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## **Home Modernization Navigator RFP Questions & Responses**

### 1. What is the ideal organization to apply?

As stated in the RFP, Applicants may be companies/non-profits with multiple employees, sole proprietors, or individuals. Applicants are encouraged to partner with other organizations to provide complementary expertise that a single entity may not possess.

Applicants must have a strong understanding of and background in engagement with renters, landlords, low- and moderate-income residents, and Environmental Justice Populations; program implementation; developing and maintaining seamless customer journeys; translation and transcreation; technical expertise; and knowledge about incentives and financing available to residential customers in Massachusetts.

### 2. Are you looking for an organization with a fully scaled customer inbound/outbound call/email/chat center, or would you entertain a new entity?

MassCEC does not require applicants to have fully scaled customer support from the start. The Navigator will launch in targeted geographies to allow applicants to build capacity by hiring, reallocating, or contracting with staff, as necessary, and training staff to work on the Home Modernization Navigator. However, as stated in the RFP, MassCEC seeks a partner that can move quickly to have the Program in the field and adjust dynamically based on real-world results. MassCEC anticipates that top Applicants will be able to launch at least some Home Modernization Navigator services in Phase 1 Geographies within one to two months of signing a contract with MassCEC. MassCEC anticipates that the Program will continue to evolve and expand over the course of Phase 1.

### 3. What is the minimum sized operation that you could imagine being successful with this RFP?

There is no minimum size for applicants. If you refer to the Scope of Work described in Section 7 of the RFP, MassCEC is seeking Applicants that will be able to have at least 3,000 Residential Customer engagements and at least 9,000 hours of Home Modernization Navigator staff time spent on Residential Customer engagements within the first year of launching the Program.

Applicants may hire, reallocate, or contract with staff to work on the Home Modernization Navigator, as necessary. Applicants are encouraged to partner with other organizations to provide complementary expertise that a single entity may not possess.

4. Are there any limitations on the number of project partners an entity can have?

There are no limitations on the number of Project Partners. In evaluating an Applicant and their Project Partners, MassCEC will consider whether the partnership has a history of collaboration and a clear structure for collaboration.

5. Can you elaborate on the expected outcomes and metrics for success outlined in the proposal, particularly regarding energy and emissions reductions?

Expected program metrics for the Navigator are listed in Task 1.1. MassCEC has not set specific deliverables or metrics for Residential Customer energy or emissions reductions for the Navigator to achieve. Broadly, the Navigator's work will contribute to the state's residential building sector sublimit for greenhouse gas emissions reduction goals. See the state's [Clean Energy and Climate Plans](#) for more information on the sector sub-limits. MassCEC aims for the Navigator to support Residential Customers in reducing their home's energy consumption and greenhouse gas emissions through electrification, efficiency, and renewable energy projects. However, MassCEC also recognizes that the nature of the Navigator's services will make it difficult to directly attribute energy and emissions reductions to this work, so we have selected other metrics.

6. Will there be multiple awardees to fulfill the scope of services? Please confirm whether only one applicant team will be awarded the scope of Phase 1 for both the city of Lowell and Springfield.

MassCEC will award the Phase 1 scope for both Lowell and Springfield to only one Applicant. MassCEC anticipates contracting with the Phase 1 selected Applicant for the statewide expansion (Phases 2, 3, and 4), subject to the successful implementation of the previous phases and the availability of funds.

7. Does MassCEC have a vetted list of professional translation services providers that can be shared?

MassCEC does not have a vetted list of professional translation services providers.

8. Does MassCEC have a preferred CRM tool to store, track, and manage data.

MassCEC does not have a preferred customer relationship management (CRM) system.

9. Will MassCEC act as a facilitator for qualified applicants who possess complementary expertise but might not have been aware of each other's interest in applying, thereby fostering potential partnerships?

At this time, MassCEC does not plan to be a facilitator between applicants but may flag potential partnerships to pair complementary consultant expertise, as appropriate.

10. Does the budget include any consumer incentives?

The budget does not include any incentives for Residential Customers.

11. What role will utilities play in each phase of this project?

Staff from the utilities have provided input in the design of the Home Modernization Navigator, particularly how the Navigator will maintain open channels of communication and coordination with other residential decarbonization programs, such as Mass Save's incentive and financing programs, including the HEAT Loan and Mass Save's Income Eligible and Enhanced Residential offers, as well as non-Mass Save utility incentive programs (e.g., Connected Solutions, SMART). The selected Applicant should expect to establish a point of contact at the utilities and other relevant entities to facilitate coordination and referrals. Additionally, to the extent practicable, the Navigator should work with the utilities to collect a Residential Customer's utility account number and gain permission to track participation in Mass Save utility rebate programs.

12. Is the budget inclusive of all outreach and marketing?

The budget is inclusive of all outreach and marketing for the Navigator.

There will also be targeted outreach in Springfield as part of a state-funded climate marketing campaign, so the selected Applicant should plan to coordinate with this campaign, which may bring Residential Customers to the Navigator, depending on the timing of the two efforts.

MassCEC has a separate budget for outreach and marketing of the Clean Energy Lives Here campaign. To the extent that the Navigator is integrated into the Clean Energy Lives Here website, especially when it expands statewide, outreach and marketing for the Clean Energy Lives Here campaign may also drive Residential Customers to the Navigator.

13. What specific role will the cities of Springfield and Lowell ("Phase 1 Geographies") play in this program? Will any outreach channels be made available to reach eligible consumers, specifically the cities of Springfield and Lowell? For example, are there email or mailing lists, or current mailers that information can be inserted into?

The Home Modernization Navigator will begin offering services in targeted geographic areas that will include, at a minimum, the Cities of Springfield and Lowell. Springfield and Lowell have

existing Mass Save Community First Partnership and EmPower Massachusetts campaigns. MassCEC expects the Navigator to partner with these initiatives as well as community-based organizations and municipal governments in the Phase 1 Geographies, who do not need to be included as Project Partners in the Application (see response to Question 6). MassCEC anticipates that the Navigator will collaborate with these entities for outreach and can help facilitate these partnerships, though the level of partnership will ultimately depend on the capacity and goals of these entities.

There will also be targeted outreach in Springfield as part of a state-funded climate marketing campaign, so the selected Applicant should plan to coordinate with this campaign.

14. Will the selected vendor only be paid on an hourly basis or can applicants propose alternative structures (total by project component, by consumer advised, etc.)?

Applicants should submit a budget proposal for payment on an hourly basis with limits per Task. For the selected Applicant, MassCEC may consider written requests for adjustments of the overall budget breakdown between Tasks during the implementation of the Navigator. In addition to the budget proposal on an hourly basis, MassCEC will also accept alternative budget structures with an explanation for why the alternative structure is preferred.

15. If the billable hours exceed the budget in year one, will the year two budget kick-in?

The selected Applicant may not expand into the Phase 2 budget for Phase 1 operations; however, with MassCEC's approval, final timing and timeline for Phase 2 could begin sooner than one year, subject to the results of Phase 1.

As stated in Section 6 of the RFP, subject to the successful implementation of Phase 1 and the availability of funds, MassCEC *anticipates* subsequently contracting with the selected Navigator for an additional Three Million Five Hundred Thousand Dollars (\$3,500,000) for each of Phases 2, 3, and 4, as detailed in Section 7. Contracting with the Phase 1 selected Applicant is likely but not guaranteed for Phase 2.

Per Task 1.3 of Section 7 of the RFP, applicants may propose formats that cap available support from the Navigator, so that if demand for its services significantly exceeds the proposed resources, Residential Customers are not frustrated by unexpected lack of response. If demand for Navigator support exceeds the available capacity and budget of the selected Applicant, the issue should be flagged in the monthly update required under Task 1 and the volume of unanswered inquiries should be tracked. MassCEC must approve any strategies to cap the available support from the Navigator before Program launch.

16. Could we provide a digital self-serve pathway in addition to phone calls in order to save the same purpose?

As stated in Task 1.3 of Section 7 of the RFP, applicants should propose customer-centric formats for assistance that offer user-friendly ways for Residential Customers to receive building decarbonization support. Potential formats could include, *but are not limited to*, email, phone calls, video calls, phone or video scheduled consultations, chat, social media, moderated forums, or in-person office hours (e.g., at a library).

Although MassCEC is open to creative ideas for using technical innovations, like artificial intelligence, the Applicant should design systems where Residential Customers are able to connect with a human quickly without having to go through multiple prompts.

17. Under “Residential Customer Tracking & Follow Up,” MassCEC expressed an interest in collecting demographic data. Beyond Mass Save, are there programs that might already collect this data for which data sharing agreements could be put in place between the Navigator and the relevant program?

MassCEC is open to the selected Applicant forming data-sharing agreements with other programs, such as Mass Save Community First Partners. As appropriate, MassCEC will help facilitate these conversations but cannot guarantee access to this data.

18. In addition to working with community-based organizations for targeted outreach, will the Navigator have access to meter/utility bill data to target outreach based on consumption patterns? Alternatively, will the Navigator have access to targeting tools based on meter/utility bill data?

The selected Applicant may work with relevant utility companies to explore whether it is possible to do targeted outreach based on consumption patterns. As appropriate, MassCEC will help facilitate these conversations, but we cannot guarantee the outcome of those conversations, and we know that utilities must be very cautious when considering any type of data sharing or targeted outreach of their customers.

For engaged Residential Customers, the Navigator should coordinate with utilities to collect their utility account number and gain permission to track participation in Mass Save utility rebate programs, to the extent practicable.

Please see the response to Question 11 above for more information on the role of utilities in the program.

MassCEC also wants to highlight that, as stated in Section 1 of the RFP, Phase 1 will include targeted outreach strategies to increase the usage of the Navigator, especially among previously underserved Residential Customers, including renters, landlords, low- and moderate-income residents, non-English speakers, and Environmental Justice Populations.

19. Are the Residential Customer Engagement targets listed in the deliverables section of Task 1.3 cumulative? I.e., is the expectation for a total of 3,000 Residential Customer Engagements within months 1-12?

Yes, the Residential Customer engagement deliverables for Phase 1 are cumulative.

20. Is there flexibility on the project implementation timeline to allow for system development and deeper community relationship building?

As stated in the RFP, MassCEC is seeking a partner that can move quickly to have the Program in the field and adjust dynamically based on real-world results. Top Applicants will be able to launch at least some Home Modernization Navigator services in Phase 1 Geographies within one (1) to two (2) months of signing a contract with MassCEC, although MassCEC anticipates that the Program will continue to evolve and expand over the course of Phase 1.

Per Task 1.5 of Section 7 of the RFP, MassCEC anticipates that the selected Applicant will draft a Statewide Expansion Plan (Phase 2) within six months of contract signing and have a finalized Statewide Expansion Plan, based on feedback from MassCEC, within eight months of contract signing.

If the Applicant believes that a different timeline than stated in the RFP is necessary, they may propose a timeline adjustment or alternative in their application with an explanation for why the adjustment or alternative is preferable.

21. What is the level of engagement that constitutes a “residential customer engagement?”

Could it be defined as any resident who responds to outreach efforts by expressing interest in learning about the program and providing their address and contact information? Or do they need to communicate with the Navigator to qualify?

The Navigator must communicate individually with a Residential Customer and provide information in response to an inquiry for the interaction to qualify as a Residential Customer engagement. Information provided by the Navigator includes planning and ongoing support through a customer’s decarbonization journey, answers to technical questions, advice navigating incentives and financing, best practices for contractor engagement, and advice on decisions between products and vendors (comparing options to achieve the Residential Customer’s needs, not recommending specific products or contractors), etc. Find further details under “Supported Measures” in Task 1.3 of Section 7 of the RFP.

22. What qualifies as “time spent on customer engagements”? Is this actual time communicating with the customer or does it also count the additional work that it takes to prepare for and follow up on those communications?

Hours of Navigator staff time spent on Residential Customer engagements includes the direct communication as well as the preparation and follow-up time for those engagements.

23. The RFP says you cannot do things that benefit specific contractors. Does this exclude the potential of building partnerships with for-profit community-selected vendors, such as Mass Save Home Performance Contractors working in the Community First Partnership, or solar companies executing a solarize-type campaign, where pricing is standardized? The intention would be to (a) expand outreach reach and (b) ensure customers they are already serving are being directed to the Navigator Services for things beyond their services.

The selected Applicant can promote the Navigator's services to contractors, installers, and tradespeople so they can leverage it as a resource for their customers. The Navigator may also highlight existing community-selected vendors, but MassCEC does not expect the Navigator to develop new preferred vendor partnerships.

24. Relatedly, the RFP says that money can be spent on local partnerships. Can this include the potential of working creatively with the above community-selected vendors? For example, could they be compensated for making referrals to the Navigator?

The selected Applicant can propose allocating some of the budget to existing community-selected vendors in their application. MassCEC will consider these funding partnerships on a case-by-case basis after considering input from relevant local entities.