Attachment B: Application for Lead Technical Consultant

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| **Contact Information** | | | |
| **Lead Applicant Organization Name** | Click or tap here to enter text. | | |
| **Contact Name and Position** | Click or tap here to enter text. | | |
| **Street Address** | Click or tap here to enter text. | | |
| **City or Town** | Click or tap here to enter text. | | |
| **State** | Click or tap here to enter text. | **Zip Code** | Click or tap here to enter text. |
| **Contact Email** | Click or tap here to enter text. | | |
| **Contact Phone** | Click or tap here to enter text. | | |

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| **Organization Description**  *Complete this section once for every organization that is part of the Applicant team.* ***If there are multiple organizations that are part of the Applicant team, please copy this table for each organization that is part of the Applicant team****.* | |
| **Organization Name** |  |
| **Organization Description**  *Describe your organization’s history and mission (200 words maximum)* |  |
| **Supplier Diversity Office Certifications**  *Optional*  *(Please check all the apply)* | Does your company have any of the following certifications from Massachusetts’ [Supplier Diversity Office](https://www.mass.gov/certification-program-for-sdo):  Minority Business Enterprise  Women Business Enterprise  Service-Disable Veteran Business Enterprise  Veteran Business Enterprise  Lesbian, Gay, Bisexual, and Transgender Business Enterprise  Disability-Owned Business Enterprise |
| **Non-certified Diverse Business Enterprises** *Optional* | *Identify if you believe that your organization meets the criteria for any of the business enterprises above but has not completed certification with the Supplier Diversity Office:*  *Click or tap here to enter text.* |
| **Diversity, Equity, and Inclusion Mission or Vision Statement**  *Optional* | *Please include a brief summary of your organization’s diversity, equity, and inclusion mission or vision statement or a link to such a statement on your organization’s website. Please describe what your organization is proactively doing to promote diversity, equity, and inclusion and what steps you plan to take in the future.*  Click or tap here to enter text. |

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| **Review of Attachment C: Sample Agreement** | |
| **Has the Applicant reviewed Attachment C: Sample Agreement for Lead Technical Consultant? (Required)** | Yes |
| **Are there any changes to this template contract agreement that would be necessary before the Applicant could sign the contract?** (Note: MassCEC has limited ability to change our contract terms.) | No  Yes. If so, please elaborate below and/or provide an annotated version of Attachment C with your application.  Click or tap here to enter text. |

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| **Statement of Qualifications**  *Describe how the Applicant team meets all of the experience described in Section 4 (Eligibility). Please reference relevant past projects that Applicant team organizations (or individuals from those organizations) have worked on. Where applicable reference relevant certifications and credentials. As an attachment to this application, please include resumes of each individual who would be part of the project team. Additionally, Applicants may submit up to three samples of communication and marketing work.*  *Suggested word limits are to encourage concision. Applicants may write more if they feel it is necessary to address the prompt. Please do not feel obligated to approach the suggested word limit.* | |
| **Energy Assessment Experience**  *(suggested 200 word limit)* | *Click or tap here to enter text.* |
| **Technical Knowledge**  *(suggested 500 word limit)* | **Efficiency:**  *Click or tap here to enter text.*  **Decarbonization Solutions:**  *Click or tap here to enter text.*  **Heating Load Calculations:**  *Click or tap here to enter text.*  **Preliminary heating system design:**  *Click or tap here to enter text.*  **Transportation:**  *Click or tap here to enter text.*  **Electrical upgrades:**  *Click or tap here to enter text.*  **Clean Electricity:**  *Click or tap here to enter text.*  **Health and Safety:**  *Click or tap here to enter text.*  **Resilience:**  *Click or tap here to enter text.* |
| **Market Knowledge**  *(suggested 200 word limit)* | *Click or tap here to enter text.* |
| **Diversity, Equity, and Inclusion**  *(suggested 200 word limit)* | *Click or tap here to enter text.* |
| **Communication and Marketing**  *(suggested 200 word limit)* | *Click or tap here to enter text.* |
| **Analytical Capability**  *(suggested 200 word limit)* | *Click or tap here to enter text.* |
| **Cost Estimation**  *(suggested 200 word limit)* | *Click or tap here to enter text.* |
| **Facilitation and Project Management**  *(suggested 200 word limit)* | *Click or tap here to enter text.* |

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| **Proposed Approach**  *The sections below are an opportunity to describe the Applicant’s proposed approached to each of the Tasks described in the RFP. Any additions to the scope should be described separately as additional Tasks. Suggested word limits are to encourage concision. Applicants may write more if they feel it is necessary to address the prompt. Please do not feel obligated to approach the suggested word limit.* | |
| **Approach to Task 1**  *Please describe how the Applicant team would approach Task 1: Project Management*  *(suggested 300 word limit)* | *Click or tap here to enter text.* |
| **Approach to Task 2**  *Please describe how the Applicant team would approach Task 2: Market Summary and Participant Selection(suggested 300 word limit)* | **Task 2a: Market Summary**  *Click or tap here to enter text.*  **Task 2b: Applicant Outreach**  *Click or tap here to enter text.*  **Task 2c: Applicant Review**  *Click or tap here to enter text.* |
| **Approach to Task 3**  *Please describe how the Applicant team would approach Task 3: Assessment and Plan Protocol*  *(suggested 300 word limit)* | *Click or tap here to enter text.* |
| **Approach to Task 4**  *Please describe how the Applicant team would approach Task 4: Decarbonization Assessments and Custom Plans, including an estimated count of building plans included in proposed task budget*  *(suggested 300 word limit)* | *Click or tap here to enter text.* |
| **Approach to Task 5**  *Please describe how the Applicant team would approach Task 5: Market Resources*  *(suggested 300 word limit)* | *Click or tap here to enter text.* |
| **Approach to Task 6**  *Please describe how the Applicant team would approach Task 6: Market Transformation Needs Analysis*  *(suggested 300 word limit)* | *Click or tap here to enter text.* |
| **Additional Proposed Scope**  *Optional: If desired, please describe an added task or expanded scope which you believe would enhance the value of this initiative.*  *(suggested 300 word limit)* | *Click or tap here to enter text.* |
| **Additional Information about Proposed Approach**  *Please share anything else the Applicant team would like MassCEC to know about your proposed approach. Applicants may attach additional content if desired.*  *(suggested 300 word limit)* |  |

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| **Project Team Rates** | | | |
| **Organization** | **Name** | **Position** | **Hourly Rate** |
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| **Budget & Schedule**  *Fill out an estimated completion timeline and budget for each Task.* *The budget should reflect the proposed approach described above**. MassCEC suggests leaving at least $5,000 under Task 7 for additional miscellaneous tasks that may arise. Add additional lines for additional proposed Tasks as necessary.* | | | | |
| **Task Number** | **Task Description** | | **Estimated Completion Timeline from Contract Signing** | **Budget** |
| **1** | Project Management | |  |  |
| **2** | Market Summary and Participant Selection | |  |  |
| **3** | Assessment and Decarbonization Plan Protocol | |  |  |
| **4** | Decarbonization Assessments and Custom Plans | |  |  |
| **5** | Market Resources | |  |  |
| **6** | Market Transformation Needs Analysis | |  |  |
| **7** | Miscellaneous | |  |  |
| **Total Base Scope Budget** | | | |  |
| **8** | If applicable, additional proposed task | |  |  |
| **9** | (Add additional lines as necessary for any additional tasks) | |  |  |
| **Total Proposed Budget** | | | |  |
| **Schedule Narrative**  *Please provide any details about the anticipated schedule beyond the estimated completion timeline for each Task listed in the table above that the Applicant would like MassCEC to be aware of.*  *(suggested 200 word limit)* | |  | | |
| **Budget Narrative**  *Please provide any details about the budget beyond the budget for each Task listed in the table above that the Applicant would like MassCEC to be aware of.*  *(suggested 200 word limit)* | |  | | |

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| **References** | |
| *Include three references for the Applicant’s previous work. The references must include the name of the organization, contact person, a full address, email, and phone number, as well as a one sentence description of the Applicant’s work for the reference.* ***If there are multiple organizations that are part of the Applicant team, please copy this table for each organization that is part of the Applicant team****.* | |
| **Organization Name** |  |
| **Reference 1:** | Organization: Click or tap here to enter text.  Contact Name: Click or tap here to enter text.  Contact Title: Click or tap here to enter text.  Contact Email: Click or tap here to enter text.  Contact Phone Number: Click or tap here to enter text.  Description of the Applicant’s work for the Reference: Click or tap here to enter text. |
| **Reference 2:** | Organization: Click or tap here to enter text.  Contact Name: Click or tap here to enter text.  Contact Title: Click or tap here to enter text.  Contact Email: Click or tap here to enter text.  Contact Phone Number: Click or tap here to enter text.  Description of the Applicant’s work for the Reference: Click or tap here to enter text. |
| **Reference 3:** | Organization: Click or tap here to enter text.  Contact Name: Click or tap here to enter text.  Contact Title: Click or tap here to enter text.  Contact Email: Click or tap here to enter text.  Contact Phone Number: Click or tap here to enter text.  Description of the Applicant’s work for the Reference: Click or tap here to enter text. |

Please include the following attachments:

* Team Member Resumes: Include resumes of each individual who would be part of the project team.
* Writing Samples: Include up to three writing samples. In particular, MassCEC is interested in writing samples which demonstrate the Applicant team’s ability to communicate technical content to the public in a user-friendly way, case studies, and policy-focused analysis.