

MassCEC
Building Electrification and Transformation Accelerator (BETA): Commercial Buildings Pilot
Lead Technical Consultant Questions

November 22, 2022

General Questions:

1. What is MassCEC's fiscal year?

Answer: MassCEC follows the Commonwealth's fiscal year of July 1 to June 30.

2. We would like to ask for clarification regarding the types and amounts of insurance coverage required for the period of performance for BETA. The sample contract (Attachment C, page 2, 6.e.) states the following, but we were unable to find any definition of "appropriate insurance coverage" elsewhere in the documents provided. Could MassCEC please clarify if particular dollar amounts of coverage for particular types (liability, auto, etc.) will be needed for this contract? This would help us assess our ability to respond to this opportunity.

"E. Contractor certifies that appropriate insurance coverage for all activities under this Agreement has been obtained and shall be maintained in effect through the term of this Agreement. CONTRACTOR ACKNOWLEDGES THE SUFFICIENCY OF THE TYPES AND AMOUNTS OF INSURANCE COVERAGE MAINTAINED AND THE APPROPRIATENESS OF THOSE COVERAGES FOR THE DURATION OF THE TERM. At MassCEC's request, Contractor will provide MassCEC with copies of the certificates of insurance evidencing such coverage. The insurance requirements for the Project and pursuant to this Agreement are solely Contractor's responsibility and shall not relieve Contractor of any responsibility to MassCEC."

Answer: MassCEC does not stipulate particular dollar amounts of insurance coverage for contractors. Contractors are likely to have more expertise in their line of work than MassCEC and should carry insurance of the types and at limits they deem appropriate to the work.

3. We have noticed that there is a list of qualified organizations to lead and were wondering (1) if not being on this list precludes us from eligibility from applying as a lead with another organization as a sub or partner, and (2) how we might be able to register for this list for future opportunities.

Answer: This RFP does not specify a list of qualified organizations. MassCEC has previously issued a Request for Qualifications for technical and programmatic building decarbonization work for smaller research and support scopes. That RFQ (<https://www.masscec.com/request-qualifications-building-consultants>) does not pertain to this opportunity.

Program and Scope of Work Questions:

4. Will the program(s) developed through the BETA pilot be delivered through the Massachusetts Program Administrators (MA PAs) as part of Mass Save, now or in the future?

Answer: While it is not a specific pathway to larger program adoption as part of MassSave, one goal of the BETA: Commercial Buildings Pilot Program is to provide best practices, case studies, and other resources to support the development of and updates to potential MassSave electrification and decarbonization programs for commercial building customers.

5. If the program(s) developed through the BETA pilot are delivered through the MA PAs in the future, is it a conflict of interest for the company that designs the programs (i.e., the consultant selected through this process) to subsequently evaluate those programs?

Answer: Although MassCEC hopes that the BETA: Commercial Buildings Pilot will inform future Mass Save program offerings, there is no direct connection between the BETA pilot and Mass Save programs.

6. Will multifamily buildings be accepted into this program?

Answer: We anticipate selecting buildings from a variety of representative commercial building sectors, including large multifamily. We expect the solicitation for program participants to be released sometime next Spring.

7. Should the decarbonization plans created consider all-at-once or over-time retrofits?

Answer: The decarbonization protocol and plans developed for this Program should consider both all-at-once and over-time retrofits.

8. Is there a minimum set of building types you are expecting out of this pilot?

Answer: The building types to be evaluated through this pilot Program will be defined with MassCEC as part of the engagement, during Task 2. MassCEC anticipates that commercial buildings, including large multifamily, over 20,000 square feet in floor area and owned by small scale owners (1-2 buildings in portfolio), will be a key demographic. Larger buildings and larger scale owners will be considered as well. The goal of the Program is to reach a breadth of different building types, and proposals which address that goal will be considered favorably. Please see the Section 8 of the RFP, Selection Criteria for more information.

9. It's our understanding that there should be an emphasis on Environmental Justice Communities and small-scale buildings owners as part of the assessment. Are other types of owners and buildings expected to be analyzed? Large-scale building owners? Complex buildings (labs/hospitals)?

Answer: See above. In addition to buildings in Environmental Justice Communities and those owned by individuals and small companies, MassCEC will look to the results of the Market Summary in defining representative, high-emissions reduction impact, and addressable building types with the consultant selected for inclusion in the Program. Owners which may otherwise lack the resources to develop decarbonization assessments and plans on their own, such as small scale owners, will be an important group to consider.

10. For the market research task, what building market segments should be considered?

Answer: As above, the scope of the market research task is to be defined with MassCEC as part of the engagement, including at a minimum the aspects outlined in the RFP in Section 6, Scope of Work.

11. Do you have certain geographical locations in mind for the pilot participating buildings? City of Boston? Environmental Justice communities?

Answer: The criteria for pilot building participation will include a preference for buildings located in Environmental Justice Communities, and a broad geographic distribution of buildings selected across building types will also be considered. The Market Summary task should include an analysis of geographic considerations relative to the Program goals for breadth of impact.

12. How many building typologies and what fraction of the total building stock would MassCEC like to see covered in the Task 2a market assessment?

Answer: See above. The scope of the market research task, including the fraction of the building stock covered, is to be defined with MassCEC as part of the engagement.

13. Will campuses and industrial buildings be included in this Program?

Answer: MassCEC does not anticipate that large multi-building campuses or heavy industrial facilities will be included in this Program. Light industrial buildings and individual buildings which are part of larger campuses may be included.

14. How are MassCEC, through this Program, and the new MassSave commercial deep energy retrofits aligning?

Answer: MassCEC expects that at least a subset of the Decarbonization Assessments and Plans conducted under Task 4 will be for buildings also interested in pursuing deep energy retrofits under the new MassSave Commercial DER pathway. For those cases, MassCEC intends this effort to layer on top of the technical assistance provided for feasibility study through the DER pathway, potentially through the addition of over-time planning, alternative strategies, or additional financing direction, e.g.

15. Would you find it advantageous for the lead consultant to work with partners with specific government relations/policy-writing experience, or would it be sufficient to assist MassCEC and other agencies/institutions with producing marketing materials and other summary data?

Answer: MassCEC will consider government relations and policy-writing experience in reviewing proposals to the extent that the experience is relevant to that outlined in Section 4 of the RFP. Such experience would be most applicable to the communication and marketing experience described.

16. Given that the program is targeted toward building decarbonization, how does MassCEC envision incorporating transportation decarbonization strategies into the scope? Would this be limited to providing things like EV charging stations and bicycle racks to facilitate building

occupants transitioning away from petroleum vehicles? Or do you anticipate the consultant helping building owners plan for the purchase of their own electric vehicles?

Answer: The intention behind including transportation electrification is to ensure that decarbonization plans include a review of electrical system capacity at a given building for current and future vehicle electrification needs. MassCEC does not anticipate that the consultant selected will assist building owners in planning for the purchase of their own electric vehicles. So to the extent that internal facility vehicles are applicable to a given site, we'd want to include those in addition to any passenger vehicle charging infrastructure opportunity.

17. Should we assume that the electrification of transportation requirements include both passenger vehicles as well as internal facility vehicles (eg. forklifts, tractors, etc.?)

Answer: See above. The extent that internal facility vehicles are applicable to a given site, MassCEC would want to include infrastructure planning for those in addition to any passenger vehicle charging infrastructure planning.

18. Do Healthy and Safety measures, as envisioned by MassCEC, include quantitative/direct assessments of Indoor Air Quality (IAQ)? If so, would this analysis be limited to ventilation types/rates or would you find it advantageous for the lead program consultant to partner with subject matter experts on topics such as retrofitting with sustainable building materials/finishes, identifying and mitigating sources of indoor air pollutants, and testing for existing harmful substances, such as VOCs, mold, etc.?

Answer: MassCEC does not anticipate quantitative or direct assessments of IAQ within the scope of this Program. However, the impact of electrification and decarbonization measures on IAQ should be considered qualitatively in decarbonization assessments and plans. Insofar as building assessments include analysis of existing ventilation systems, MassCEC anticipates that measurements of ventilation flow rates may be included in the building assessment task.

19. To what extent should this work consider "supply-side" decarbonization strategies, such as procurement/installation of renewable electricity and low-carbon fuels?

Answer: Clean energy supply should be considered in the selected consultant's approach to decarbonization planning with electrification and efficiency. Clean electricity options are noted as an area of required expertise in the RFP in Section 4, Eligibility.

20. With respect to non-HVAC/plumbing end users of fossil fuels, such as cooking equipment and laundry equipment, would MassCEC find it advantageous for a lead technical consultant to partner with a subject matter expert in these areas to define best practices and retrofit considerations? Or would you expect it to be acceptable given the goals/budget of the program for the lead consultant to do market research and provide basic resources about how prospective building owners can procure non-fossil fuel options on their own without the aid of a professional services consultant?

Answer: We would anticipate that for fossil fuel equipment such as cooking and laundry equipment, market research and basic engineering considerations, as well as basic resources for

non-fossil fuel options should be sufficient for this Program, but we are open to teams which include a small scope for the participation of a subject matter expert on this topic.

21. You mention a couple of times in the RFP to “create the most value” from the assessments – do you have an understanding as to how you define value (eg. LMI communities vs. total GHG emissions impact vs. scheduling expediency vs. expansion over multiple types of building typologies, etc.?) Or is this something that would be defined as part of the engagement?

Answer: MassCEC anticipates that the areas to be prioritized in the decarbonization assessments and plans conducted under the Program will be defined with the consultant selected. All of the attributes listed are generally of interest to MassCEC.

22. Under Task 1, do you anticipate weekly or biweekly program status meetings to continue for the entirety of the program implementation (i.e. 2Q2023 through 3Q2024) or do you anticipate these meetings being needed more or less often during different phases of the program? If so, could you provide additional guidance on number of meetings expected?

Answer: Please note that MassCEC follows the Commonwealth’s Fiscal Year from July 1 through June 30, including for the estimated timeline described in this RFP. All Program dates given in the RFP are estimated and are subject to change at MassCEC’s discretion. Applicants should describe the anticipated frequency of meetings planned in the budget and schedule and proposed approach provided in their responses. MassCEC anticipates that meetings will be more frequent at the early and final phases of the program, and at key review points throughout, but we will review each applicant’s proposed approach to this task in context of the overall approach proposed.

23. With respect to Task 2b, approximately how much participant outreach is expected to be done by the consultant vs MassCEC and other agencies/institutions? Is it expected that the consultant will need continue outreach as long as is necessary to secure a minimum number of confirmed participants?

Answer: MassCEC expects to support the consultant selected in the participant outreach process, but that the bulk of the task is to be completed by the consultant. It is expected that outreach will need to continue until the minimum goal for confirmed participants is met, however the timing of tasks may be adjusted to allow continued outreach while subsequent tasks commence.

24. For the decarbonization protocols – we’re assuming that this is just for commercial buildings and does not involve Scope 1 decarbonization related to industrial or operating processes? Just fuels used for space heating, water heating, cooking, dryers, etc. alongside electricity (Scope 2)?

Answer: MassCEC will look to define the scope of buildings and processes included in assessments and plans with the consultant selected, depending on the findings of the market segmentation effort, but we do not expect to include heavy industrial buildings as part of the Program.

25. Under Task 4, when you refer to “detailed plans and implementation sequences” do you envision any specific design deliverables, such as drawings or specifications? Our reading of the

program goals is that the assessments are primarily structured as feasibility studies, conceptual planning, and budgeting exercises. We expect that no design services are being requested/needed, but it would be helpful to have additional clarity as to how detailed the plan is expected to be, how much budget cost certainty is expected/anticipated, and how much of the proposed plan is expected to be updated/built out by a subsequent licensed architectural or engineering designer.

Answer: MassCEC does not anticipate that design deliverables such as drawings or specifications will be provided within the planning exercises for the Program, except insofar as example detailed drawings or specifications are used to better communicate complex technical information. It is our expectation that the proposed decarbonization plans are to be updated and used to guide future architectural and engineering work. Some budget uncertainty is expected, within the consultant's best effort cost estimating of proposed plans.

26. The RFP states “conduct assessments, and develop detailed technical electrification and efficiency plans”—can you give an example of what type of ‘details’ you are looking for? Is it an ASHRAE level audit?

Answer: MassCEC invites novel proposed approaches to electrification and decarbonization assessment and planning, in addition to or in place of conventional assessment methods such as ASHRAE audits.

27. What is the maximum number of ‘plans’/buildings you are expecting out of the assessments task? Minimum listed as 10.

Answer: MassCEC looks to the consultant selected to propose an assessment and planning scope and to define a level of effort and number of plans feasible within the budget provided.

28. Do ‘10 plans’ include 10 buildings or could represent campuses as well?

Answer: We do not anticipate that campuses will be covered by the assessment and planning exercises under this Program, however, individual buildings or a small group of buildings which are part of a larger campus may be included.

29. Can you explain what you mean by “financial plans”?

Answer: By financial plans, we mean estimated implementation costs, operating costs, relevant financial metrics such as return on investment, and financing models and resources to implement electrification and decarbonization strategies recommended in the plans created for the pilot cohort of buildings within the Program.

Budget Questions:

30. Can the proposer offer different budget splits without it having negative impacts within the cost competitiveness section of the selection criteria?

Answer: MassCEC anticipates that the majority of the total budget (at least \$800,000 out of \$1,170,000) should be used for completing actual assessments and decarbonization plans. An

estimate of the number of plans to be completed within the proposed budget should be provided. Should applicants wish to propose a smaller budget amount for actual assessments and decarbonization plans, a justification and explanation of how the proposed assessment and plan count will be provided within the reduced budget should be included.

31. What % of the total value of this contract are you expecting Task 4 to be? As you may know, assessments have a high cost and could (in some cases) cover almost 70-80% of the overall budget.

Answer: See above. MassCEC anticipates that the majority of the total budget (at least \$800,000 out of \$1,170,000) should be used for completing actual assessments and decarbonization plans.

32. What is the anticipated budget for assessments versus market research?

Answer: See above. MassCEC has not set an estimated budget for the market research task.

33. Is there a possibility for these assessments to 'cost share' with Mass Save's existing C/I programs that also involve assessments? That can help reduce the budget portion of the assessments and the team can provide more input in other tasks.

Answer: Yes, MassCEC anticipates that a subset of the buildings selected for this pilot will also pursue Mass Save Deep Energy Retrofit offerings including technical assistance cost share. MassCEC would prefer that any reduction in assessment and planning cost due to this cost share be directed to completing assessments and plans for additional buildings.

34. Can you confirm that this will be a time and materials not-to-exceed contract?

Answer: This procurement may use an hourly not-to-exceed contract or a fixed price contract type. Respondents should state in their proposal the contract type preferred.

Application Process Questions:

35. Can we include additional attachments that can help further explain the timeline/process that we plan on using?

Answer: No, please do not include additional attachments beyond those listed in the RFP in Section 7, How to Apply.

36. Does MassCEC require any particular section headings in our response to requests for proposals (e.g., qualifications, references, project team summary, etc.)? If so, please describe the requirements for those sections.

Answer: Please see Attachment B: Application for Lead Technical Consultant for application section headings. Please label additional attachments clearly.

37. Since we are required to provide one PDF document via email per the RFP, please provide the maximum email/attachment size (MBs) you can receive. If a document is over the email size limit, can we divide into 2 pdfs/email submissions?

Answer: Please do not send files larger than 20MB. Please endeavor to provide responses within that size limit. Should your response document be over the size limit, please divide into multiple PDFs and send separately.

38. Can we add a cover and back with our logo to the application?

Answer: Yes.

39. On your website, it says the submission package must include:

1. Applicant's Signature and Acceptance Form (Attachment A)
2. Attachment B – Application for Lead Technical Consultant
- 3. Proposal**
4. Team Member Resumes (as an appendix)
- 5. Supplemental Materials (as optional appendices)**

However, the RFP (page 12) says the submission package must include:

- Complete Attachment A (Signature and Acceptance Form)
- Complete Attachment B (Application for Lead Technical Consultant).
- Attach:
 - Team Member Resumes: Include resumes of each individual who would be part of the project team.
 - Writing Samples: Include up to three (3) writing samples that demonstrate the Applicant team's ability to create public facing resources and or case studies, and/or policy-focused analysis.
- Review and be prepared to sign Attachment C (Sample Agreement for Lead Technical Consultant). Any requested change to Attachment C (Sample Agreement for Lead Technical Consultant) should be noted.

Please confirm which set of directions we must follow.

Answer: The website text contained an error and has been updated to match the text in the RFP.

40. On your website, it says "BETA Commercial Buildings Pilot" must appear in the e-mail subject line; however, the RFP says "BETA Commercial Buildings Pilot – Lead Technical Consultant Proposal" must appear in the email subject line. Please advise which subject line to use for submission.

Answer: Please use either but ensure that "BETA Commercial Buildings Pilot" appears at a minimum.

41. In Form B, under Statement of Qualifications, is the 500-word limit per each response (ie “Efficiency, Decarbonization Solutions, etc...”) or is it a total word limit?

Answer: The suggested word limit for Form B, Statement of Qualifications, Technical Knowledge, is 500 words total for that sub-section.