC's
WEST STOCKBRIDGE	NGRID	WCMA	D.P.U. 13-143	7/2/2014	1,288	Mark Webber	(413) 232-0300 ext. 319	Standard Product 100% National Wind REC's
WILLIAMSTOWN	NGRID	WCMA	D.P.U. 13-144	7/2/2014	7,599	Jason Hoch	(413) 458-3500	Standard Product 100% National Wind REC's
BRISTOL COUNTY								
EASTON	NGRID	SEMA	D.P.U. 17-109	2/20/2018	23,112	Connor Read	(508) 230-0510	No Power Flow
ESSEX COUNTY								
HAVERHILL	NGRID	NEMA	D.P.U. 15-61	9/17/2015	3,282	James Fiorentini	(978) 374-2300	No Power Flow
METHUEN	NGRID	NEMA / WCMA	D.P.U. 15-60	12/30/2015	48,514	William Buckley	(978) 983-8565	No Power Flow
NEWBURYPORT	NGRID	NEMA	D.P.U. 15-62	12/30/2015	17,800	Molly Ettenborough	(978) 499-0413	No Power Flow
NORTH ANDOVER	NGRID	NEMA / WCMA	D.P.U. 17-15	8/25/2017	29,217	Andrew Maylor	(978) 688-9510	No Power Flow
SALISBURY	NGRID	NEMA	D.P.U. 16-51	9/14/2016	8,580	Neil Harrington	(978) 462-8232 ext. 101	No Power Flow
FRANKLIN COUNTY								
BERNARDSTON	WMECO	WCMA	D.P.U. 16-47	9/7/2016	2,123	Hugh Campbell	(413) 648-5401	Standard Energy Product
HEATH	NGRID	WCMA	D.P.U. 16-62	11/14/2016	703	Kara Leistyna	(413) 337-4934 ext. 0	Standard Energy Product
LEVERETT	WMECO	WCMA	D.P.U. 17-06	7/21/2017	1,861	Marjorie McGinnis	(413) 548-9699	No Power Flow
ORANGE	NGRID	WCMA	D.P.U. 17-14	8/25/2017	7,756	Gabriele Voelker	(978) 544-1100 ext. 103	Standard Product 100% National Wind REC's
WENDELL	NGRID	WCMA	D.P.U. 16-49	9/14/2016	868	Nancy Aldrich	(978) 544-3395	Standard Product 100% National Wind REC's
HAMPDEN COUNTY								
WEST SPRINGFIELD	WMECO	WCMA	D.P.U. 16-160	7/31/2017	28,684	Scott Moore	(413) 495-1838	No Power Flow
HAMPSHIRE COUNTY								
HATFIELD	WMECO	WCMA	D.P.U. 16-111	4/28/2017	3,282	Marlene Michonski	(413) 247-0481	No Power Flow
PELHAM	WMECO	WCMA	D.P.U. 16-56	9/27/2016	1,319	Susannah Carey	(413) 253-7129	No Power Flow



# MASSACHUSETTS PROJECTS

Town/City	Utility	Load Zone	Docket Number	Approval Date	Population	Contact Name	Contact Phone	Standard/Opt -In Green
WILLIAMSBURG	NGRID	WCMA	D.P.U. 16-143	7/31/2017	2,466	Charlene Nardi	(413) 268-8418	Standard Product 100% National Wind REC's
MIDDLESEX COUNTY								
ASHBY	UNITIL	WCMA	D.P.U. 12-94	5/5/2014	3,161	Bob Hanson	(978) 386-2424 ext. 25	Standard Energy Product
ASHLAND	NSTAR	NEMA	D.P.U. 11-28	11/30/2011	17,150	Michael Herbert	(508) 881-0100 ext. 7911	Standard Energy Product
			D.P.U. 15-86	12/29/2015				
BILLERICA	NGRID	WCMA	D.P.U. 17-44	10/18/2017	41,888	John Curran	(978) 671- 0942	Opt-In 100% National Wind REC's
BURLINGTON	NSTAR	NEMA	D.P.U. 15-16	9/17/2015	25,463	John Petrin	(781) 270-1635	Standard Energy Product
CARLISLE	NSTAR	NEMA	D.P.U. 17-07	7/21/2017	5,028	Timothy Goddard	(978) 371- 6688	No Power Flow
HOLLISTON	NSTAR	SEMA / NEMA	D.P.U. 15-17	9/17/2015	14,162	Jeff Ritter	(508) 429-0608	Standard Energy Product
LOWELL	NGRID	WCMA	D.P.U. 12-124	11/27/2013	109,861	Phil Ferreira	(978) 674-1410	Standard Product 100% NE Hydro REC's
			D.P.U. 14-100	4/15/2015				
MARLBOROUGH	NGRID	WCMA	D.P.U. 06-102	3/14/2007	39,414	Beverly Sleeper	(508) 460-3774 ext. 3707	Standard Energy Product
TEWKSBURY	NGRID	WCMA / NEMA	D.P.U. 15-90	12/29/2015	30,107	Richard Montuori	(978) 640-4300	Standard Energy Product
TYNGSBOROUGH	NGRID	WCMA	D.P.U. 16-112	4/28/2017	12,054	Matthew Hanson	(978) 649-2300 ext. 100	Standard Product 100% National Wind REC's
NORFOLK COUNTY								
FRANKLIN	NGRID	SEMA	D.P.U. 16-57	9/27/2016	32,581	Jamie Hellen	(508) 520-4949	No Power Flow
MEDWAY	NSTAR	SEMA	D.P.U. 17-48	10/18/2017	13,053	Allison Potter	(508) 533-3200	Standard Product 100% National Wind REC's
STOUGHTON	NGRID	SEMA	D.P.U. 17-43	10/18/2017	28,106	Pam McCarthy	(781) 341-1300 ext. 9265	Opt-In 100% National Wind REC's
PLYMOUTH COUNTY								
ABINGTON	NGRID	SEMA	D.P.U. 17-08	7/21/2017	16,124	Richard LaFond	(781) 982-2100	Standard Product 100% National Wind REC's
HALIFAX	NGRID	SEMA	D.P.U. 16-142	4/28/2017	7,606	Charlie Seelig	(781) 294-1316	Standard Energy Product
KINGSTON	NSTAR	SEMA	D.P.U. 16-115	4/28/2017	12,819	Thomas Bott	(781) 585-0549	Standard Energy Product
PEMBROKE	NGRID / NSTAR	SEMA	D.P.U. 16-141	4/28/2017	18,097	Edwin Thorne	(781) 293-3844	No Power Flow
PLYMOUTH	NSTAR	SEMA	D.P.U. 16-114	4/28/2017	57,826	Patrick Farah	(508) 747-1620 ext. 10204	Standard Energy Product
PLYMPTON	NSTAR	SEMA	D.P.U. 17-17	8/25/2017	2,859	Mark Russo	(781) 585-2700	Opt-In 100% National Wind REC's
WEST BRIDGEWATER	NGRID	SEMA	D.P.U. 17-16	8/25/2017	6,983	David Gagne	(508) 894-1267	Standard Product 100% National Wind REC's
WORCESTER COUNTY								
AUBURN	NGRID	WCMA	D.P.U. 15-63	9/17/2015	16,315	Julie Jacobson	(508) 832-7720	Standard Energy Product
BERLIN	NGRID	WCMA	D.P.U. 16-45	9/7/2016	2,942	Mary Arata	(978) 838-2442	Standard Energy Product
GARDNER	NGRID	WCMA	D.P.U. 16-113	4/28/2017	20,354	Mark Hawke	(978) 630-1490	Standard Energy Product
LANCASTER	NGRID	WCMA	D.P.U. 12-39	9/14/2012	8,054	Orlando Pacheco	(774) 450-5015	Standard Energy Product
LUNENBURG	UNITIL	WCMA	D.P.U. 11-32	11/30/2011	10,696	Heather Lemieux	(978) 582-4144	Standard Energy Product
MENDON	NGRID	SEMA	D.P.U. 16-72	4/28/2017	5,904	Kimberly Newman	(508) 478-8863	Standard Energy Product
MILLVILLE	NGRID	SEMA	D.P.U. 16-46	9/7/2016	3,210	Jennifer Callahan	(508) 883-1186	Standard Product 100% National Wind REC's
UPTON	NGRID	SEMA / WCMA	D.P.U. 16-71	11/14/2016	7,668	Derek Brindisi	(508) 529-6901	Opt-In 50% More Mass Class I REC's
WEST BROOKFIELD	NGRID	WCMA	D.P.U. 16-61	11/14/2016	3,759	Johanna Swain	(508) 867-1421 ext. 300	Standard Energy Product
WINCHENDON	NGRID	WCMA	D.P.U. 15-19	9/14/2015	10,542	Keith Hickey	(978) 297-0085	Standard Product 100% National Wind REC's

**TOTAL METERS, USAGE & SAVINGS**

<b><u>COMMUNITY</u></b>	<b><u>TOTAL METERS</u></b>	<b><u>TOTAL USAGE</u></b>	<b><u>TOTAL SAVINGS</u></b>
ABINGTON	5,206	41,633,356	322,595
ADAMS	2,518	15,156,065	294,130
ASHBY	1,165	8,322,425	75,325
ASHLAND	5,107	34,552,380	1,458,265
AUBURN	4,626	41,556,708	417,803
BERLIN	911	8,024,220	102,565
BERNARDSTON	670	4,691,940	13,632
BILLERICA	12,041	112,200,899	534,537
BURLINGTON	8,138	103,163,292	(542,233)
CHESHIRE	1,076	6,044,602	92,333
CLARKSBURG	502	2,879,196	49,615
DALTON	1,882	12,822,142	(447,831)
EGREMONT	630	4,259,568	56,105
FLORIDA	274	1,459,716	36,607
GARDNER	6,606	47,572,652	505,133
GREAT BARRINGTON	3,086	24,779,738	209,462
HALIFAX	2,231	20,459,630	176,697
HAVERHILL	16,971	130,511,280	(209,272)
HEATH	355	1,377,001	13,179
HOLLISTON	4,586	43,258,524	155,989
KINGSTON	4,511	37,158,024	316,270
LANCASTER	1,964	16,065,168	473,168
LANESBOROUGH	704	4,098,840	(220,628)
LENOX	3,273	22,340,862	12,723
LOWELL	24,558	162,899,376	372,241
LUNENBURG	3,180	25,215,408	96,477
MARLBOROUGH	11,121	97,868,748	2,646,245
MEDWAY	3,821	23,378,379	114,129
MENDON	1,680	28,573,575	211,764
METHUEN	13,283	98,004,300	182,926
MILLVILLE	841	6,074,353	38,275
MONTEREY	685	4,089,948	(17,269)
NEW ASHFORD	93	697,866	913
NEW MARLBOROUGH	841	5,654,676	73,986
NORTH ADAMS	3,614	20,380,248	119,790
ORANGE	2,204	21,142,707	222,700
PITTSFIELD	16,766	90,654,597	315,277
PLYMOUTH	22,408	177,405,133	1,672,893
PLYMPTON	897	6,245,481	30,053
SANDISFIELD	481	2,245,128	10,523
SHEFFIELD	1,417	9,395,484	115,212
STOUGHTON	8,687	56,947,053	328,590
TEWKSBURY	8,533	77,581,740	(348,685)
TYNGSBOROUGH	3,669	32,426,394	127,529
TYRINGHAM	280	359,049	(57,633)
UPTON	2,172	17,078,073	133,586
WENDELL	252	1,519,368	28,280
WEST BRIDGEWATER	2,477	25,165,840	168,297
WEST BROOKFIELD	1,042	7,577,157	97,602
WEST STOCKBRIDGE	685	4,552,536	50,883
WILLIAMSBURG	995	5,986,980	36,867
WILLIAMSTOWN	2,149	15,724,644	81,279
WINCHENDON	2,563	16,001,928	357,885
TOTAL	230,427	1,785,234,395	11,106,785

[ADDITIONAL DETAIL AVAILABLE UPON REQUEST]



## MARLBOROUGH COMMUNITY CHOICE POWER SUPPLY PROGRAM

The Marlborough Community Choice Power Supply Program is a municipal aggregation program. According to **Massachusetts law (M.G.L. c. 164, § 134)**, municipal aggregation enables local government to combine the purchasing power of its residents and businesses so that it can provide them with an alternative electricity supply. Once in place, the local government can monitor and set its own energy related goals for the program such as savings, stability or green options. Consumers are no longer “stuck” with the cost and fluctuation of the utility’s Basic Service rates because the program offers them another option.

This Program only affects the supply portion of your monthly bill. It will not affect the delivery portion. National Grid will continue to deliver your electricity but Marlborough, using a competitive bid process, has chosen the supplier for the Program.

The City of Marlborough is pleased to announce that **Verde Energy**, based in Norwalk, CT, has been selected as the supplier for its Program.

### Program Rate

November 2017 – May 2018

**\$0.10900 / kWh**

ALL RATE CLASSES

*Click here for more rate information.*

**OPT IN / OPT OUT**

### You will not notice any change in your electricity service.

You will continue to receive one bill from National Grid. You will continue to send your payments to National Grid for processing. National Grid will continue to respond to emergencies, read meters and maintain the distribution and transmission lines. Reliability and quality of service will remain the same. Furthermore, you will continue to have all existing consumer rights and protections.

The only noticeable difference will be in the appearance of your **National Grid bill**.

### If you received a notification letter

You do not need to take any action to participate in the Program. All Basic Service consumers that have received the notification letter and have not opted-out will be enrolled in the Program.

### If you have not received a notification letter

Your account was not eligible at the time of the mailing and you will NOT be automatically enrolled. However, may opt-in at any time by either clicking the OPT-IN button to the right, filling out and submitting the form OR calling Verde at **800-241-0295**.

*ENROLLMENT CAN TAKE UP TO TWO BILLING CYCLES BEFORE TAKING EFFECT.*

Periodically, the Program will send out a notification letter and an opt-out card to any consumer that is currently on National Grid’s Basic Service rate.

### If you have a budget plan or eligible low-income delivery rate

You will continue to receive those benefits.

### If you have solar panel consumers

You will continue to receive you **net metering credits**.

### If you have already chosen a competitive supplier on your own

If you have received a notification letter and have already chosen a competitive supplier on your own, you must opt-out of this Program. . This will ensure you continue to get your electricity from that Competitive Supplier. If you wish to leave that Competitive Supplier to be part of the Program, before opting-in, we suggest that you verify with that Competitive Supplier that they will not charge you any fees or penalties for leaving their supply service.

### If you have already chosen a green power supply option on your own

If you have received a notification letter and have already chosen a green power supply option, you must opt-out of this Program. This will ensure you continue to get your electricity from that Green Power Supply.

### If you are a tax exempt small business consumer

You must send a copy of your Energy Exemption Certificate directly to Verde Energy USA, 101 Merritt 7, Norwalk, CT 06851 in order to maintain your tax exempt status.

### If you do not wish to participate in this program

You may:

- 1) Opt-out and continue paying National Grid’s Basic Service rate; or

2) Opt-out and choose your own Competitive Supplier (if one is available to you).

### How to OPT-OUT

Within 30 days of receipt of the notification letter, fill out, sign, and return the enclosed card in the postage paid envelope OR click the OPT-OUT button to the right, then fill out and submit the form.

### Any time after enrollment

You can still opt-out with NO PENALTY CHARGE. It may take a couple of billing cycles before you are back on National Grid’s Basic Service. You may submit an opt-out form by clicking the OPT-OUT button to the right OR call Verde at **800-241-0295** and ask to be placed on National Grid’s Basic Service.

### If you fail to pay your bill in a timely manner

Consistent with the requirements of Massachusetts law, you may be switched back to the National Grid’s Basic Service.

*THE MARLBOROUGH COMMUNITY CHOICE POWER SUPPLY PROGRAM HAS NO PENALTY CHARGES WHETHER YOU ARE OPTING-OUT OR OPTING-IN.*

### QUESTIONS?

Contact Verde Energy

800-241-0295

### RESOURCES

Marlborough, MA, Home Page

Supply Disclosure Label

Aggregation Plan

### BASIC SERVICE RATES

National Grid

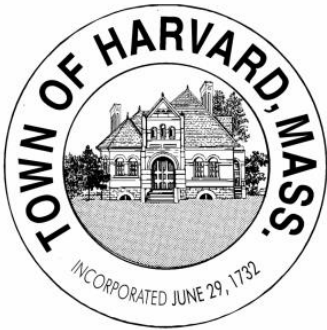
### MAIL OPT OUT CARDS TO:

City of Marlborough  
C/O Verde Energy USA  
101 Merritt Seven Corporate Park  
Second Floor  
Norwalk, CT 06851

### UNDERSTANDING YOUR BILL

### MEDIA





THE TOWN OF HARVARD’S  
COMMUNITY CHOICE POWER SUPPLY PROGRAM  
CONSUMER NOTIFICATION FORM

<Month> <Day>, <Year>

Dear Harvard Basic Service Consumer:

The Town of Harvard is pleased to announce that \_\_\_\_\_ has been selected as the supplier for its Community Choice Power Supply Program (“Program”). This Program is a municipal aggregation which enables local government to combine the purchasing power of its residents and businesses to provide them with an alternative to National Grid Basic Service (M.G.L. c. 164, § 134). This Program only affects the supply portion of your monthly bill. It will not affect the delivery portion of your monthly bill. National Grid will continue to deliver your electricity but Harvard has chosen the supplier for the Program. \_\_\_\_\_ will provide electric power supply for all consumers currently on Basic Service in Harvard. This letter is intended to tell you about this Program for electric power supply. In accordance with state law, it also informs you of your rights and options if you choose not to participate in the Program.

- ✓ **YOU WILL BE AUTOMATICALLY ENROLLED IN THIS PROGRAM** unless you choose not to participate and opt-out.
- ✓ **PLEASE RESPOND BY <MONTH> <DAY>, <YEAR> IF YOU DO NOT WISH TO BE AUTOMATICALLY ENROLLED.**

**YOU WILL NOT NOTICE ANY CHANGE IN YOUR ELECTRICTOWN SERVICE.** The only difference you will see is that \_\_\_\_\_ will be printed under the “Supply Services” section of your monthly bill. You will continue to receive one bill from National Grid. You will continue to send your payments to National Grid for processing. National Grid will continue to respond to emergencies, read meters and maintain the distribution and transmission lines. Reliability and quality of service will remain the same. Furthermore, you will continue to have all existing consumer rights and protections.

COMPARATIVE RATES AND TERMS

	Harvard’s Program* (Supply Services Only)		National Grid** (Supply Services Only)
	STANDARD	OPTIONAL GREEN	BASIC SERVICE
Rate			
Residential	\$X.XX per kWh	\$X.XX per kWh	\$X.XX per kWh
Commercial/Streetlight	\$X.XX per kWh	\$X.XX per kWh	\$X.XX per kWh
Industrial	\$X.XX per kWh	\$X.XX per kWh	\$X.XX per kWh
Renewable Energy Content	Meets Massachusetts renewable energy requirements	[TBD following competitive bid process]	Meets Massachusetts renewable energy requirements
Duration	_____ 2018 – _____ 2018 [Rates apply to service beginning and ending on the days of the month that your meter is read in your service area.]		_____ 2018 – _____ 2018 [Residential and Small Commercial rates change every 6 months. Large Commercial and Industrial rates change every 3 months.]
Exit Terms	NO PENALTY CHARGE		May receive a reconciliation charge or credit [Industrial G-2 & G-3 only]

\*Rate includes Consultant Fee of \$0.001 per kWh to facilitate Harvard’s Community Choice Power Supply Program.  
\*Rate includes Operational Adder of \$X.XXX per kWh to fund personnel costs associated with an Energy Manager position(s).  
\*\*GreenUp options are available for \$0.024-\$0.038 per kWh in addition to National Grid’s Basic Service rate.

IMPORTANT INFORMATION

- At Program launch the aggregation rate is lower than National Grid’s Basic Service rate. The aggregation rate is fixed for the first \_\_ months (\_\_\_\_\_ 2018 to \_\_\_\_\_ 2018) while National Grid’s Basic Service rate changes twice a year, in May and November. As a result, the aggregation rate will not always be lower than National Grid’s Basic Service rate. The goal of the aggregation is to deliver savings over the life of the Program against National Grid’s Basic Service rate. However, **SUCH SAVINGS AND FUTURE SAVINGS CANNOT BE GUARANTEED.**
- There is **NO PENALTY CHARGE TO OPT-OUT** of the Program and return to National Grid Basic Service.



**IF YOU HAVE BEEN MAILED THIS NOTIFICATION** you do not need to take any action to participate in the Program.

**ALL BASIC SERVICE CONSUMERS** who have been mailed this notification will be AUTOMATICALLY enrolled in the Program and start benefiting from the aggregation rate beginning on the day of the month in \_\_\_\_\_ that your meter is read. This date varies by service area. Your meter reading date is shown on your bill.

**WATCH YOUR NATIONAL GRID BILL FOR FURTHER NOTIFICATION** of the Program.

- Your \_\_\_\_\_ bill will state that you are being switched to Harvard’s Program.
- Your \_\_\_\_\_ bill will show Harvard’s supplier and aggregation rate under “Supply Services”.

**BUDGET PLAN OR ELIGIBLE LOW-INCOME DELIVERY RATE CONSUMERS** will continue to receive those benefits from National Grid.

**SOLAR PANEL CONSUMERS** will continue to receive their net metering credits while benefiting from the aggregation rate.

**TAX EXEMPT SMALL BUSINESS CONSUMERS** must send or fax a copy of their Energy Exemption Certificate directly to \_\_\_\_\_(Supplier)\_\_\_\_\_ at \_\_\_\_\_(Supplier address/fax)\_\_\_\_\_ in order to maintain their tax exempt status.

**IF YOU HAVE ALREADY CHOSEN A COMPETITIVE SUPPLIER ON YOUR OWN** you must opt-out of this Program. This will ensure you continue to get your electricity from that Competitive Supplier.

**IF YOU HAVE ALREADY CHOSEN A GREEN POWER SUPPLY OPTION ON YOUR OWN** you must opt-out of this Program. This will ensure you continue to get your electricity from that Green Power Supply.

**IF YOU DO NOT WISH TO PARTICIPATE IN THIS PROGRAM** you may: 1) Opt-out and continue paying National Grid’s Basic Service rate; or 2) Opt-out and choose your own Competitive Supplier (if one is available to you).

**HOW TO OPT-OUT**

- Sign and return the enclosed opt-out card in the postage paid envelope provided; **OR**
- Visit [www.colonialpowergroup.com/harvard/](http://www.colonialpowergroup.com/harvard/) and click the opt-out button, then fill out and submit the Opt-Out Form; **OR**
- Call \_\_\_\_\_ at \_\_\_\_\_ and ask to remain on National Grid Basic Service.

**ANY TIME AFTER ENROLLMENT** you can still opt-out with NO PENALTY CHARGE. It may take a couple of billing cycles before you are back on National Grid’s Basic Service. If you choose to opt-out after the initial enrollment, you may submit an Opt-Out form at [www.colonialpowergroup.com/harvard/](http://www.colonialpowergroup.com/harvard/) **OR** call \_\_\_\_\_ at \_\_\_\_\_ and ask to be placed on National Grid Basic Service.

**TO CHOOSE A GREENER PRODUCT WITH A HIGHER PERCENTAGE OF RENEWABLE ENERGY** you may call \_\_\_\_\_ at \_\_\_\_\_ and ask to be enrolled in Harvard’s Optional Green Product.

[Product option to be determined following the competitive bid process. The above acts as a placeholder and will be replaced with a product description including price, term, technology, vintage and location.]

**FOR MORE DETAILED INFORMATION** regarding Harvard’s Program please visit [www.colonialpowergroup.com/harvard/](http://www.colonialpowergroup.com/harvard/) or call us toll-free at (866) 485-5858. To learn more about \_\_\_\_\_ please visit [www.](http://www.)\_\_\_\_\_.

**TO ACCESS NATIONAL GRID’S BASIC SERVICE RATES** please visit:

- Residential Rates – [http://www9.nationalgridus.com/masselectric/non\\_html/MA\\_Residential\\_Table.pdf](http://www9.nationalgridus.com/masselectric/non_html/MA_Residential_Table.pdf).
- Commercial Rates – [http://www9.nationalgridus.com/masselectric/non\\_html/MA\\_Commercial\\_Table.pdf](http://www9.nationalgridus.com/masselectric/non_html/MA_Commercial_Table.pdf).
- Industrial Rates – [http://www9.nationalgridus.com/masselectric/non\\_html/MA\\_Industrial\\_Table.pdf](http://www9.nationalgridus.com/masselectric/non_html/MA_Industrial_Table.pdf).

*Colonial Power Group, Inc. is an energy consulting company chosen on a competitive basis by the Town of Harvard to facilitate the Community Choice Power Supply Program.*

**Este es un aviso importante. Por favor asegure que se traduce o visite nuestro sitio web.**  
**Este é um aviso importante. Queira mandá-lo traduzir ou visite nosso site.**

**HARVARD'S COMMUNITY CHOICE POWER SUPPLY PROGRAM  
CUSTOMER NOTIFICATION LETTER ENVELOPE**

**OFFICIAL TOWN BUSINESS**



**Town of Harvard**  
c/o Competitive Supplier  
1 Supplier Street  
Supplier, MA 00000

John Smith  
1 Main Street  
Harvard, MA 01451

PRESORTED  
FIRST-CLASS  
MAIL  
U.S. POSTAGE  
PAID  
STAMFORD, CT  
PERMIT NO. 102

**DO NOT DISCARD – IMPORTANT Notice Regarding Electricity Rates**

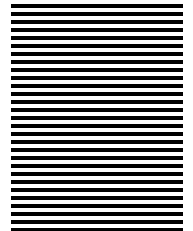
**HARVARD'S COMMUNITY CHOICE POWER SUPPLY PROGRAM  
CUSTOMER OPT-OUT NOTIFICATION CARD WITH REPLY ENVELOPE**

**BUSINESS REPLY MAIL**

FIRST-CLASS MAIL PERMIT NO. 41 MARLBOROUGH, MA  
POSTAGE WILL BE PAID BY ADDRESSEE

**CITY OF HARVARD**  
c/o COMPETITIVE SUPPLIER  
1 SUPPLIER STREET  
SUPPLIER, MA 00000

NO POSTAGE  
NECESSARY  
IF MAILED  
IN THE  
UNITED STATES



**HARVARD COMMUNITY CHOICE POWER SUPPLY PROGRAM  
OPT-OUT REPLY CARD**

John Smith  
1 Main Street  
Harvard, MA 01451

If you want to participate in the Harvard Community Choice Power Supply Program, you do not need to take any action. You will be automatically enrolled.

**Opt-Out Instructions**

**If you do not want to participate:**

- 1) Sign and date
- 2) Place in envelope provided
- 3) Drop in the mail

**X**

**Signature**

**Date**

The card must be signed by the customer of record whose name appears in the address on this card. Please return by \_\_\_\_\_ if you do not wish to be automatically enrolled.

\*\*\*\*\*PUBLIC NOTICE\*\*\*\*\*

THE TOWN OF HARVARD’S  
COMMUNITY CHOICE POWER SUPPLY PROGRAM  
CONSUMER NOTIFICATION

The Town of Harvard is pleased to announce that \_\_\_\_\_ has been selected as the supplier for its Community Choice Power Supply Program (“Program”). \_\_\_\_\_ will provide electric power supply for all consumers currently on Basic Service in Harvard. This notice is intended to tell you about this Program for electric power supply. In accordance with state law, it also informs you of your rights and options if you choose not to participate in the Program.

**YOU WILL NOT NOTICE ANY CHANGE IN YOUR ELECTRITOWN SERVICE.** The only difference you will see is that \_\_\_\_\_ will be printed under the “Supply Services” section of your monthly bill. You will continue to receive one bill from National Grid. You will continue to send your payments to National Grid for processing. National Grid will continue to respond to emergencies, read meters and maintain the distribution and transmission lines. Reliability and quality of service will remain the same. Furthermore, you will continue to have all existing consumer rights and protections.

COMPARATIVE RATES AND TERMS

	Harvard’s Program* (Supply Services Only)		National Grid (Supply Services Only)
	STANDARD	OPTIONAL GREEN	BASIC SERVICE
Rate			
Residential	\$X.XXXXX per kWh	\$X.XXXXX per kWh	\$X.XXXXX per kWh
Commercial/Streetlight	\$X.XXXXX per kWh	\$X.XXXXX per kWh	\$X.XXXXX per kWh
Industrial	\$X.XXXXX per kWh	\$X.XXXXX per kWh	\$X.XXXXX per kWh
Renewable Energy Content	Meets Massachusetts renewable energy requirements	[TBD following competitive bid process]	Meets Massachusetts renewable energy requirements
Duration	_____ 2018 – _____ 2018 [Rates apply to service beginning and ending on the days of the month that your meter is read in your service area.]		_____ 2018 – _____ 2018 [Residential and Small Commercial rates change every 6 months. Large Commercial and Industrial rates change every 3 months.]
Exit Terms	NO PENALTY CHARGE		May receive a reconciliation charge or credit [Industrial G-2 & G-3 only]

\*Rate includes Consultant Fee of \$0.001 per kWh to facilitate Harvard’s Community Choice Power Supply Program.

**IF YOU ARE A BASIC SERVICE CONSUMER WHO HAS BEEN MAILED A NOTIFICATION** you do not need to take any action to participate. You will be AUTOMATICALLY enrolled and start benefiting from the aggregation rate beginning on the day of the month in \_\_\_\_\_ that your meter is read. This date varies by service area. Your meter reading date is shown on your bill.

**IF YOU DO NOT WISH TO PARTICIPATE** you must OPT-OUT by signing and returning the Opt-Out Reply Card included with the mailed notification **OR** visit [www.colonialpowergroup.com/harvard/](http://www.colonialpowergroup.com/harvard/), click the OPT-OUT button and follow the instructions specified **OR** call \_\_\_\_\_ at \_\_\_\_\_.

**IF YOU WISH TO JOIN THIS PROGRAM** you may OPT-IN at [www.colonialpowergroup.com/harvard/](http://www.colonialpowergroup.com/harvard/) **OR** call \_\_\_\_\_ at \_\_\_\_\_ and ask to be enrolled.

**TO CHOOSE A GREENER PRODUCT WITH A HIGHER PERCENTAGE OF RENEWABLE ENERGY** you may call \_\_\_\_\_ at \_\_\_\_\_ and ask to be enrolled in Harvard’s Optional Green Product.

[Product option to be determined following the competitive bid process. The above acts as a placeholder and will be replaced with a product description including price, term, technology, vintage and location.]

Colonial Power Group, Inc. is an energy consulting company chosen on a competitive basis by the Town of Harvard to facilitate the Community Choice Power Supply Program. For more detailed information, call us toll-free at (866) 485-5858 ext. 1.

# **TOWN OF HARVARD COMMUNITY CHOICE POWER SUPPLY PROGRAM PUBLIC SERVICE ANNOUNCEMENT**

The Town of Harvard is pleased to announce that \_\_\_\_\_ has been selected as the supplier for its Community Choice Power Supply Program. \_\_\_\_\_ will provide electric power supply for all consumers currently on Basic Service in Harvard.

Check your mailbox for an envelope with the Town Seal on it. It contains information about the Program including a Consumer Notification Letter and Opt-Out Reply Card.

**BASIC SERVICE CONSUMERS** do not need to take any action to participate. You will be AUTOMATICALLY enrolled.

**IF YOU DO NOT WISH TO PARTICIPATE** you must OPT-OUT by signing and returning the Opt-Out Reply Card **OR** visit [www.colonialpowergroup.com/harvard/](http://www.colonialpowergroup.com/harvard/), click the OPT-OUT button and follow the instructions specified **OR** call \_\_\_\_\_ at \_\_\_\_\_.

**IF YOU WISH TO JOIN THIS PROGRAM** you may OPT-IN at [www.colonialpowergroup.com/harvard/](http://www.colonialpowergroup.com/harvard/) **OR** call \_\_\_\_\_ at \_\_\_\_\_ and ask to be enrolled.

*Colonial Power Group, Inc. is an energy consulting company chosen on a competitive basis by the Town of Harvard to facilitate the Community Choice Power Supply Program. For more detailed information, call us toll-free at (866) 485-5858 ext. 1.*



# **TOWN OF HARVARD**

## **COMMUNITY CHOICE POWER SUPPLY PROGRAM**

### **SOCIAL MEDIA ANNOUNCEMENT**

The Town of Harvard is pleased to announce that \_\_\_\_\_ has been selected as the supplier for its Community Choice Power Supply Program ("Program"). This Program is a municipal aggregation which enables local government to combine the purchasing power of its residents and businesses to provide them with an alternative to National Grid Basic Service (M.G.L. c. 164, § 134). This Program only affects the supply portion of your monthly bill. It will not affect the delivery portion of your monthly bill. National Grid will continue to deliver your electricity but Harvard has chosen the supplier for the Program. \_\_\_\_\_ will provide electric power supply for all consumers currently on Basic Service in Harvard.

Check your mailbox for an envelope with the Town Seal on it. It contains information about the Program including a Consumer Notification Letter and Opt-Out Reply Card.

**BASIC SERVICE CONSUMERS** do not need to take any action to participate. You will be AUTOMATICALLY enrolled. The aggregation rate is fixed at \$X.XXXXX per kWh for all rate classes for \_\_\_\_ months (\_\_\_\_\_ 2018 to \_\_\_\_\_ 2018).

**WATCH YOUR NATIONAL GRID BILL FOR FURTHER NOTIFICATION** of the Program.

- Your \_\_\_\_\_ bill will state that you are being switched to Harvard's Program.
- Your \_\_\_\_\_ bill will show Harvard's supplier and aggregation rate under "Supply Services".

**IF YOU DO NOT WISH TO PARTICIPATE** you must OPT-OUT by signing and returning the Opt-Out Reply Card **OR** visit [www.colonialpowergroup.com/harvard/](http://www.colonialpowergroup.com/harvard/), click the OPT-OUT button and follow the instructions specified **OR** call \_\_\_\_\_ at \_\_\_\_\_.

**IF YOU WISH TO JOIN THIS PROGRAM** you may OPT-IN at [www.colonialpowergroup.com/harvard/](http://www.colonialpowergroup.com/harvard/) **OR** call \_\_\_\_\_ at \_\_\_\_\_ and ask to be enrolled.

**TO CHOOSE A GREENER PRODUCT WITH A HIGHER PERCENTAGE OF RENEWABLE ENERGY** you may call \_\_\_\_\_ at \_\_\_\_\_ and ask to be enrolled in Harvard's Optional Green Product.

**[Product option to be determined following the competitive bid process. The above acts as a placeholder and will be replaced with a product description including price, term, technology, vintage and location.]**

*Colonial Power Group, Inc. is an energy consulting company chosen on a competitive basis by the Town of Harvard to facilitate the Community Choice Power Supply Program. For more detailed information, call us toll-free at (866) 485-5858 ext. 1.*

**TOWN OF HARVARD**  
**COMMUNITY CHOICE POWER SUPPLY PROGRAM**  
**FREQUENTLY ASKED QUESTIONS**

**1. WHAT IS THE “COMMUNITY CHOICE POWER SUPPLY PROGRAM”?**

The Community Choice Power Supply Program is a Municipal Aggregation Program which allows local government to combine the purchasing power of its residents to achieve savings on electricity costs. In doing so, it creates competition among Competitive Suppliers which helps ensure aggressive rates. Consumers are no longer “stuck” with the cost and fluctuation of Basic Service rates because the Program offers them another option.

**2. WHAT IS A "COMPETITIVE SUPPLIER"?**

A Competitive Supplier is a power supplier other than your Local Utility. Competitive Suppliers provide power supply to consumers either through a Municipal Aggregation Program or through a Competitive Supplier Program. Your electricity is currently being supplied by your Local Utility unless you have switched to a Competitive Supplier Program on your own. Your electric bill is divided into two parts: **Delivery and Supply**. The supply is no longer regulated and therefore can be provided by a Competitive Supplier. Delivery is still regulated and can only be provided by your Local Utility. Your Local Utility will continue to deliver your power supply over the wires. However, the power running through those wires can be provided by a Competitive Supplier.

**3. WHAT IS THE DIFFERENCE BETWEEN PROGRAMS ADVERTISED TO “LOWER YOUR ELECTRIC BILL” AND MUNICIPAL AGGREGATION PROGRAMS?**

Programs you see advertised are Competitive Supplier Programs in which the Competitive Supplier contracts directly with the individual consumer. While both Programs seek to lower your electric bill, they are run very differently. Competitive Supplier Programs set their own terms and conditions. Once signed up, it is up to the consumer to monitor the rates. Competitive Supplier Programs usually have a clause in the terms and conditions that states the consumer remains in the Program after the original rate and term have ended unless specific action is taken to cancel the contract. In many cases, there may be an exit fee. Municipal Aggregation Programs are run by cities or towns. Once signed up, it is up to the city or town to monitor the rates. Having knowledge of the electricity market, the city or town continually looks out for their citizens’ best interests. Their goals are to provide low, stable rates and possibly green options to their citizens. Municipal Aggregation Programs have no entrance or exit fees.

**BEWARE OF OTHER ENERGY OFFERS** claiming to be associated with your community or Local Utility. You may receive direct mail, phone calls or even visits to your door from energy marketers for the Competitive Supplier Programs mentioned above. These marketers are NOT associated with the Community Choice Power Supply Program or with your Local Utility. The Community Choice Power Supply Program will notify you of the Program ONLY through mail direct from your community (look for your Town’s seal).

#### **4. WHY HAVE I RECEIVED A CONSUMER NOTIFICATION LETTER?**

Your Town has signed a contract with a Competitive Supplier on behalf of your community as part of their Community Choice Power Supply Program.

#### **5. WHY HAVEN'T I RECEIVED A CONSUMER NOTIFICATION LETTER?**

You will not receive a Consumer Notification Letter if your Local Utility has your account listed as being contracted with a Competitive Supplier or if you have requested the Local Utility put a "Supplier Block" on your account so that it is removed from all supplier marketing lists. However, there is a lag between the date the utility provides the account data and the date the Consumer Notification Letters are mailed so there may be some accounts that are categorized wrong at the time of the mailing.

#### **6. HOW WILL BEING A PART OF THIS PROGRAM AFFECT ME?**

You will receive the benefit of potentially lower rates on your electricity and therefore a lower electric bill. Otherwise, YOU WILL NOT NOTICE ANY CHANGE. The only difference you will see is that the name of the chosen Competitive Supplier will be printed under the "Supply/Generation Services Charge" section of your monthly bill. You will continue to receive one bill from your Local Utility. You will continue to send your payments to your Local Utility for processing. Your Local Utility will continue to read meters and maintain the distribution and transmission lines. Reliability and quality of service will remain the same. Furthermore, you will continue to have all existing consumer rights and protections.

#### **7. WHAT DO I NEED TO DO TO PARTICIPATE IN THE PROGRAM?**

If you have received a Consumer Notification Letter AND you have not opted out AND your account is not listed with the Local Utility as having a "Supplier Block" (a request to have your account removed from all supplier marketing lists), you will not need to do anything to participate. You will be automatically enrolled in the Program.

#### **8. WHY HAVE I NOT BEEN ENROLLED, I THOUGHT IT WAS AUTOMATIC?**

Enrollment is automatic ONLY IF you have received a Consumer Notification Letter and have not opted out. Enrollment is NOT AUTOMATIC if you have not received a Consumer Notification Letter OR if your Local Utility has your account listed as being contracted with a Competitive Supplier at the time of the enrollment. Also, you will not receive a Consumer Notification Letter, and therefore will not be enrolled, if you have requested the Local Utility put a "Supplier Block" on your account so that it is removed from all supplier marketing lists. If that is the case, consumers may have to call their Local Utility to be enrolled in the Program.

#### **9. CAN I PARTICIPATE IN THE PROGRAM IF I DID NOT RECEIVE A CONSUMER NOTIFICATION LETTER?**

Yes, as long as your community has a DPU approved aggregation working with Colonial Power Group. You may OPT-IN AT ANY TIME by filling out the online Opt-In Form on your community's page at [www.colonialpowergroup.com](http://www.colonialpowergroup.com) OR by calling the Competitive Supplier chosen by your community (listed on your community's page) OR by calling Colonial Power Group at (508) 485-5858 ext. 1. To

avoid delays in your enrollment, before opting in, please make sure that if you have a "Supplier Block" on your account that it is removed. Also, if you have previously contracted with your own Competitive Supplier, you should confirm with them that you will not incur any fees for leaving their supply.

#### **10. WHEN WILL MY ENROLLMENT TAKE EFFECT?**

Your enrollment will start on the meter read date stated on the Consumer Notification Letter. You will see the new rate on your bill the following month. For example, if your meter read enrollment date is January 1, your usage from January 1 - January 31 will be charged the new rate and billed on February 1. If you opt-in at any other time, enrollment may take up to two billing cycles before taking effect.

#### **11. WHAT IF I DO NOT WANT POWER FROM THIS SUPPLIER?**

Each consumer has the right to choose his/her supplier. Enclosed in the Consumer Notification mailing is an Opt-Out Return Card. If you do not want to participate in the Community Choice Power Supply Program, you can sign and date the card, place it in the envelope provided and drop it in the mail OR fill out the Opt-Out Form on your community's page at [www.colonialpowergroup.com](http://www.colonialpowergroup.com) OR call the Competitive Supplier chosen by your community (listed on your community's page) OR call Colonial Power Group at (508) 485-5858 ext. 1. You will then be removed from the list of participating consumers. The initial opt-out period is thirty (30) days from the mailing date of the Consumer Notification Letter.

#### **12. WHAT IF I DECIDE I WANT TO OPT-OUT AFTER THE 30-DAY INITIAL OPT-OUT PERIOD?**

Participation is designed to be as flexible as possible. You may leave the Community Choice Power Supply Program at no charge and be placed on your Local Utility's Basic Service or choose another Competitive Supplier on your own. Opting out of the Community Choice Power Supply Program is easy. You may fill out the online Opt-Out Form on your community's page at [www.colonialpowergroup.com](http://www.colonialpowergroup.com) OR call the Competitive Supplier chosen by your community (listed on your community's page) OR call Colonial Power Group at (508) 485-5858 ext. 1. It may take a couple of billing cycles before you are back on your Local Utility's Basic Service. There is NO PENALTY CHARGE to opt-out.

Commercial consumers (G2, G3), if you participate initially and then choose to leave the Community Choice Power Supply Program, you may return only if accepted by the Competitive Supplier and at prevailing market rates.

#### **13. WHAT IF I HAVE ALREADY CHOSEN A COMPETITIVE SUPPLIER?**

The Local Utility records should indicate that you already have a Competitive Supplier. If so, you will not be enrolled in the Community Choice Power Supply Program. However, there is a lag between the date the utility provides the account data and the date the Consumer Notification Letters are mailed so there may be some accounts that are categorized wrong at the time of the mailing. This is why we recommend that you opt-out if you have received a Consumer Notification Letter but have contracted with a Competitive Supplier or have chosen a Green Power Supply Option.

#### **14. WHAT IF I AM ON A BUDGET PLAN OR ELIGIBLE LOW-INCOME DELIVERY RATE?**

You will continue to receive those benefits from your Local Utility.

#### **15. WHAT IF I OPERATE A BUSINESS AND HAVE A "TAX EXEMPT" STATUS, WHAT DO I NEED TO DO TO MAINTAIN MY STATUS UNDER THIS PROGRAM?**

According to Massachusetts law, in order to maintain your tax exempt status for your electric bill, you must send a copy of your tax exempt certificate directly to the Competitive Supplier chosen by your community. (The Competitive Supplier's name is listed on your community's page at [www.colonialpowergroup.com](http://www.colonialpowergroup.com).)

#### **16. WHAT IF I HAVE SOLAR PANELS ON MY RESIDENCE OR BUSINESS?**

Net Metering will work the same way with the Community Choice Power Supply Program. You will continue to receive your net metering credits while benefiting from the aggregation rate on your electricity. The Local Utility will continue to post your net meter credits to your electric bill at your Local Utility's Basic Service rate.

#### **17. HOW LONG DOES THE COMMUNITY CHOICE POWER SUPPLY PROGRAM LAST?**

The Community Choice Power Supply Program is in effect until the local government terminates the Program. Throughout the life of the Program, each subsequent contract will vary by rate, term and possibly Competitive Supplier. The latest rates, terms and contracted Competitive Supplier can be found on your community's page at [www.colonialpowergroup.com](http://www.colonialpowergroup.com) or by calling Colonial Power Group at (508) 485-5858 ext. 1.



THE COMMONWEALTH OF MASSACHUSETTS  
DEPARTMENT OF PUBLIC UTILITIES

CHARLES D. BAKER  
GOVERNOR

KARYN E. POLITO  
LIEUTENANT GOVERNOR

MATTHEW A. BEATON  
SECRETARY OF ENERGY  
AND ENVIRONMENTAL AFFAIRS

ONE SOUTH STATION  
BOSTON, MA 02110  
(617) 305-3500

ANGELA M. O'CONNOR  
CHAIRMAN

JOLETTE A. WESTBROOK  
COMMISSIONER

ROBERT E. HAYDEN  
COMMISSIONER

June 8, 2017

Mark Cappadonna, President  
Colonial Power Group  
277 Main Street  
Marlborough, MA 01752

Dear Mr. Cappadonna,

The Department of Public Utilities ("Department") has reviewed your application for renewal of your **Electricity Broker License, EB-107**, and is pleased to inform you that your application for renewal has been approved.

As a condition of maintaining this license, you must file updated information within 30 days of any material or organic change in the information required by 220 C.M.R. § 11.05(2), and you must comply with all relevant requirements of G.L. c. 164 and the regulations promulgated thereunder, including 220 C.M.R. §§ 11.00, 12.00 et seq. If you decide to request renewal of your license next year, please submit renewal application no later than June 1, 2018. The renewal application is available at: [www.mass.gov/dpu/suppliersandbrokers](http://www.mass.gov/dpu/suppliersandbrokers).

  
Mark D. Marini, Secretary