



Request for Proposals:
Climate-Critical Underrepresented Business Support Grants
FY27
MASSCEC-WFD-10162026

Date of Issue: October 16, 2026
First Deadline: December 11, 2026
Final Deadline: April 2, 2027

Anticipated Funding up to: \$5,000,000.00

Complete applications must be submitted through
workforce.cleanenergyeducation.org no later than 11:59 Eastern
Time (ET) on:
December 11, 2026
April 2, 2027

1. SUMMARY OF OPPORTUNITY

The Massachusetts Clean Energy Technology Center (“MassCEC”) announces the availability of funding under the third Climate-Critical Underrepresented Business Support (“CUBS”) grants Request for Proposals (“RFP”). Funded through the Equity Workforce Program, the CUBS grants program builds upon prior MassCEC investments in business support and workforce equity initiatives, expanding services through a Hub-and-Spoke service delivery model (“Hub and Spoke”), regional coordination, and sector-specific climate-critical business pathways. CUBS grants fund initiatives that assist Massachusetts-based underrepresented businesses (“Underrepresented Businesses”) entering and expanding in fields that are critical to meeting the Commonwealth’s climate goal of reaching net zero emissions by 2050.

New and expanding Underrepresented Businesses are essential to the design, manufacture, installation, and maintenance of clean energy and decarbonization projects across the state. These businesses put climate solutions into practice, foster environments that attract and support a diversified workforce, and pave the way for an equitable energy transition in environmental justice¹ and burdened² communities. Many Underrepresented Businesses encounter barriers that can limit business formation, growth, and participation in climate-critical industries including challenges accessing capital, developing business networks, identifying procurement opportunities, and navigating early-stage business growth. The MassCEC Equity Workforce Program seeks to address these barriers through a Hub and Spoke model in each of the seven (7) Workforce Skills Cabinet Regions³. Through this model, Underrepresented Businesses in each region will have access to a consistent baseline suite of business-support services, as well as guidance and technical assistance to navigate clean-energy contracting and procurement opportunities. Through CUBS, MassCEC seeks to strengthen Underrepresented Businesses by increasing clean-energy expertise, business activity, revenue, and long-term participation in climate-critical industries while supporting their growth as employers. Funded initiatives are expected to serve a broad group of Underrepresented Businesses relative to the amount of funding awarded and are not intended to support only one (1) or a very limited number of businesses.

The Hub and Spoke model offers a framework for statewide consistency and coordination and enables a unified marketing and outreach approach to enhance the activity of all grantees, while retaining flexibility for regional adaptability. Recognizing the complexity of supporting durable

¹ <https://www.mass.gov/info-details/environmental-justice-populations-in-massachusetts>

² MassEnviroScreen: <https://storymaps.arcgis.com/stories/536e0efba7a64103aa0055f1f98a26c3>

³ <https://www.mass.gov/doc/wsc-regional-map/download>

business-support infrastructure, MassCEC has adopted a phased approach to implementing the model, allowing for geographic expansion, regional adaptation, and continued alignment of services. Hub grants were awarded in the Greater Boston, Northeast, Pioneer Valley, and Southeast regions through prior CUBS solicitations.⁴ MassCEC seeks applications to establish Hubs in the remaining three (3) workforce regions (Berkshire, Cape and Islands, and Central Massachusetts). Planning grants were awarded in two (2) of those regions during a prior round to organizations exploring establishing Hubs, however other qualified applications demonstrating program designs with workforce and economic development best practices will be considered in those regions.

CUBS implementation grants support foundational business-support services that improve general business and contract readiness (“Core Services”), as well as procurement access and navigation (“Procurement Navigation”) that helps businesses prepare for, access, pursue, secure, and successfully perform contracting opportunities within defined climate-critical business pathways. In addition to Core Services, all hubs must directly provide Procurement Navigation within at least one climate-critical business pathway, and Spokes are expected to provide sector-specific Procurement Navigation or other services (“Specialized Services”) leading to measurable business success outcomes. Through this CUBS RFP, eligible grant applicants (“Applicants”) can submit proposals under one of four (4) distinct strands:

- **Strand A:** Serve as the primary regional service provider of Core Services, offer Procurement Navigation within at least one defined climate-critical business pathway, and act as the regional coordinating lead organization (“Hub”) aligned with one (1) of the seven (7) Workforce Skills Cabinet Regions.
- **Strand B:** Deliver Specialized Services, including sector-specific Procurement Navigation, designed to overcome sectoral barriers or to address the unique needs of a particular type of Underrepresented Business in one or multiple regions (“Spoke”).
- **Strand C:** Develop a Plan for implementing future Climate-Critical Underrepresented Business support initiatives (“Planning”). *Applicants to Strand C are strongly encouraged, but not required, to submit a Letter of Intent (“LOI”). The LOI allows applicants to receive early feedback on alignment with the RFP’s goals, priorities, and scoring criteria, including but not limited to demonstrated regional need, climate-critical sector(s) of focus, and proposed business services to be offered. Applicants may use this feedback to strengthen their proposals; however, submitting an LOI provides no preference or advantage in reviewing or scoring full applications. Directions on how to submit the LOI will be available through the Workforce Development Data Solutions Platform (“Platform”) (workforce.cleanenergyeducation.org) when you select Strand C.*

⁴ Any change in the regions available for Hub funding will be posted through the Workforce Development Data Solutions Platform and on the MassCEC website.

- **Strand D:** Build organizational capacity and develop, pilot, expand, or strengthen Climate-Critical Underrepresented Business support services ("Capacity Building").

If responding to more than one Strand, Applicants must submit a separate stand-alone application for each. Depending on the Strand, Applicants may apply for Twenty Thousand Dollars (\$20,000.00) to Eight Hundred Thousand Dollars (\$800,000.00) in funding for work completed over a period of six (6) months to three (3) years. Details about the range of acceptable funding requests across the various grant options are outlined in Section 5: Funding Available. Details about the application process are outlined in Section 9: How to Apply.

To solidify the regional ecosystem, awarded Hubs and Spokes serving the same workforce region will be required to execute a Memorandum of Understanding ("MOU") at the beginning of the grant period to establish cross-referral process agreements including, but not limited to, ongoing case management and performance reporting. All awarded grantees will be required to report to MassCEC monthly on agreed-upon performance metrics, including participant-level outputs and outcomes, and must demonstrate progress against at least one of the following metrics at regular intervals for participants enrolled in Procurement Navigation: vendor registration, capital or financing acquired, contracts won, revenue growth, staffing growth, businesses founded, or other business success metric approved by MassCEC. Reporting requirements, reporting frequency, and expenditure monitoring requirements will be specified in each grant agreement.

Funds for this program are expended from Equity Workforce Training Funds. Should additional relevant funds become available through the Equity Workforce funding or other sources, MassCEC may add funding to this RFP. The [MassCEC Workforce Development Data Solutions Platform](https://workforce.cleanenergyeducation.org) (workforce.cleanenergyeducation.org) serves as the official source for solicitation documents, application requirements, and RFP updates. Any amendments, updates, notices, or supplemental information will be posted to the Platform. Applicants are responsible for monitoring the Platform and the MassCEC website (www.masscec.com) throughout the solicitation period.

2. ABOUT MASSCEC

MassCEC is a quasi-public economic development agency of the Commonwealth of Massachusetts created by the state legislature. It is dedicated to accelerating the growth of the clean energy and climatetech sector across the Commonwealth to spur job creation, deliver statewide environmental benefits, increase affordability, and secure long-term economic opportunities for the people of Massachusetts. Since 2010, MassCEC has awarded \$990 million in programs and investments and attracted \$3 billion in private and public funds.

3. PROGRAM GOALS AND DESCRIPTION

Funds for this program will be expended from Equity Workforce Training Funds, initially created through the March 2021 Climate Legislation, *An Act Creating a Next Generation Roadmap for Massachusetts Climate Policy* and re-defined by the August 2022 Climate Legislation, *An Act Driving Clean Energy and Offshore Wind*⁵. This legislation directs MassCEC to administer the Equity Workforce Program to expand participation in the clean energy economy through workforce and market development initiatives. Through the Equity Workforce Program, MassCEC supports efforts to improve access to clean energy workforce, business, and procurement opportunities for historically underrepresented populations, including residents of communities experiencing significant cumulative environmental, climate, public health, and socioeconomic burdens.

The CUBS program prioritizes pathways that expand equitable access to economic opportunity through the climate-critical trades and industries, creating pipelines for Underrepresented Businesses to secure contracts, scale their skilled trades workforce, and maintain a long-term presence in the clean energy transition. Applicants proposing to enroll Underrepresented Businesses that employ workers within the highest-growth climate-critical occupations may be viewed more favorably, particularly where the proposed services support business growth and increased demand for occupations targeted through MassCEC-funded career pathway training programs. Examples include businesses engaged in high-performance building retrofits, including insulation, air sealing, electrical upgrades, clean heating and cooling systems including heat-pump installation and servicing, plumbing, and pipefitting; solar and battery-storage installation; ground-source and networked geothermal system construction, installation, servicing, and maintenance; electric power-line installation and repair; clean-energy manufacturing and fabrication; electric-vehicle charging infrastructure installation and maintenance; and other activities directly supporting the design, manufacturing, installation, and maintenance of clean energy and decarbonization projects. See the “Program Definitions” section for additional climate-critical occupational data.

CUBS grants are intended to achieve measurable, high-impact outcomes that advance equitable business growth in Massachusetts' clean energy economy. Funded initiatives are expected to improve business and contract readiness through business-support services, technical assistance, and targeted market-development activities. Procurement pathways provide the mechanism through which businesses apply that readiness to access contract opportunities, participate in climate-critical supply chains, and achieve business success outcomes. Funded efforts should contribute to participant-level outcomes such as increased access to capital and financing, revenue growth, business growth, contracts won, and workforce growth. Applicants will be expected to

⁵ <https://malegislature.gov/Laws/SessionLaws/Acts/2022/Chapter179>

propose a reasonable number of businesses to be enrolled and demonstrate a reasonable cost per participant in relation to the intensity of services, anticipated outcomes, and funding requested. Strong participant-level data collection and reporting are essential to understanding whether funded activities are reaching the intended businesses, improving business and contract readiness, and contributing to measurable business success outcomes. All grantees will be expected to collect complete and accurate participant-level data and submit monthly progress reports. By aligning grantee activities with clearly defined outputs and outcomes, MassCEC seeks to support the long-term participation and success of Underrepresented Businesses in climate-critical sectors.

Initiatives should aim to strengthen existing Underrepresented Businesses by providing industry-specific training, workforce development resources, and capacity-building services to enhance competitiveness in clean energy and climate-critical sectors. While activities supporting incremental business growth and capacity development such as credential-based progress are valued, Applicants must also propose supports that result in measurable business success outcomes. Competitive proposals will demonstrate a clear pathway from improved business and contract readiness to measurable business outcomes, such as executed contracts, increased revenue, verified market entry, or participation in clean-energy supply chains.

Climate-Critical Underrepresented Business Support (CUBS) Program Goals:

- Increase the number of Underrepresented Businesses that successfully compete for and secure contracts in climate-critical business fields;
- Increase expertise of Underrepresented Businesses in climate-critical business fields;
- Grow employment and revenue of Underrepresented Businesses that operate in climate-critical business fields and support their long-term sustainability and growth strategies;
- Create new Underrepresented Business firms in climate-critical fields and support the healthy long-term growth of those firms;
- Bridge gaps in existing support systems for Underrepresented Businesses, ensuring alignment with broader clean-energy workforce and economic development initiatives;
- Develop tailored business pathways supporting the unique needs and capacity levels of Underrepresented Businesses;
- Strengthen the small Underrepresented Businesses that make up a significant portion of the climate-critical employer base and support their growth as employers of occupations critical to the Commonwealth's clean energy transition; and
- Align with MassCEC-funded career pathway training programs by supporting connections between Underrepresented Businesses and MassCEC Equity Workforce Training providers, creating pathways for training program graduates to access employment opportunities within climate-critical industries while meeting the skilled labor needs of the sectors' businesses.

These goals will be achieved through the coordination and targeted service delivery enabled by the Hub and Spoke model, a strategic evolution in MassCEC's approach to supporting Underrepresented Businesses. This model is designed to balance centralized, statewide goals with localized service delivery fostering economic and skills development in all regions of the Commonwealth – Berkshire, Pioneer Valley, Central, Northeast, Greater Boston, Southeast, and Cape & Islands regions. The Hubs and Spokes within each of the workforce regions will be required to operate as an integrated network to support Underrepresented Businesses in the clean energy sector within that region. The designated Hub within a workforce region will be required to sign an MOU with each Spoke selected by MassCEC establishing cross-referral processes and standards. See Attachment 6: Sample Memorandum of Understanding. By coordinating service delivery through each Hub, grantees within each region will be better positioned to centralize and share resources, provide consistent service, rollout collaborative recruitment and engagement efforts, and consolidate data and research for evaluation and continuous improvement. More structured coordination will better position grantees to ensure that Underrepresented Businesses receive comprehensive support throughout the entire service journey and do not fall through the cracks when referred between business support programs.

CUBS supports Underrepresented Businesses in achieving business readiness and measurable business success within climate-critical business pathways. For the purposes of this program, climate-critical business pathways refer to the sectors, services, and supply chains essential to achieving the Commonwealth's mandated climate goals including renewable energy generation (solar, offshore wind, geothermal), decarbonization, electrification, grid modernization, energy efficiency, clean transportation, and climate resilience. Climate-critical pathways also encompass the businesses that offer administrative and logistical services to enable the deployment of clean energy technologies such as contract or full-service manufacturers. Applicants should clearly identify the climate-critical sectors, occupations, projects, procurement opportunities, or supply chains that participating businesses will enter, serve, or support. This solicitation is intended to support Underrepresented Businesses participating in climate-critical industries and supply chains. *General small-business support, sustainability planning, or operational improvements that may benefit individual businesses, without advancing participation in climate-critical industries, occupations, projects, procurement opportunities, or supply chains, are not responsive to this solicitation.*

Key Considerations in Program Design

While by no means exhaustive, the list below highlights relevant best practices and design considerations:

- **Determine climate-critical business pathways.** Awardees must provide programming

that prepares Underrepresented Businesses to enter and succeed in climate-critical sectors critical to the Commonwealth achieving 2030 emission goals and net zero emissions in 2050. Applicants are encouraged to consult the Massachusetts Clean Energy Workforce Needs Assessment, available at <https://www.masscec.com/resources/massachusetts-clean-energy-workforce-needs-assessment>, and other direct sources of industry and labor market intelligence to identify and consider demand. Based on current and continued demand, Applicants proposing support for businesses in clean heating and cooling, electrification, battery storage, networked geothermal, and clean transportation may be viewed more favorably. MassCEC's four climate focus areas, High-Performance Buildings, Offshore Energy, Clean Transportation, and Net Zero Grid, collectively account for approximately 87% of the Commonwealth's clean-energy workforce and are projected to require workforce growth through 2030. Priority climate-critical business activities include the design, manufacture, construction, installation, and maintenance of clean energy and decarbonization systems and projects. Examples include high-performance building retrofits; clean heating and cooling systems, including heat-pump installation and servicing; solar and battery-storage installation; electrical work; high-performance construction; and electric-vehicle charging infrastructure installation and maintenance. Applicants may also propose programming focused on other climate-critical sectors, provided they clearly demonstrate how the participating businesses will contribute to clean energy or decarbonization projects, respond to regional market needs and barriers, and achieve measurable business outcomes.

- **To effectively address specific barriers to success**, strategies to support Underrepresented Businesses must be tailored to the specific challenges, mindful of the stage of business development, and transparent about how the model may or may not fit the needs of different businesses. Wraparound and support services that mitigate potential barriers for businesses success are viewed favorably by MassCEC. These services should be clearly identified within service plans as separate and distinct from Core and Specialized business support services.
- **Comprehensive support and wraparound services for program participants** can extend the capacity of Underrepresented Businesses to engage fully in proposed programming. Building these supports into the design and budget of the program in advance not only prioritizes the needs of the participants, but it also normalizes that business owners can be successful and still need additional support in the form of access to transportation, childcare, training stipends, extended career counseling, and referrals for other services.
- **Support organizations can maximize impact by addressing both “supply” and “demand” needs.** For example, working with Underrepresented Businesses to ensure that they are certified by the Massachusetts Supplier Diversity Office can have greater impact when paired with efforts to educate purchasers, expand

awareness of certified businesses, and facilitate connections to contracting and procurement opportunities.

- **Tailor recruitment, services, and resources to the specific types of Underrepresented Businesses to be served.** Depending on the climate-critical sector and stage of businesses that organizations seek to support, different models and service offerings are likely to have variable success and impact. Engagement of interested parties to inform a needs assessment process and model development can ensure that organizations have a clearer idea of which offerings are going to be the most beneficial. Regardless of the models used, successful programs should incorporate high-touch, individualized support that reflects the specific needs, readiness levels, and growth opportunities of enrolled business participants.
- **Establish clear eligibility requirements and rigorous, transparent, and thorough intake and assessment processes.** Intake and assessment stages not only allow program administrators to check eligibility and gauge level of need, both in terms of support services and capital, but also serve as important touchpoints to set clear participation and reporting standards with participants that may impact long-term success.
- **Establish robust participant data tracking and monitoring processes.** Applicants should establish a business-capacity baseline for each enrolled participant and collect follow-up data sufficient to measure changes following participation in the program. Tracking should include services and referrals received, changes in business and contract readiness, business success outcomes, and other information needed to assess program impact and support continuous improvement.
- **Partnering is essential for the success of individual programs and the growth of the broader support ecosystem.** Business support needs span many categories and services. Therefore, it is important for support organizations to clearly delineate which services they are best equipped to offer internally, which ones they want to partner to offer, and which services can only be offered through referral to other organizations.
- **Research existing funding resources and opportunities available to Underrepresented Businesses** in the Commonwealth by identifying key financial institutions and organizations serving Underrepresented Businesses, ascertaining eligibility criteria and application processes, and gauging applicability to climate-critical Underrepresented Businesses.
- **Provide retention and post-program supports** for at least one year including services such as advanced training, network access, referrals, or ongoing wraparound supports that promote long-term business growth. For purposes of this RFP, retention includes planned follow-up after service delivery to sustain participant engagement, support progress toward outcomes, address barriers, and collect outcomes data. Applicants should distinguish between active service delivery, retention services, and post-program outcomes monitoring.

Program Definitions:

For the purposes of this RFP and in accordance with the Program goals, MassCEC is defining the key terms as follows:

Burdened Area: A Massachusetts census block group identified through the Commonwealth's MassEnviroScreen tool as experiencing significant cumulative burdens related to environmental exposures, environmental effects, climate risks, sensitive populations, and socioeconomic factors. A census block group is designated as a Burdened Area when it has a MassEnviroScreen cumulative burden percentile score of seventy-five (75) or greater or an annual median household income equal to or less than sixty-five percent (65%) of the statewide annual median household income.

Climate-Critical Priority Occupations: Occupations critical to the Commonwealth achieving 2030 emissions goals and net zero emissions in 2050. Applicants are encouraged to consult the MassCEC Clean Energy Needs Assessment, and the companion data workbook, both available at <https://www.masscec.com/resources/massachusetts-clean-energy-workforce-needs-assessment> for a comprehensive detailing of climate critical priority occupations. Additionally, MassCEC anticipates releasing an online Climatetech Labor Market Intelligence Hub in November 2026 which will offer insights on climate-critical occupations within MassCEC's focus areas using a customized analysis of online job postings. When available, this source will be linked at workforce.cleanenergyeducation.org as well as MassCEC's website. The list below provides examples of Climate-Critical occupations by MassCEC focus area. Applicants are welcome to make a case for additional occupations not listed here or in the Needs Assessment's priority occupations list.

- High-Performance Building Sector Occupations (for retrofit and new construction): Electricians and Electrical Contractors with expertise in building service upgrade, knob, and tube removal and/or heat pumps; Insulation Workers; Weatherization Crew Chiefs and Supervisors; Energy Auditors; HERS Raters; HVAC/R Technicians with heat pump expertise, ground-source heat pump technicians; Carpenters and Construction Laborers; Hazardous waste removal specialists (especially for asbestos and vermiculite removal); Building Operators/Maintenance Mechanics; Plumbers and Pipefitters; Customer Service Representatives.
- Offshore Wind Occupations: Installation, Maintenance and Repair Workers; Structural Metal Fabricators and Fitters; Wind Turbine Service Technicians; Metal and Plastic Workers, Assemblers and Fabricators; Customer Service Representatives.
- Net Zero Grid Occupations: Electricians and Electrical contractors specializing in solar, battery storage, grid upgrade, networked geothermal, or time of use metering; Electric Power Line Installers and Repairers; Customer Service Representatives.
- Clean Transportation Sector Occupations: Electricians and Electrical Contractors specializing in vehicle charging infrastructure; Automotive Technicians and Repairers with experience in electric vehicle maintenance or large vehicle retrofit; Logisticians and Fleet Managers; Customer Service Representatives.

Environmental Justice Populations: As defined by the Massachusetts Department of Energy and Environmental Affairs (EEA), are “segments of the population determined to be most at risk of being unaware of or unable to participate in environmental decision-making or to gain access to state environmental resources, or are especially vulnerable”.

- “Environmental Justice (“EJ”) Neighborhood” means a census block group where:
 - Twenty-five percent (25%) of households have an annual median household income that is equal to or less than sixty-five percent (65%) of the statewide median income; or
 - Forty percent (40%) of its population is Minority; or
 - Twenty-five percent (25%) or more of the households lack English language proficiency; or
 - Minorities comprise twenty-five percent (25%) or more of the population and the annual median household income of the municipality in which the neighborhood is located does not exceed one-hundred fifty percent (150%) of the statewide annual median household income
- “Minority” refers to individuals who identify themselves as Latino/Hispanic, Black/African American, Asian, Indigenous people, and people who otherwise identify as non-white (see additional definition below).
- “Low-income” means median household income at or below sixty-five percent (65%) of the statewide median income for Massachusetts, according to federal census data.
- To see census block groups that meet the Environmental Justice definition, see Environmental Justice Map Viewer⁶.

Massachusetts business: Business entity that maintains an official registered business address within the Commonwealth of Massachusetts, including a usual place of business located in Massachusetts or a Massachusetts Registered Agent address on file with the Massachusetts Secretary of the Commonwealth. Businesses headquartered outside of Massachusetts may qualify if they are duly registered to operate within the Commonwealth and actively conduct business activities in Massachusetts.

Potential Barriers: For the purposes of the solicitation, MassCEC has identified potential barriers (“Potential Barriers”) that may limit the ability of individuals participating on behalf of an enrolled Underrepresented Business to access, engage in, or benefit fully from program services, training, or related opportunities. Potential Barriers may include, but are not limited to:

- Childcare and/or other caregiving costs;
- Limited access to a vehicle and/or public transportation;
- Tool/equipment purchase costs;
- Training fees, tuition, or other educational costs;
- Access to Internet and computers or other connective devices;

⁶ <https://mass-eoeaa.maps.arcgis.com/apps/webappviewer/index.html?id=1d6f63e7762a48e5930de84ed4849212>

- Opportunity costs of time spent in training or educational programs;
- Housing and/or food insecurity;
- Cultural barriers;
- Language barriers; and
- Owner/lead staff capacity constraints

Supplier Diversity Office (SDO): State office that promotes diversity, equity and inclusion in state contracting by certifying eligible diverse and small businesses, connecting those businesses with opportunities and resources, and collaborating with public agencies and organizations to remove barriers and increase supplier diversity spending. SDO certification and recognized certification categories include:

- Minority Business Enterprise (MBE)
- Women Business Enterprise (WBE)
- Portuguese Business Enterprise (PBE)
- Veteran Business Enterprise (VBE)
- Lesbian Gay Bisexual Transgender Business Enterprise (LGBTBE)
- Service-Disabled Veteran-Owned Business Enterprise (SDVOBE)
- Disability-Owned Business Enterprise (DOBE)

Underrepresented Business: Business that is at least 51% owned and operated by an individual or group that is part of a traditionally underrepresented or underserved group such as members of federally recognized or state-acknowledged tribes or businesses eligible for certification through the Massachusetts Supplier Diversity Office or other recognized certification. A business may also qualify for CUBS participation if its principal place of business is located in a designated Burdened Area and it demonstrates a meaningful economic connection to Burdened Areas or their residents through the populations it serves, the location of its contracts or projects, or the residence of its employees.

4. SCOPE OF WORK

CUBS awards will support different combinations of business support, technical assistance, Procurement Navigation, organizational capacity-building, and planning activities based on the applicable funding strand. The sections below describe the required and eligible activities for Hubs, Spokes, Capacity Building, and Planning awards. Applicants must propose a clear approach to delivering the applicable activities, including the roles of staff, subcontractors, and partners; methods and anticipated levels of service; and the relationship between proposed activities and measurable outcomes.

Hubs and Spokes will be expected to connect participating Underrepresented Businesses with relevant MassCEC-funded Equity Workforce Training program graduates to support equitable

hiring and talent pipeline development in climate-critical occupations. MassCEC will provide available contact information for relevant Equity Workforce Training providers to facilitate these connections.

Strand A: Expectations for Hubs

With this funding, MassCEC seeks organizations to serve as regional Hubs that will collectively provide baseline Core Services to Underrepresented Businesses across the Commonwealth, directly offer Procurement Navigation within at least one defined climate-critical business pathway, and serve as focal points in each region for recruiting and navigating Underrepresented Businesses to appropriate Spokes for Specialized Services. Hubs serve as the primary public-facing entities responsible for raising awareness about the CUBS ecosystem and engaging interested parties in their designated region; as a central point of contact, grantees will offer regional coordination for outreach, intake, communication, and coordination of service referrals. MassCEC encourages collaborative Hub models in which multiple organizations partner to apply as a Hub that leverages complementary strengths, such as established intake and referral networks, trusted relationships with target business populations, regional presence, or climate-critical business expertise. Applicants should clearly define partner roles and responsibilities. For the purposes of this solicitation, one organization must serve as the Lead Applicant. Partner organizations receiving grant funds or implementing a defined portion of the proposed scope of work will be classified as subcontractors and must be identified accordingly in the application and budget.

Hubs are expected to provide a comprehensive core suite of services to Underrepresented Businesses located in or serving a defined workforce region. These Core Services are intended to expand participation in the climate-critical industries by helping Underrepresented Businesses become “business ready” to secure clean energy contracts, access capital, scale operations, and contribute to the Commonwealth’s climate goals. Proposed activities may include supporting Underrepresented Businesses in obtaining Massachusetts Supplier Diversity Office (SDO) certification or similar credentials, delivering tailored administrative and back-office services to improve operational efficiency, and offering targeted financial planning and business coaching. Hubs must offer services and training within the major categories of: **Financial Planning, Operations, Management, Network Access, Business Development, and Certification Support.** Core Services may be delivered through a combination of one-on-one technical assistance, cohort-based programming, workshops, peer-learning opportunities, referrals, and other service models; however, Hubs are expected to provide high-touch individualized support appropriate to participant needs.

Table 1. Core Services and Examples, identifies the Core Service categories as well as program delivery examples. Note that the examples below are not a comprehensive list and other related activities may be acceptable.

Hub Core Services	Examples
☑ Financial Planning	Provide access to a consultant to support Bookkeeping and Accounting
	Host webinars and office hours on applying for Tax Savings and Incentives
	Provide resources to enable Access to Capital and Financing
☑ Operations	Help with Process Improvement such as streamlining reporting
	Assist with Regulatory and Legal Compliance such as filing tax reports
	Guide through Business Registration to attain incorporation
☑ Management	Assess Talent Recruitment processes to enable equitable labor recruitment
	Provide Human Resources support to ensure inclusive work environments
	Streamline Payroll and Benefits administration to reduce burden
☑ Network Access	Run procurement summits or workshops to promote Industry Relationship Building
	Nurture warm connections to increase Union, Municipal, Company Engagement
	Direct to relevant Networking Events
☑ Business Development	Guide through market research to develop Market Strategy
	Help set up sound processes for Customer Discovery
	Coach through Pitch Development
☑ Certification and Licensing	Guide businesses through Supplier Diversity Office (SDO) certification
	Assist businesses with general certifications (e.g., Veteran-owned, B Corp, etc.)
	Support attainment of industry certifications, licenses, or qualifications

Hubs are not intended to function solely as providers of foundational business support. In addition to delivering Core Services, all Hubs must offer Procurement Navigation focused on at least one defined climate-critical business pathway. (Table 2)

Table 2. Clean Energy Procurement Navigation and Examples

☑ Procurement Navigation	Support businesses in meeting procurement qualification requirements
	Facilitate introductions to procurement decisionmakers, prime contractors, utilities, municipalities, or lead vendors
	Support bid preparation and proposal development
	Support businesses to meet contract requirements and successfully implement awarded projects

The Hub’s Procurement Navigation pathway is intended to function similarly to a sector-specific Spoke program, with a defined participant group, Specialized Services, and measurable business success outcomes. Procurement Navigation may include readiness assessments, vendor registration, preferred-vendor application support, bid preparation, matchmaking with prime contractors or procurement decisionmakers, contracting strategy, and post-readiness support that helps qualified businesses compete for, secure, and successfully perform climate-critical contracts. While not all participating businesses will receive Procurement Navigation services directly from the Hub, each Hub must maintain internal expertise and service offerings within a climate-critical business pathway to support businesses seeking to access clean energy contracting opportunities. Depending on business need, participants may receive only Core Services, receive Procurement Navigation services directly through the Hub, or may be referred to a Spoke for additional climate-critical sector expertise or specialized support.

Hubs are required to offer all Core Services and sectoral Procurement Navigation, but may subcontract with partners or third-party vendors, subject to the approval of MassCEC, to deliver elements of these services. Hubs that opt to subcontract any portion of services are still responsible for the administration, oversight, monitoring, and outcomes of those services and supports. Where Procurement Navigation, such as sector-specific procurement access services and equitable contracting supports, is outsourced, Applicants must demonstrate a clear plan for building clean energy expertise and internal programmatic capacity within the lead application organization, or include a clearly delineated scope of work that outlines partner roles and responsibilities, including how clean energy expertise will be integrated into the overall service workflow and program delivery.

Delivery of Core Services by a Hub will be expected to result in a reasonable proportion of participating Underrepresented Businesses attaining business readiness, contract readiness, or successful referral into specialized procurement, capital, or business-support

pathways, in relation to the services provided, per participant cost, and funding awarded. Generally, achieving “business ready” state will be signaled by those Underrepresented Businesses attaining one or multiple performance metrics such as inclusion on preferred vendor lists, attainment of licenses or certifications, or bids submitted. Since being “business ready” can vary depending on the procurement opportunity and/or clean energy sector targeted by the participating Underrepresented Business, Hubs will need to be prepared to offer services at varying levels responsive to the unique situation of each Underrepresented Business.

Hubs will be expected to monitor and report participant-level performance metrics aligned with the services delivered. For business participants receiving Core Services, Hubs will be expected to track attainment of business-readiness and contract-readiness milestones, including successful referrals to Specialized Services when appropriate. Hubs are encouraged to continue monitoring longer-term participant outcomes when businesses transition into procurement or Specialized Services delivered by Spokes or other partners.

For purposes of service delivery and performance measurement, the Hub’s Procurement Navigation pathway functions similarly to a sector-specific Spoke program operated directly by the Hub. Participants enrolled in this pathway are subject to the same business-success expectations applicable to Spoke participants. For participants enrolled in a Hub’s procurement services pathway, Hubs will be expected to track and report business success outcomes. At least 70% of participants enrolled in the Hub’s Procurement Navigation programming should achieve one or more approved business success outcomes, such as contracts secured, access to capital or financing, revenue growth, workforce growth, participation in approved vendor programs, market expansion, or other approved outcomes. Accordingly, Hubs should maintain separate reporting and performance-tracking processes for participants receiving Core Services and participants enrolled in Procurement Navigation services.

Hubs will be expected to deploy a service plan to ensure successful administration of Core Services and Procurement Navigation. A service plan workflow will typically include, but not be limited to, marketing and outreach to recruit Underrepresented Businesses and build relationships with relevant partners; defined intake and assessment processes to assess eligibility and needs; administering business assessments to tailor services and determine appropriate referrals; delivery of Core Services and Procurement Navigation supports if applicable; managing referrals to and from Spokes; and post-program retention services and monitoring to report participant outcomes and ensure attainment of performance metrics. Service plans will also clearly define anticipated methods of delivery and dosages and staff and partner roles and responsibilities in relation to each component of the service workflow.

Hubs will be expected to have the staff capacity to effectively provide coordination and data collection across the designated workforce region and to undertake the ongoing case management to enable Underrepresented Businesses to fully realize the benefits of the regional cross-referral ecosystem. Hubs may collaborate with subcontracted partner organizations to strengthen their administrative capacity.

Hubs, acting as regional anchors, will:

- **Staff a known physical location** during established and publicized hours to provide in-person support to Underrepresented Businesses at least two days per week;
- Execute MOUs with all assigned regional Spokes and **oversee and coordinate the bi-directional cross-referral system** with Spokes;
- Lead ongoing **case management and tracking** of Underrepresented Businesses in the cross-referral system to ensure that participants are retained and reach success;
- Collect and consolidate **performance metrics and reporting data** from Spokes into regional reports for submission to MassCEC;
- Coordinate with MassCEC and Spokes to implement **statewide marketing and outreach campaigns and regional marketing strategies** to enhance recruitment;
- Maintain close communication with MassCEC and Spokes to align with state-level goals and ensure that resource expenditures align with sub-sector needs;
- **Convene** partners, financial institutions, workforce representatives, economic development organizations, and Spokes to support state-level goals and continuous program improvement through convening, focus groups, and community workshops; and
- Provide Core Services and **Procurement Navigation** services for at least one **clean energy sector**.

Strand B: Expectations for Spokes

While Hubs provide foundational Core Services and Procurement Navigation within at least one climate-critical business pathway, Spokes play a critical role in addressing industry-specific barriers faced by Underrepresented Businesses. Spokes design customized, high-touch interventions that complement regional Hub Core Services and accelerate business readiness and procurement success in a defined climate-critical sector. Applicants for Spoke funding must demonstrate a clearly defined approach to delivering additional Specialized Services tailored to a specific climate-critical sector, a particular type of underserved business, or a specialized clean-energy business need and must detail how proposed supports directly respond to unique challenges of the requirements of the selected sector or the type of Underrepresented Business. While all three approaches are eligible for awards, MassCEC intends Spoke funding to primarily support sector-specific programming designed to address barriers and opportunities within defined climate-critical business pathways. Applicants should articulate how the Spoke services will differ in scope, depth, or design from the broader, cross-sector Core Services offered by the Hubs and how the

services will advance Underrepresented Businesses within the specific climate-critical business pathway or address the specialized needs of a particular type of Underrepresented Business. Applicants should identify a clear program goal and the measurable business success outcomes expected to result from the program.

Table 2. “Examples of Specialized Services from Spokes” identifies services as well as program delivery examples. Note that the example categories and supports below are not required, nor a comprehensive list and other activities may be considered for funding in alignment with proposed Spoke intervention and program goals.

Example Specialized Services	Example Supports
Procurement Navigation	Assist with identifying and applying for appropriate clean energy Procurement Opportunities such as municipal bid to install electric vehicle (“EV”) chargers or support decarbonization municipal offices
	Guide through reaching Procurement Readiness for specific opportunities such as reaching certain revenue threshold and insurance coverage to qualify to bid on a major solar-installation project
	Provide direct Matchmaking and Networking with prime vendors to increase successful attainment of subcontracts to install heat pumps on building electrification projects
Certification and Licensing	Identify the certifications and licenses needed to support heat pump installation and whole home electrification service
	Connect to training to attain necessary certifications to run energy audits
	Provide industry-specific training to enable applying for a refrigerant license
Financial Planning ⁷	Offer bridge loans and microgrants to building retrofit contractors to ensure Access to Capital and Financing
	Run targeted workshops on the tax incentives offered to diverse solar installers
	Assist loan application to enable EV charger installers or geothermal drillers Access to Capital and Financing to obtain heavy equipment to trench

⁷ Spokes focusing on Financial Planning services leading to Access to Capital and Financing will be required to adhere to the recommendations and best practices identified by the MassCEC Access to Capital grantees awarded in FY24.

Business Development	Host summits involving procurement decisionmakers running largescale retrofit projects ensuring participant connections develop into procurements
	Provide warm introductions to procurement officials overseeing bids on fleet maintenance contracts
	Connect to industry-specific networks and alliances focused on solar energy

Spokes will be expected to navigate a reasonable proportion of participating Underrepresented Businesses to reach “business ready” status and at least 70% of enrolled participants should achieve one or more approved business success outcomes, such as contracts secured, access to capital or financing, revenue growth, workforce growth, or other approved performance metrics. Since most Spokes will be focused on sector-specific Procurement Navigation directly contributing to successful procurements in climate-critical sectors, business success outcomes should generally reflect successful procurement or resulting business growth within climate-critical sectors. Spokes should also identify reasonable interim performance metrics that demonstrate meaningful progress toward procurement success, such as attaining bonding capacity, submitting a bid, or meeting the qualifications for a sector-specific preferred vendor list. Depending on the Spoke’s service model and target participants, MassCEC may approve other interim performance metrics and business success outcomes. Entry onto a preferred vendor list may be counted as a business success outcome when the list includes a formal application, screening, qualification, or approval process and provides meaningful access to climate-critical contracting or procurement opportunities.

Like Hubs, Spokes will also be expected to deploy service plans designed to ensure Underrepresented Business participants enjoy the maximum benefits of the Specialized Services. While some of the service plan components may be reliant on or supported by Hub activities, Spoke service plans should still include, but not be limited to, marketing and outreach for recruitment, management of cross-referrals from Hubs, defined eligibility criteria and intake processes, business assessments, delivery of the services, retention and follow-up, and monitoring and reporting. Spokes will also have established methods of delivery and dosages with assigned staff and partners for each step of the service plan.

Spokes are responsible for recruiting participants into their programs and should enroll Underrepresented Businesses that employ workers in climate-critical occupations or otherwise directly contribute to the design, manufacture, installation, or maintenance of clean energy and decarbonization projects. Similarly, the Specialized Services provided by a Spoke should be focused on and around sector-specific Procurement Navigation leading to opportunities that support the

highest growth climate-critical occupations. While highly tailored programs designed to support a specific type of Underrepresented Business will also be considered for funding, Applicants must clearly articulate how the approach differs from and would enhance Core Services offered by the Hub and how participating businesses will be supported to access relevant clean energy supply chains and procurement opportunities.

While primary coordination across the workforce region will be provided by Hubs, Spokes will be expected to support coordinated efforts. While Spokes may operate independently in the design and delivery of specialized programming tailored to their target sector or target business population, Spoke Applicants must demonstrate willingness to coordinate with the designated regional Hub including formal and informal communication channels, referral protocols, and shared strategies to avoid duplication and ensure regional participants have access to complementary supports. In addition to serving as specialized delivery agents focused on direct services and education to Underrepresented Businesses, Spokes will:

- Sign an MOU with the regional Hub to **take part in the cross-referral system** and refer participants to the Hub for Core Services when appropriate;
- Coordinate with the Hub to **ensure that cross-referred participants receive ongoing case management and tracking**;
- Report **performance metrics and reporting data** to both the Hub and MassCEC;
- Coordinate with MassCEC and Hubs to implement **statewide marketing and outreach campaigns and regional marketing strategies** to enhance recruitment;
- Maintain close communication with MassCEC and the Hub to ensure efforts align with state-level goals; and
- Participate in regional convenings and events led by the Hub.

Like Hubs, Spokes will be expected to have the staff capacity to administer the additional cross-referrals, case management, and collaborative participation and reporting necessary to participate in the Hub and Spoke ecosystem. Applicants are expected to demonstrate in-house clean energy expertise relevant to their proposed sector or business-type focus. If expertise is limited, Applicants must outline how they will partner with qualified, technical experts and build internal capacity to ensure delivery of industry-informed and industry-aligned services. Spokes may apply to support business participants in more than one region but will be expected to maintain the requisite staff capacity to coordinate with multiple Hubs and fulfill the reporting requirements and case load.

Strand C: Planning for Implementation of Climate-Critical Underrepresented Business Support

MassCEC seeks a regional Hub in each of the Workforce Skills Cabinet Regions and a robust network of sector-specific Spokes arrayed around each Hub to provide the comprehensive support needed for Underrepresented Businesses to grow and succeed in the clean energy sector. Planning

Grants support organizations in developing a detailed implementation plan for future Climate-Critical Underrepresented Business support programming. Planning activities may include defining the proposed Hub or Spoke role, assessing participant and market needs, identifying Core or Specialized Services, developing a service-delivery workflow, establishing performance measures, defining staffing and partner roles, and preparing an implementation budget and schedule. The final implementation plan should demonstrate how the organization could successfully launch the proposed programming and achieve measurable participant outcomes.

Organizations applying for Strand C are strongly encouraged, but not required, to submit a Letter of Intent (LOI) prior to submitting a Strand C application for funding. The LOI allows applicants to receive early feedback on alignment with the RFP's goals, priorities, and scoring criteria (including but not limited to demonstrated regional need, climate-critical sector(s) of focus, and proposed business services to be offered), before investing resources in a full application. Applicants may use this feedback to strengthen their proposals; however, submitting an LOI provides no preference or advantage in reviewing or scoring full applications. Please submit the LOI within the timelines set forth in the Workforce Data Solutions Platform to ensure adequate time for review and feedback.

Strand D: Capacity Building

Capacity Building grants support activities that strengthen an organization's ability to successfully implement, expand, pilot, or enhance Climate-Critical Underrepresented Business support programming. Eligible activities may include adding staff capacity or subject-matter expertise, expanding services into additional climate-critical sectors, enhancing Procurement Navigation capabilities, piloting a new service model or cohort, or acquiring tools, systems, or resources needed to deliver services. Applicants must clearly describe how the proposed activities will strengthen organizational capacity and improve the organization's ability to successfully implement programming, deliver services, and achieve participant outcomes. Capacity Building grants are intended to strengthen the Applicant's long-term ability to deliver programming and activities should primarily result in enhanced organizational capability, staffing, systems, expertise, or service-delivery capacity that remains with the organization beyond the grant period. Applicants proposing to use external consultants or technical experts must clearly justify the need for the engagement and demonstrate how the resulting tools, systems, processes, expertise, or other deliverables will build the Applicant's long-term organizational capacity to implement effective programming and improve services and outcomes for Underrepresented Businesses.

Coordination Expectations for Hubs and Spokes (Strands A and B)

The Hubs and Spokes within each of the seven (7) workforce regions will be required to operate as an integrated network to support Underrepresented Businesses in the clean energy sector within that region. The designated Hub and Spokes within a workforce region will be required to sign a

Memorandum of Understanding establishing cross-referral processes and standards. See Attachment 6: Sample Memorandum of Understanding.

In addition to coordination within the CUBS ecosystem, both Hubs and Spokes will be required to participate in activities that promote the hiring of graduates from MassCEC Equity Workforce Training programs to both support the labor needs of CUBS participants and to ensure the overall goals set forth within the originating Climate Legislation. This may include regional coordinated matchmaking events, hosting MassCEC-funded training organizations to present during the course of serving CUBS participants, or regularly partnering with training organizations to share graduate resumes with CUBS participants seeking to hire. MassCEC will provide available contact information for relevant Equity Workforce Training providers to facilitate these connections.

Table 3. Hub and Spoke Roles and Responsibilities, identifies roles and responsibilities that Hubs and Spokes will be expected to fulfill to ensure coordination across a workforce region. Note that the categories of activities below are not a comprehensive list and other related activities may be required.

Activity	Hub Roles and Responsibilities	Joint Responsibilities	Spoke Roles and Responsibilities
Direct Service	Provide Core Services and Procurement Navigation for at least one clean-energy sector	Cross-refer participants to ensure access to comprehensive services	Provide Specialized Services
Hub and Spoke Coordination	Act as the central coordination point for cross-referrals of participants in a designated workforce region	Participate in bi-directional cross-referral and information sharing processes and sign MOUs formalizing this process	Collaborate with the Hub to support efficient cross-referrals and participant support
Physical Location	Maintain regular in-person staffing presence (minimum two days per week)	Raise awareness of in-person support and cross-refer participants	Refer participants to in-person support when appropriate
Case Management and Tracking	Lead case management process for cross-referred participants and direct participants	Maintain an ongoing case file on each participant to ensure participant receives needed supports and reaches success	Provide case management to direct participants and collaborate with Hub when cross-referring

Performance Metrics and Reporting	Collect and report performance metrics and data to MassCEC monthly and consolidate regional data from Spokes	Consistently collect and share performance metrics and other data	Report performance metrics and data to the Hub and monthly to MassCEC
Marketing and Outreach	Develop regional marketing and outreach plans aligned with MassCEC statewide marketing	Engage with community members, employers, procurement officials and other stakeholders	Develop and implement targeted marketing and outreach strategies and participate in the rollout of regional and statewide marketing and outreach efforts
Convening	Host regional workshops and events to convene interested parties and MassCEC grantees to support goals and continuous improvement of regional approaches	Attend statewide ecosystem convenings	Participate in regional convenings and events hosted by the Hub
Feature Training Programs	Coordinate with MassCEC to feature training organizations with relevant graduates at regional events and activities to increase placement of underserved populations at clean energy companies.	Participate in regional events and activities featuring graduates of training organizations to stimulate placement of those graduates at CUBS participant companies seeking labor.	Feature training programs and/or graduates of those programs during CUBS programming and participate in regional events and activities focused on placement matchmaking.

Examples of Appropriate Programs:

MassCEC supports diverse approaches to achieving the goals of this solicitation. The examples presented below in Table 4. Examples of Application Types, are provided as an illustrative tool and do not necessarily reflect projects that MassCEC would commit to funding. See Section 13: Disclaimer & Waiver Authority of this Solicitation regarding MassCEC discretion to accept or reject applications.

Applicant Type	Examples
	A business support organization with prior experience providing all Core Services proposes providing comprehensive support to Underrepresented Businesses across its workforce region. The business

Strand A: Hub Application	support organization will partner with a local community college, with an established entrepreneurship program, to host in-person support and intake hours every day from mid-afternoon to early-evening to enable small business owners to attend without missing out on work. The business support organization brings on additional in-house staff to ensure sufficiently responsive coverage. The support organization also has prior experience providing direct Procurement Navigation coaching and mentoring to businesses interested in bidding on solar installation projects. For this example, the support organization would have to submit a Hub application noting the subcontract with the community college. If successful, the support organization would have to sign additional MOUs with awarded Spokes in its workforce region.
Strand A: Hub Application	A regional Economic Development Agency (“EDA”) and a local small business support nonprofit will collaborate to deliver Core Services across their workforce region. EDA will provide centralized administrative staff, grants administration, Business Development planning, Financial Planning workshops, and coaching from expert consultants on Operations and Management through its primary city office, while also offering rotating in-person consultation days at its primary office and two satellite offices. While EDA will identify the need through the business assessment phase and oversee the overall process, the nonprofit will sign a subcontract to provide individual Underrepresented Businesses with direct consulting hours to guide them through attaining needed SDO Certifications and Licenses. EDA will also offer Procurement Navigation into local municipal building electrification bids. In addition, EDA also has preexisting agreements with organizations focused on providing necessary training and licensing for solar project bids, and on providing advanced training on high-performance building techniques and local regulations. For this model, EDA would submit a Hub application, which notes the subcontract with the small nonprofit and reflects that subcontract in the budget, and a program design detailing the Procurement Navigation into building electrification. The other organizations providing solar and high-performance buildings would each have to submit separate Spoke applications.

Strand B: Spoke Application	A nonprofit working to expand the growing heat pump market will offer tailored technical assistance and business support to experienced heating, ventilation, and air conditioning (“HVAC”) technicians looking to transition to business ownership or enter cooperatives. The nonprofit has preexisting equity-focused pathway programs including training on ownership models, tailored one-on-one business plans with market analysis and pricing strategies, certifications, and licensing support. The nonprofit also has pipelines to connect participants to local manufacturers to learn about product-specific training. This nonprofit would submit a Spoke application. If selected, the nonprofit would have to sign an MOU with the Hub in the respective workforce region. If the nonprofit proposes serving multiple regions, the nonprofit would have to ensure sufficient staffing capacity to support cross-referrals, case management, and participation in regional efforts and sign MOUs with the respective Hubs in the regions awarded.
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Program Metrics and Reporting:

Grantees will be required to track and report participant-level data and program performance through the Workforce Development Data Solutions Platform using MassCEC templates, definitions, and reporting standards. Grantees must submit monthly reports that include required general metrics including outcomes, participant enrollment and service-delivery data, expenditure progress, and qualitative information describing program progress. Awards under Strands A, B, and D will be administered through performance-based Cost-Reimbursement Grant Agreements contingent upon timely and complete submission of required reporting and documentation. See Attachment 4: Sample Cost-Reimbursement Grant Agreement. Grantees may be required to follow corrective action plans to address performance concerns such as disproportionate spend of funds in relation to program progress or failure to demonstrate reasonable progress toward approved outcomes for business participants.

Outcome metrics are designed to reflect successful progress toward the overall goals of the Equity Workforce Program. MassCEC tracks participant-level data and outcomes for Underrepresented Business support programs using metrics including but not limited to:

Participant-level data:

- Name of Business
- Address of Business
- Business Type
- Years in Operation
- Geographic region served
- Clean energy sectors
- Customer base
- Engagement with Mass Save
- Ownership demographics including income at enrollment; Primary/Secondary languages spoken; Racial/ethnic background

- Business revenue at intake and exit
- Number of employees at intake and exit
- Certifications at enrollment and completion
- Status of business 12 months post program delivery

Performance Metrics:

- Employee Growth
- Revenue Growth
- Number/% of Underrepresented Businesses expanded into new sector/service
- Number of new Underrepresented Businesses founded
- Number/% of Underrepresented Businesses certified
- Number/% of Underrepresented Businesses added to approved vendor lists (e.g. Mass Save®)
- Number/% of Underrepresented Businesses submitting loan or financing applications (i.e. improved documentation)
- Number/% of Underrepresented Businesses developing business plans
- Number/% of bids submitted for public or private contracts
- Number/% of Underrepresented Businesses connected to CDFIs or funders
- Number/% of Underrepresented Businesses receiving capital
- Number/% of Underrepresented Businesses hiring for clean energy positions
- Number/% of Underrepresented Businesses winning new contracts and completing new contracts
- Number/% of Underrepresented Businesses winning new completing new contracts
- Number/% of Underrepresented Businesses participating in follow-up programming or alumni support

Applicants should propose internal targets for outcome achievement and should identify mechanisms for reporting and collecting follow-up data at 6-month intervals. Grantees will be expected to track and report on business outcomes during and after the program delivery period. For participants enrolled in Hub Procurement Navigation pathways and Spokes, MassCEC expects at least 70% of enrolled businesses will report one or more of the following measurable business success outcomes within six (6) months of completing program services: increased revenue; employee growth; successful entry into climate-critical sector as a new business; new contracts or subcontracts secured; new sources of capital or financing; new market or expanded customer base; or other approved positive performance metric. Inclusion on an approved preferred vendor list may also be counted as a business success outcome when the list includes a formal application, screening, qualification, or approval process or provides the participating business with meaningful access to climate-critical contracting or procurement opportunities.

Retention services and participant outcome monitoring must continue for twelve (12) months following completion of initial program services. Applicants should include retentions services as a funded program phase and account for the associated staffing, participant engagement, data collection, reporting, and other necessary costs in the proposed schedule and budget. The level of

active service delivery may vary during this period, but grantees must maintain sufficient contact to collect required outcome data and support continued progress.

For all Strands, Applicants that demonstrate prior success supported by outcome metric actuals from comparable programming may be viewed more favorably. Additionally, Applicants are encouraged to use a logic model or other program-planning tool when developing their proposed program scope of work. See Attachment 7: Sample Logic Model for an illustrative program-planning framework. Proposals should describe the specific activities and interventions that will be implemented, including what services participants will receive, how services will be delivered, who will deliver them, the anticipated frequency or level of support, and how each activity is expected to contribute to measurable participant outcomes. Broad descriptions of program goals, intended benefits, or general service categories are not sufficient substitutes for a detailed description of proposed activities.

5. FUNDING AVAILABLE

The CUBS Grants Hub and Spoke model intends to equitably allocate resources across regions while addressing the unique needs of Underrepresented Businesses. MassCEC anticipates awarding a total of up to 5 Million (\$5,000,000.00) but may increase the total awards should additional resources become available.

Applicants proposing to serve as a Hub may apply for up to Eight Hundred Thousand Dollars (\$800,000.00) in funding for work completed over a period of three (3) years. MassCEC anticipates that Hub awards will average between Six Hundred Thousand Dollars (\$600,000.00) and Seven Hundred Thousand Dollars (\$700,000.00) based on past awards, with those awards exceeding the higher end of the average being unique cases where the Applicant has demonstrated through data and evidence significant need and barriers and/or unique and impactful program models.

Applicants proposing a Spoke program may apply for up to Four Hundred Thousand Dollars (\$400,000.00) for work completed over one (1) or two (2) years. Because grantees must provide retention services and monitor participant outcomes for twelve (12) months following completion of initial program services, MassCEC anticipates that most Spoke programs will require a two-year grant period. MassCEC anticipates that Spoke awards will average between One Hundred Fifty Thousand Dollars (\$150,000.00) and Three Hundred Thousand Dollars (\$300,000.00) based on past awards. Spoke Applicants may apply for funding to provide services across multiple workforce regions, however the Applicant will be assessed for capacity and the maximum total funding request still applies.

MassCEC anticipates offering expedited application opportunities to established Hubs and Spokes in good standing and meeting performance metrics in future rounds of the CUBS Grant solicitations. These expedited application opportunities may also facilitate scaling and expansion to other regions.

Table 5. Application Thresholds by Funding Strand, outlines the funding range based on applicant type and program scope:

Application Type	Funding Term	Funding Request Range
Strand A: Hub	2 to 3 years (A year of post-program monitoring and metrics tracking is required after service delivery is complete, so Applicants should plan and budget for that obligation.)	\$400,000 - \$800,000
Strand B: Spoke	1 to 2 years (A year of post-program monitoring and metrics tracking is required after service delivery is complete, so Applicants should plan and budget for that obligation.)	\$150,000 - \$400,000
Strand C: Planning	6 months to 1 year	\$20,000 - \$50,000
Strand D: Capacity Building	1 to 2 years (For programs with participants, post-program monitoring and metrics tracking is required after service delivery is complete, so Applicants should plan and budget for that obligation.)	\$30,000 - \$150,000

Hub Applicants responding to the FY27 RFP will not be required to subgrant funds to Spokes, however Hubs will be required to collaborate with selected Spokes within their workforce region and sign MOUs with those Spokes. MassCEC reserves the right to consider Hub Applicants for Spoke awards if the proposal is more suited to fulfill the role of a Spoke. In these circumstances, the Applicant will be notified and be granted a period to submit additional supplemental documentation or decline consideration. In limited cases, MassCEC may recommend that one Hub Applicant partner with another Applicant to result in a larger and/or more effective regional Hub. In these situations, Applicants will be notified and be granted a period to collaborate and submit additional supplemental documentation to support a new collaborative proposal or decline consideration.

Funding amount decisions will take into account program variables, sector-specific barriers, and region-specific needs to ensure efficient use of funds, measurable outcomes, and alignment with

programmatic goals. Variables may include the number of Underrepresented Businesses to be served, partnership model for delivery of services, proportion of participants likely to support the highest growth climate-critical occupations, economic indicators for participants, identified regional and sector-specific barriers, geographic considerations (e.g., rural vs. urban costs), regional infrastructure, and the scale of regional operations (e.g., number of Spokes).

MassCEC will assess the reasonableness of the proposed per-participant cost in relation to the nature and scope of services, level of individualized support, program duration, anticipated participant outcomes, and requested funding. Applicants proposing higher-cost service models—more than an average of \$15,000.00 per participant—should clearly identify the primary cost drivers and explain why the proposed investment is necessary to achieve the anticipated outcomes for the identified participants.

6. ELIGIBLE FUNDING USES

Funding can support operational capacity, programmatic delivery, and ecosystem development. MassCEC anticipates these grants shall be used for activities such as:

- Staff or individual time devoted to program, or project preparation and implementation; including under one-on-one business counseling, strategic business introductions, assistance navigating government procurement processes, assisting with recruitment and retention of employees, and support accessing capital, retention services and monitoring;
- Marketing activities and expenses commonly associated with outreach initiatives such as purchasing marketing collateral, renting space for events, promotional mailers, and website or social media hosting costs;
- Technical support needed to move projects forward;
- Sector-specific training and coaching;
- Training stipends to address anticipated losses of wages or revenue that Underrepresented Businesses may incur while participating in extended training offerings;
- Wraparound Support and Support Services that mitigate barriers for participating businesses;
- Data-management systems, software, and other tools necessary for participant intake, case management, service tracking, outcome monitoring, and required reporting;
- Costs associated with initial and ongoing Underrepresented Business engagement, including translation services; and
- Administration and distribution of small grants to provide Underrepresented Businesses with capital needed for clean energy projects.

Activities that are NOT eligible for funding include:

- Costs associated with preparing a proposal;

- Support activities that have been undertaken prior to the execution of a grant;
- Purchase or lease of venue space or equipment intended for general operating purposes; and
- Staff or indirect costs outside of the allowable cost guidelines.

All Awards for Strands A, B, and D under this RFP are Cost-Reimbursement Grant Agreements. Under this agreement, the grantee is reimbursed for actual expenses incurred in the approved budget. Strand C Planning Awards are Milestone and Deliverables Grant Agreements. MassCEC reserves the right to present awardees with grant agreements that differ from the example provided. Applicants will have an opportunity to clarify specific budget needs in their application.

7. WHO IS ELIGIBLE TO APPLY?

Organizations may apply individually or as part of a partnership or team and are collectively referred to as “Applicants.” For all applications, one organization must serve as the Lead Applicant. Partner organizations that will receive grant funds or implement a defined portion of the proposed scope of work will be considered subcontractors and must be identified as such in the application and budget. The Applicant is encouraged to list other organizations and individuals not receiving a portion of the grant funds or entering into formal agreements but still contributing to the proposed work as proposed partners, indicating their roles and relevant past experience.

If selected, the Lead Applicant will sign a contract like the Attachment 5: Sample Cost-Reimbursement Grant Agreement with MassCEC and receive funds from MassCEC. The following entities are eligible to serve as a Lead Applicant with the following conditions:

- Nonprofit organizations including Chamber of Commerce organizations, trade associations, clean energy incubators/accelerators, environmental justice organizations, and organizations representing tribes;
- Academic institutions or government agencies with a business support program; and
- Nonprofit and for-profit entities such as clean energy installers, energy efficiency, or home performance contractors, technical or workforce training organizations, financial institutions, economic development entities, or other clean energy practitioners.

Additional eligibility notes:

- Lead Applicant must have a Massachusetts office and must be able to submit a Certificate of Good Standing (COGS) from the Massachusetts Department of Revenue. For more information and to obtain your COGS, please visit: <https://www.mass.gov/info-details/dor-certificate-of-good-standing-and-or-corporate-tax-lien-waiver-faqs>

- **Note:** COGS can be requested online through MassTaxConnect. COGS requested through the mail may take up to four (4) to six (6) weeks. Public post-secondary institutions are exempt from this requirement.
- Applicants who have received prior funding or are pursuing separate funding opportunities from MassCEC are eligible to apply for this funding so long as the proposed work is sufficiently distinct and does not lead to the same project being funded.
- Applicants who have received prior funding under the Equity Workforce Fund or other MassCEC funding opportunities must be in good standing with MassCEC.
- Applicants will be expected to disclose any potential conflicts of interest created through partnerships or subcontracts with related family members, current and recent employers, or any other involved parties that may create such conflicts of interest and to detail the review and selection processes used by the Applicants to ensure selection of the best parties to perform the related work.
- **Reminder:** This funding is not intended to benefit a single or limited number of Underrepresented Businesses but instead it is intended to support an organization that can help many different Underrepresented Businesses grow and excel in climate-critical business sectors.

8. ESTIMATED TIMELINE FOR CUBS SUPPORT GRANTS

This timeline is subject to change at MassCEC’s discretion, and notification timelines may vary based on the number of applications. The Pre-Application Webinar will be recorded and be made available on MassCEC’s website. Additionally, questions regarding this RFP will be collected during open Pre-Application Office Hours and posted to the MassCEC website monthly. The Workforce Development Data Solutions Platform (www.workforce.cleanenergyeducation.org) is the official source for this solicitation. Applicants are responsible for regularly reviewing the Platform and the MassCEC website (<https://www.masscec.com/funding>) for solicitation documents, application requirements, deadlines, amendments, notices, and other updates or supplemental information posted by MassCEC. Optional Strand C Letters of Intent should be submitted by the date listed in the Workforce Development Data Solutions Platform to allow sufficient time for feedback before the applicable application deadline.

Release of RFP	October 16, 2026
Pre-Application Webinar: How To Apply for CUBS RFP	November 6 , 12:00PM: Join Here
Pre-Application Office Hours	Thursday, 11/12, at 3:00PM
	Thursday, 11/19, at 5:30PM

	Thursday, 12/3, at 1:00PM Tuesday, 12/8, at 12:30PM Wednesday, 12/16, at 1:00PM Tuesday, 1/12, at 12:30PM Thursday, 1/21, at 5:30PM Monday, 1/25, at 1:00PM Tuesday, 2/9, at 5:30PM Wednesday, 2/24, at 12:30PM Wednesday, 3/17, at 12:30PM Tuesday, 3/23, at 12:30PM Thursday, 3/25, at 1:00PM Wednesday, 3/31, at 5:30PM
Questions due to MassCEC via email to CUBSBusinessSupport@masscec.com	Rolling through March 15, 2027
Proposals Due	First-Round Application Deadline: December 11, 2026, at 11:59 p.m. ET Final Application Deadline: April 2, 2027, at 11:59 p.m. ET Applicants seeking Planning funding should submit an optional Letter of Intent at least two (2) weeks before the applicable application deadline. MassCEC will make reasonable efforts to provide feedback on timely LOIs.
Initial Review and Interviews of Applicants	Scheduled as needed
Supplemental Documentation Due	Due by the deadline specified in MassCEC's request, generally within two (2) weeks
Notification of Award	March 2027, if received by December deadline July 2027, if received by April deadline

Expected Contract Execution	Four (4) to Six (6) months from application deadline.
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9. HOW TO APPLY

All applications for this Request for Proposals (RFP) must be submitted through MassCEC's Workforce Development Data Solutions Platform at:

<https://www.workforce.cleanenergyeducation.org/home>. If you encounter issues during the application process, reach out to cubsbusinesssupport@masscec.com. Applications must be fully submitted no later than 11:59 PM ET on December 11, 2026 or April 2, 2027. Applications submitted after the final deadline will not be scored.

Applicants should carefully review the Climate-Critical Underrepresented Business Support RFP, including all instructions, eligibility requirements, and required application materials available through the Workforce Development Data Solutions Platform and the MassCEC website (www.masscec.com). Applicants are strongly encouraged to attend pre-application webinars and/or office hours to learn more about program requirements and the application process, including submitting applications. Questions may be submitted on a rolling basis to cubsbusinesssupport@masscec.com.

STEP 1: REVIEW THE RFP AND AVAILABLE RESOURCES

Applicants should carefully review the Climate-Critical Underrepresented Business Support RFP, including all instructions, eligibility requirements, and required application materials. Applicants are strongly encouraged to attend pre-application webinars and/or office hours to learn more about program requirements and the application process, including submitting applications through the Workforce Development Data Solutions Platform.

Questions may be submitted on a rolling basis to cubsbusinesssupport@masscec.com.

STEP 2: ACCESS THE WORKFORCE DEVELOPMENT DATA SOLUTIONS PLATFORM

To begin an application, applicants must access the Workforce Development Data Solutions Platform at: <https://www.workforce.cleanenergyeducation.org/home>

All application materials must be completed and submitted directly through this Platform. To learn more about how to use the Platform as a prospective grantee, you can find a detailed User Guide here: <https://www.workforce.cleanenergyeducation.org/job-seeker-guide#grantees>.

STEP 3: LOG IN OR REGISTER

- **Current or existing MassCEC Workforce grantees** should log in using credentials previously provided to their organization by no-reply@careerteam.com
 - If credentials cannot be located or were not received, applicants should contact cubsbusinesssupport@masscec.com for assistance.
- New applicants must register for an account and create an organizational profile by following the on-screen instructions.

STEP 4: LOCATE THE FUNDING OPPORTUNITY

Once logged in, applicants must:

- Navigate to the **“Open RFPs”** section of the Platform, located at the top of the webpage
- Select the Climate-Critical Underrepresented Business Support funding opportunity
- Click “Apply” where you will choose which Strand you are submitting an application for.

STEP 5: COMPLETE AND SUBMIT THE APPLICATION

Applicants must complete all required application fields within the Workforce Development Data Solutions Platform and upload all required attachments as prompted. Applicants are responsible for ensuring that all required fields are completed and that all required attachments are uploaded prior to submission. The following materials are available within the Platform under **Application Materials** and must be reviewed and/or completed as applicable via the Workforce Development Data Solutions Platform:

Required Application Materials

- Attachment 1: Authorized Applicant Signature and Acceptance Form, completed through the Platform
- Attachment 2: Application Narrative, completed and uploaded through the Platform
- Attachment 3: Program Budget, completed using the required Excel template and uploaded through the Platform

Reference Materials (Provided for Review)

- Attachment 4 – Sample Cost Reimbursement Grant Agreement
- Attachment 5 – Sample Grantee Progress Report
- Attachment 6 – Sample Memorandum of Understanding
- Attachment 7 – Sample Logic Model

Applicants submitting proposals with subcontracted partners must include Letters of Commitment or Letters of Support and may include MOUs. Spoke Applicants may rely on Fiscal Agents (e.g., Regional Planning Commissions, Workforce Boards, Schools, Economic Development groups) to address administrative needs, however Applicants must have sufficient staff capacity to deliver services and provide participant case management at all stages of the service plan.

Applicants are allowed to submit multiple applications for distinct regions or programmatic approaches. Applicants proposing to operate Hubs in multiple regions must submit a separate application for each region. Applicants applying to operate Spokes in multiple regions may submit a single application if the work does not significantly vary per region, but Applicants must submit separate applications for *distinct* projects or regions, if the proposed work necessitates a different service plan per region or if different services or sector-focuses will be offered in different regions.

MassCEC may deem a proposal a stronger fit for other solicitations or for collaboration with other Hub and Spoke Applicants, including selecting one or part of a proposed network of partners. All requests for additional information and/or authorization to consider an application under additional procurement or funding opportunities will be clearly communicated, and Applicants will be given a defined timeline to respond to requests and provide supplemental documentation. Applicants are encouraged to proactively submit concurrent applications to open solicitations.

At the discretion of MassCEC, applications for CUBS Grants that are not detailed enough for initial award or need further development may be offered a planning grant or capacity building grant, and if funding is available, an opportunity to reapply in a later round of CUBS Grants for implementation. Planning grants are intended for the exploration, development, or refinement of innovative potential implementation initiatives, while capacity building grants are designed to enable organizations to add key capacity needed to support programming to service Underrepresented Businesses entering and growing in climate-critical sectors.

Additionally, MassCEC may elect to award a portion of CUBS Grant funds requested by Applicants in their applications in the event a proposed project contains sufficient detail to merit a CUBS Grant but does not have a sufficient scope to justify the entire amount of the award request.

Hub applicants responding to this FY27 CUBS Grants RFP will not be required to subgrant funds to Spokes. All Spokes must apply directly via separate applications and will receive grant funds directly from MassCEC, if awarded.

Program Budget:

Applicants must provide a standard line-item program budget using a MassCEC template representing the full term of the proposed project, including staff salaries, direct program costs, support services and subcontracting costs, indirect costs and fringe costs. Each line-item should include rates and units/quantities, as well as detailed narratives that align with the proposed activities described in the application. If multiple similar tasks are planned, each unique task with an assigned rate should be detailed on a separate line; for example, if two (2) different types of stipends are being offered to participants, each stipend should be reflected on a separate line under Support Services.

All line-items must be explained in the narrative column. For example, if applying for personnel funds, include the units (Full-Time Equivalent or hours) and rate (annual salary or wage) as well as the period of time (total months or years) and program responsibilities and title for each staff person. Please note that while the budget form asks for names and titles for staff, applicants may elect to provide titles only.

Cost sharing is not required however Applicants are encouraged to demonstrate a commitment to leveraging MassCEC funding through confirmed funding or in-kind contributions. Cost share is defined as monetary or in-kind costs supporting the proposed grant program. Cost share cannot include other grants from MassCEC. Proposals with greater levels of relevant and confirmed cost sharing may be prioritized during the selection process. Any voluntary cost share included in a program budget may be incorporated into the grant agreement and will be subject to applicable tracking and reporting requirements.

Applicants will have an opportunity to clarify specific budget needs in their application. All Applicants selected for an award will be able to submit final, revised budgets for approval before contract execution.

Staff, Fringe, and Indirect Cost Rates

Applicants should propose staff compensation that reasonably reflects each employee's responsibilities, anticipated level of effort, and role in delivering the proposed program. In reviewing proposed compensation costs, MassCEC may consider the Applicant's established compensation practices and other relevant benchmarks and may request additional information or documentation supporting the proposed rates and levels of effort. Staff costs must align with documented wages and salaries and cannot be fully loaded rates that organizations associate with the value of specific services provided by staff.

Fringe rates must reflect both existing benefits and costs, as well as projected costs. Fringe benefit rates may vary by staff position when supported by the Applicant's established compensation practices. Applicants must clearly identify and explain each rate used in the proposed budget. Applicants must be willing to provide additional details about the breakdown of current and anticipated fringe costs.

Indirect expenses are costs necessary for an organization's overall operations that cannot be readily identified with a single program or activity, such as general administration, utilities, office space, or administrative personnel supporting multiple programs. Indirect costs charged to a MassCEC grant must be reasonable, necessary, allocable to the funded program, and clearly identified separately from direct program costs in the proposed budget and financial reports.

Applicants may apply an indirect cost rate of up to fifteen percent (15%) to direct salary and fringe expenses. The indirect cost rate may not be applied to materials, subcontractors, equipment, or other cost categories. Applicants with a current federally negotiated indirect cost rate agreement ("NICRA") may request approval to apply a higher rate to a nonfederal MassCEC award by

submitting the current NICRA and written justification with the application. Any exception is subject to MassCEC review and approval before execution of a Grant Agreement.

Indirect costs may not include capital purchases or improvements, entertainment, alcohol, lobbying, or other costs prohibited under applicable federal or Commonwealth standards. Depreciation on capital assets may be included in an allowable indirect-cost pool, but the purchase cost of the asset may not be charged as an indirect cost. Subcontractors and subrecipients must comply with the same indirect-cost restrictions unless otherwise approved by MassCEC.

Subcontractors

Applicants intending to allocate thirty percent (30%) or more of the total proposed program budget to a single subcontractor, or Fifty Thousand dollars (\$50,000) or more to a single subcontractor, must submit a separate, detailed budget for that subcontractor using the provided budget template.

Organization Budget:

Applicants are required to provide an annual organizational operating budget along with the proposed program budget. Key features of an operating budget include the lead applicant's projected revenue and expenses and top-level expense categories such as salaries, operational expenses, and administrative overhead.

Proposed Project Schedule-Timeline and Phases:

Applicants will provide a proposed project schedule organized by program phase and time period. Each phase should identify the applicable months, proposed activities, and performance metrics. Phases may overlap and must cover the full grant period, including retention, outcome monitoring, and reporting. The proposed budget must reasonably align with the timing, activities, staffing needs, and expected level of effort identified for each program phase.

Resources and Support for Potential Applicants:

All applicants are encouraged to utilize MassCEC support when preparing an application. Attendance at the pre-application webinar and office hours is recommended.

MassCEC will offer a publicly accessible contact list of organizations seeking partnerships and their geographic and occupational interest areas for those seeking partnership opportunities. MassCEC may also seek to facilitate relationships directly upon request. If you would like to be added, email WFDTraining@masscec.com.

Electronic Accessibility:

If accessibility to a computer, internet, or software may prohibit you from submitting an electronic application, in general, or by any deadline, or if there are other challenges with accessibility, such

as language or writing barriers, alternative options may be discussed, such as video application. Please email CUBSBusinessSupport@masscec.com or telephone the Workforce Equity Program Administrator at (617) 315-9300, option 7, option 3, to discuss accommodations.

10. SELECTION CRITERIA

Proposals submitted in response to this solicitation will be reviewed by MassCEC including a threshold and compliance screening and a review committee. MassCEC reserves the right to request additional information from any Applicant. MassCEC will consider the following categories when evaluating the strengths and weaknesses of proposals:

<u>Applicant Experience and Qualifications</u>	• Applicant demonstrates experience engaging and recruiting Underrepresented Businesses and has a network established to attract existing Underrepresented Businesses. • Applicant demonstrates experience in fostering partnerships and collaboration. • Applicant has a track record of providing services to help Underrepresented Businesses overcome typical barriers or sector-specific barriers, such as back office services, bridge and startup capital, or introductions to procuring agencies. • Applicant includes documented outcomes from comparable programming that demonstrate historical success. • Applicant has experience or subject-matter knowledge of climate-critical business fields. • Applicant has staff, systems, and organizational capacity to administer a cost-reimbursement award. • Applicant demonstrates experience in the target region.
	• Applicant clearly identifies the

<u>Target Climate-Critical Sectors / Demonstration of Market Opportunity</u>	climate-critical business fields , occupations, projects, procurement opportunities, or supply chains that participating businesses will enter, serve, or support. • Applicant uses data or research to demonstrate the importance or growth of a sector to meet state climate goals. • Applicant demonstrates credible connections to procurement pipelines and customers integrated into the project so that trained Underrepresented Businesses have business opportunities during or at program completion. • Applicant clearly identifies the Underrepresented Businesses to be enrolled including applicable sectors, business characteristics, and stages of development. • Applicants plan to serve predominantly Underrepresented Businesses that directly participate in the design, manufacturing, installation, and maintenance of clean energy projects and that provide climate-critical employment opportunities. • Proposed recruitment and service model reflects the economic conditions, market opportunities, and business support needs of the region or regions to be served.
	• Applicant has clearly outlined gaps in current services for Underrepresented Businesses and has a strong plan and strategy to fill gaps and needs. • Applicants present a clear account of services and training to be offered

<u>Program Design and Service Delivery</u>	including detailed descriptions of the specific activities and interventions proposed. • Applicants present a clear delivery and dosage model for each offering, including defining staff and partner roles and responsibilities. • Applicants propose reasonable performance metrics to gauge success of delivery of Core or Specialized Services. • Program includes high-touch, individualized support and explains how any workshops, cohorts, peer-learning activities, or group services will be supplemented by assistance appropriate to individual business needs. • Applicant presents a clear service workflow covering outreach, recruitment, intake, eligibility determination, assessment, service planning, service delivery, referrals, retention, follow-up, and monitoring. • Applicants articulate how their programs align with the Hub and Spoke delivery model. • Applicants emphasize collaboration or openness to collaboration with other organizations and clearly signals willingness to support coordination and cross-referral systems if awarded.
	• Applicants demonstrate staff capacity to provide one-on-one supports. • Applicant presents clear processes for referrals and participant handoffs between Hubs, Spokes, and other relevant service providers.

<u>Participant Case Management, Outcomes, and Reporting</u>	• Hub Applicants provide a staffing plan that accounts for administration and management of the Hub and Spoke ecosystem in the designated workforce region, including cross-referrals with Spokes, case management, collection and collation of participation and performance data from Spokes, and reporting to MassCEC. • Applicants incorporate continuous improvement planning with clear reporting processes for tracking outcomes, collecting data, and refining program delivery based on feedback. • Applicant proposes clear, measurable performance metrics that reflect the services delivered and the intended participant success outcomes aligned with clean energy market entry or growth. • Applicant demonstrates capacity to collect and report participant-level data. • Hub Applicants distinguish the performance measures applicable to participants receiving Core Services from the business-success outcomes applicable to participants enrolled in the Hub’s procurement services pathway. • Applicant includes a 12-month retention and outcome-monitoring period following initial program services.
	• Applicants present a budget aligned with program needs and a reasonable per-participant cost for the type and intensity of programming and services the applicant proposes.

<u>Budget, Program Phases, Leveraged Resources, and Sustainability</u>	• Applicants include itemized budgets for subcontractors if applicable. • Proposed budget covers the grant period. • Proposed staff compensation is reasonable, adequately supported, and appropriately aligned with the activities, responsibilities, and staffing needs described in the application. • Applicants leverage and take advantage of existing government and other resources and/or demonstrates progress towards identifying appropriate funds to leverage in the initial award period and to sustain the programming beyond the grant period.
<u>Diversity of Approaches</u>	• Diverse Applicants and Applicant Teams are encouraged to apply, especially those certified by the Massachusetts Supplier Diversity Office or equivalent certifying entity. If the Applicant organization meets the criteria for this but has not completed certification, Applicants may offer a statement to this regard on the application form. • Geographic Diversity: Consideration may be given towards awarding applications from a representative spread of communities across Massachusetts. Based on current coverage by existing awardees, consideration may be given to proposals focused on areas currently lacking coverage. • Sector Diversity: Consideration may be given towards awarding applications from a variety of high-priority, climate-critical business sectors that have high

	growth opportunity in MA. • Heightened and Innovative Support: Consideration may be given towards Applicants proposing heightened and innovative supports not offered by other programs, such as social supports removing childcare barriers or addressing food or housing insecurity potentially faced by small business owners or Applicants proposing innovative ways to address common growth barriers faced by Underrepresented Businesses.
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11. EXPECTATIONS FOR GRANT AWARDEES

In addition to fulfilling Project Plan and Timeline described in the Scope of Work, to be agreed upon and finalized upon award, awardees will be expected to satisfy the following responsibilities:

1. Finalize Grant Agreement

Awardees will work with the MassCEC Program Manager to develop and finalize their grant agreement to ensure that the statement of work, project plan, timeline and other terms are in conformity to MassCEC standards prior to commencement of project work and disbursements of funding.

2. Attend Awardee Cohort Sessions and Training

Awardees must send at least one representative to participate in regular webinars and meetings to promote networking, synergize projects, share best practices, and strengthen the quality of the workforce and business development ecosystems related to climate-critical occupations. Cohort meetings and training sessions will be offered on an ongoing basis, and Awardees are expected to participate regularly.

3. Consult with MassCEC Workforce Technical Assistance

MassCEC will provide technical assistance via staff with workforce development and climate critical occupation-related experience and may provide technical assistance (“TA”) via the services of a subcontracted provider. Technical assistance will consist of guidance and support during implementation, networking opportunities and partnership development assistance, and promoting continuous improvement to ensure the success and quality of the programs. Technical assistance will be delivered on an ongoing and as-needed basis.

For budgeting purposes, Applicants should consider that active grantees will likely need to participate in at least 20 hours of TA every six months the grant is active. MassCEC will host one in-person full-day TA session each year, and Applicants should consider the associated travel cost. Applicants may plan for multiple people to participate in the various TA offerings, especially if it will provide opportunities for staff or staff from partner organizations to advance the efforts of the grant.

4. Provide Monthly Reporting and Case Studies

Awardees will be required to submit monthly programmatic and participant-level reports through the Workforce Development Data Solutions Platform using MassCEC templates, definitions, and reporting standards. Reports will include required general metrics, participant enrollment and service-delivery data, qualitative program updates, expenditure progress, and participant outcomes such as changes in revenue, employment, contracts, customers, financing, certifications, licenses, and other approved performance measures, as applicable. Awardees must maintain current reporting and must submit updated reports with each reimbursement request.

MassCEC will review reported performance and expenditure progress throughout the grant period, with each invoice and against designated Go/No-Go review points in the Scope of Work program phases. These reviews may consider progress against approved program phases, enrollment and completion targets, performance metrics, reporting requirements, and expenditures relative to demonstrated progress. Based on these reviews, MassCEC may require corrective action, restrict activities or reimbursement associated with subsequent program phases until identified deficiencies are addressed, or exercise other rights available under the Grant Agreement.

MassCEC regularly features awardees in social media blog posts, reports, and other media. To facilitate these activities, awardees will be expected to provide case studies and the regular reports as agreed upon in the Scope of Work. At a minimum, case studies will be expected to include a one (1) page text description of a successful program participant and an appropriate accompanying picture, with additional information, statistics, and photographs potentially requested by the MassCEC Program Manager. It is anticipated that case studies will be required on at least an annual basis.

12. CONTACT INFORMATION FOR QUESTIONS

For all questions related to this CUBS Grant RFP, please email CUBSBusinessSupport@masscec.com.

13. GENERAL REQUEST FOR PROPOSALS CONDITIONS

NOTICE OF PUBLIC DISCLOSURE

As a public entity, MassCEC is subject to Massachusetts' Public Records Law, codified at Chapter 66 of the Massachusetts General Laws. Any documentary material, data, or other information received by MassCEC from an applicant is a public record subject to disclosure. Applicants shall not send MassCEC any confidential or sensitive information in response to this RFP. If confidential information is submitted as part of the application and not clearly marked as confidential, such information may be made publicly available by MassCEC without further notice to the Applicant.

DISCLAIMER & WAIVER AUTHORITY

This RFP does not commit MassCEC to award any funds, pay any costs incurred in preparing a response to this RFP, or procure or contract for services or supplies. MassCEC reserves the right to accept or reject any or all applications received, waive minor irregularities in submittal requirements, modify the anticipated timeline, request modification of the application, negotiate with all qualified Applicants, cancel or modify the RFP in part or in its entirety, or change the application guidelines or requirements, when it is in MassCEC's best interests. No individual other than the contacts identified in this RFP is authorized to provide information or respond to questions concerning this RFP.

This RFP has been distributed electronically using MassCEC's website. It is the responsibility of Applicants to check the website for any addenda or modifications to an RFP to which they intend to respond. MassCEC accepts no liability and will provide no accommodation to Applicants who submit an application based on an out-of-date RFP document.

Applicant's response to this RFP shall be treated by MassCEC as an accurate statement of Applicant's capabilities and experience. If any statement contained in Applicant's response proves to be inaccurate, such inaccuracy shall constitute sufficient cause for rejection of the response or termination of any resulting contract.

CONTRACT REQUIREMENTS

Upon MassCEC's authorization to proceed with the proposal, MassCEC and the awarded applicant(s) will execute a contract, substantially in the form of the Sample Agreement attached hereto as Attachment 4 which will set forth the respective roles and responsibilities of the parties. The awarded applicant(s) will be expected to execute a contract within 120 days of notification of award. If the contract is not executed within 120 days of the award notification, MassCEC reserves the right to rescind the award.

ATTACHMENT 1: AUTHORIZED APPLICANT SIGNATURE AND ACCEPTANCE FORM

Climate-Critical Underrepresented Business Support Grants (the “RFP”)

The undersigned is a duly authorized representative of the Applicant named below. The undersigned has read and understands the RFP requirements and acknowledges and confirms that the Applicant and each member of its team have read and understand the RFP Requirements. The undersigned acknowledges and agrees that all of the terms and conditions of the RFP are mandatory.

The undersigned and each Applicant and each member of its team acknowledges and agrees that (i) all materials submitted as part of the application are subject to disclosure under the Massachusetts Public Records Law, as explained in the RFP; (ii) that the Massachusetts Clean Energy Technology Center (“MassCEC”) has no obligation, and retains the sole discretion to fund or choose not to fund the application set forth herein; and (iii) that MassCEC’s receipt of the application does not imply any promise of funding at any time.

The undersigned and each member of the Applicant’s team understands that, if the Application is selected by MassCEC pursuant to this RFP, the Applicant will execute and deliver an agreement to be provided by MassCEC that shall set forth the terms and conditions, together the respective roles and responsibilities of the Applicant, and each member of its team, and MassCEC, with respect to the project described in the RFP.

I certify that the statements made in this Application, including all attachments and exhibits, are true and correct.

Applicant: _____

(Printed Name of Applicant)

By: _____

(Signature of Applicant or Authorized Representative)

Title: _____

Date: _____

ATTACHMENT 2: CUBS GRANT APPLICATIONS

Attached separately

ATTACHMENT 3: PROGRAM BUDGET

Attached separately

ATTACHMENT 4: SAMPLE COST REIMBURSEMENT GRANT AGREEMENT

Attached separately

ATTACHMENT 5: SAMPLE GRANTEE PROGRESS REPORT

Attached separately

ATTACHMENT 6: SAMPLE MEMORANDUM OF UNDERSTANDING

Attached separately

ATTACHMENT 7: SAMPLE LOGIC MODEL

Attached separately