



## Request for Proposals: Home Modernization Navigator

Date of Issue: March 13, 2024

Proposals Due: April 10, 2024

Funding Available:

Phase 1: \$2,250,000

Pending Success of Prior Phase/s & Availability of Funds  
Potential Funding for Phases 2, 3, and 4: \$3,500,000 each  
Total Potential Funding for Phases 1-4: \$12,750,000

All proposals must be submitted to:

[buildings@masscec.com](mailto:buildings@masscec.com)

## 1. SUMMARY

With funding from the Massachusetts Executive Office of Energy and Environmental Affairs (“EEA”), the Massachusetts Clean Energy Technology Center (“MassCEC”) is seeking entities to apply (“Applicants”) to assist owners and occupants of one-to-four-unit residential buildings (“Residential Customers”) in reducing their home’s greenhouse gas emissions. This entity will be referred to as the “Home Modernization Navigator,” or the “Navigator,” and the effort will be referred to as the “Program.” MassCEC is seeking a partner that can identify effective strategies (e.g., emails, phone calls, video calls, office hours) to help Residential Customers navigate electrification, efficiency, and renewable energy projects. Assistance is not anticipated to include in-home visits or assessments. MassCEC anticipates that the Navigator will leverage the informational resources and platform of [Clean Energy Lives Here](#), as well as other resources and program offerings. The Navigator will coordinate with other residential decarbonization programs in Massachusetts to the greatest extent possible to improve the experience of the Residential Customer and avoid duplication.

This Request for Proposals (“RFP”) seeks proposals for up to \$12.75 million for up to four (4) potential phases of work:

- Phase 1 (Initial Program Implementation): With a budget of up to \$2,250,000, MassCEC seeks Applicants that can quickly and nimbly offer Home Modernization Navigator services in targeted geographic areas that will include, at a minimum, the Cities of Springfield and Lowell (“Phase 1 Geographies”).<sup>1</sup> 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.<sup>2</sup> This budget is intended to fund the Home Modernization Navigator in the Phase 1 Geographies from contract signing through the start of Phase 2, which is targeted for no later than July 1, 2025. As part of Phase 1, the selected Applicant will also complete a proposal for a Phase 2 expansion statewide, and, if approved by MassCEC, prepare for a statewide expansion in Phase 2.
- Phase 2 (Statewide Program Expansion): Subject to approval from MassCEC and the availability of funds, MassCEC would fund the selected Applicant to expand Home Modernization Navigator services statewide with a projected budget of up to \$3,500,000. MassCEC anticipates that top Applicants would be able to expand Navigator

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<sup>1</sup> These municipalities were selected because they have a high percentage of Environmental Justice block groups and they both have existing Mass Save Community First Partnership and EmPower Massachusetts campaigns. Additionally, there will be targeted outreach in Springfield as part of a state-funded climate marketing campaign. The selected Applicant should plan to coordinate with the community groups running these campaigns. Subject to MassCEC approval, the selected Applicant may launch in other municipalities in addition to Cities of Springfield and Lowell and/or to expand to other municipalities at some point during Phase 1.

<sup>2</sup> As defined by the as defined by the Massachusetts Department of Energy and Environmental Affairs (EEA) Environmental Justice Policy. <https://www.mass.gov/doc/environmental-justice-policy6242021update/download>

services statewide no later than the start of July 1, 2025, although final timing and timeline would be subject to the results of Phase 1.

- Phase 3: Subject to the successful implementation of Phase 2 and the availability of funds, MassCEC would fund the selected Applicant to continue offering Home Modernization Navigator services statewide with additional funding of up to \$3,500,000.
- Phase 4: Subject to the successful implementation of Phase 3 and the availability of funds, MassCEC would fund the selected Applicant to continue offering Home Modernization Navigator services statewide with additional funding of up to \$3,500,000.

MassCEC reserves the right to add additional funding to the Program or extend the Program.

MassCEC seeks Applicants who will be able to quickly implement initial components of the Program in the Phase 1 Geographies and dynamically adjust and expand the Program to serve the entire state in subsequent phases, subject to the availability of funds. Massachusetts prioritizes equity in the transition to a clean energy economy. Top Applicants will be able to design and deploy the Program to serve the needs of all types of Residential Customers in the Commonwealth, with a priority focus on renters, low- and moderate-income residents, non-English speakers, and Environmental Justice Populations. Applicants should be able to provide support on the full range of home electrification, efficiency, and renewable energy solutions. Topics for support include planning/coordination, technical questions, incentives and financing, contractor engagement, and purchasing decisions.

## 2. ABOUT MASSCEC

MassCEC is a quasi-state economic development agency dedicated to accelerating the growth of the clean energy sector across the Commonwealth to spur job creation, deliver statewide environmental benefits and to secure long-term economic growth for the people of Massachusetts. MassCEC works to increase the adoption of clean energy while driving down costs and delivering financial, environmental, and economic development benefits to energy users and utility customers across the state.

MassCEC's mission is to accelerate the clean energy and climate solution innovation that is critical to meeting the Commonwealth's climate goals, advancing Massachusetts' position as an international climate leader while growing the state's clean energy economy. MassCEC is committed to creating a diverse, equitable, and inclusive organization where everyone is welcomed, supported, respected, and valued. We are committed to incorporating principles of diversity, equity, inclusion, and environmental justice in all aspects of our work to promote the equitable distribution of the health and economic benefits of clean energy and support a diverse and inclusive clean energy industry. MassCEC strives to lead and innovate in equitable clean energy and climate solutions.

### 3. PROGRAM CONTEXT AND GOALS

#### PROGRAM CONTEXT

In the [Clean Energy and Climate Plan for 2050](#), published in December 2022, the Commonwealth sets ambitious climate goals for buildings, with a 93% greenhouse gas emission reduction in 2050 relative to 1990 levels.<sup>3</sup> The plan identifies the development of a building decarbonization clearinghouse to streamline meeting consumer needs as one (1) strategy to meet these climate targets. The state is currently in the process of evaluating the best model for setting up the clearinghouse with support from a consulting contract with VEIC. Investments in “no-regrets” efforts, like the Home Modernization Navigator, will test strategies to inform clearinghouse work and address decarbonization needs in the near- and medium term.

#### PROGRAM GOALS

The goals of the Program are for the Home Modernization Navigator to:

- Help Residential Customers implement home decarbonization measures, leveraging available financing and incentives and connecting Residential Customers to other residential decarbonization program offerings. The Navigator should maintain open channels of communication and coordination with other residential decarbonization programs to the greatest extent possible to improve the experience of the Residential Customer and avoid duplication.
- Test and refine approaches and resources to provide customer-centric building decarbonization support on technical questions and navigating available incentives and financing. The Home Modernization Navigator’s support should be designed and refined to serve all types of Residential Customers in the Commonwealth, with a priority focus on landlords/renters, low- and moderate-income residents, and Environmental Justice Populations.
- Test and refine strategies for targeted outreach of underserved populations, including landlords/renters, low- and moderate-income residents, and Environmental Justice Populations, to ensure equitable access to the Home Modernization Navigator’s services, building on Mass Save’s Community First Partnerships and MassCEC’s EmPower Massachusetts programs.
- Gather data on interest and usage of Home Modernization Navigator services, as well as feedback on the effectiveness of these services.
- Gather data on what topics Residential Customers have questions about, including data on current “pain points” or obstacles to decarbonization as well as key steps to success.

<sup>3</sup> <https://www.mass.gov/doc/2050-clean-energy-and-climate-plan/download>. Page 55.

## 4. ELIGIBILITY

Applicants may be companies/non-profits with multiple employees, sole proprietors, or individuals. Applicants are encouraged to partner with other organizations (“Project Partners”) to provide complementary expertise that a single entity may not possess. For example, one Project Partner may have more experience with technical expertise, and another Project Partner may have more experience with translation.

The selected Applicant will be expected to partner with community-based organizations and municipal governments in the Phase 1 Geographies, but those entities do not need to be included as Project Partners in the Application. In fact, because any selected Applicant would be required to partner with these entities and MassCEC does not want to burden these entities during the application stage, MassCEC does not expect community-based organizations and/or municipal governments from Phase 1 Geographies to be included as Project Partners.

Teams with multiple entities should have one (1) entity that is responsible for organizing the team and proposal (“Lead Applicant”). For the sake of this RFP, the term “Applicant” may refer to either a single entity or a Lead Applicant with one (1) or more Project Partners. Individual entities may apply as part of multiple teams. MassCEC will contract with the Lead Applicant.

Given the complexity of the Program, Applicants must have a strong understanding of all the areas of expertise listed below.

- **Engagement with renters, landlords, low- and moderate-income residents, and Environmental Justice Populations:** Applicants should have experience with successful outreach to and meaningful engagement with renters, landlords, low- and moderate-income residents, community-based organizations, and Environmental Justice Populations.
- **Program implementation:** Applicants should have a demonstrated history of successfully delivering equitable and inclusive programs, including implementing programs that serve renters, landlords, low- and moderate-income residents, non-English speakers, and Environmental Justice Populations; managing budgets and timelines; writing reports; hiring and training new staff; and quickly developing informational technology and customer relationship management solutions to track program metrics.
- **Customer-centered approach:** Applicants should have a background in developing and maintaining seamless customer journeys, particularly for renters, landlords, low- and moderate-income residents, community-based organizations, and Environmental Justice Populations. Applicants should have experience designing user-friendly engagement tools shaped by a data-driven approach.
- **Translation and Transcreation:** For Phase 1, Applicants should have the experience and capability of offering access to all Home Modernization Navigator services and materials in English, Spanish, Khmer, and Portuguese, based on the most commonly spoken languages in

the Phase 1 Geographies.<sup>4</sup> The language access approach to Phase 2 will be finalized during Phase 1, but Applicants should be prepared to offer all Home Modernization Navigator services in Spanish, and propose an approach that ensures language accessibility (e.g., through the use of translators) for other commonly spoken languages in Massachusetts, including, at a minimum, Portuguese, Chinese, Haitian Creole, Vietnamese, and Khmer.

- **Technical Expertise:** Applicants should possess familiarity with all residential decarbonization measures included in Clean Energy Lives Here and listed below (“Decarbonization Solutions”) so that they can answer questions related to the technology, navigating incentives and financing, best practices on contractor engagement, and deciding between products and vendors. Applicants should include current staff that possess this expertise and the ability to train new staff on these topics.
  - Weatherization
  - Air-Source Heat Pumps
  - Ground-Source Heat Pumps
  - Solar Electricity, including Community Solar
  - Solar Hot Water
  - Heat Pump Water Heaters
  - Battery Storage
  - Battery-powered Outdoor Equipment
  - Heat Pump Clothes Dryer
  - Induction Cooking
  - Buying Clean Electricity
  - Electrical Service Upgrades
  - Electric Bicycles
  - Electric Vehicles & Electric Vehicle Charging
- **Knowledge about available incentives and financing:** Applicants should be familiar with existing and upcoming utility, local, state, and federal incentives available to Residential Customers in Massachusetts.

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<sup>4</sup> More information about the languages spoken in the Cities of Springfield and Lowell is available in this map: <https://mass-eoeaa.maps.arcgis.com/apps/webappviewer/index.html?id=dffdbf9c109647fc9601f7524c1fd9f4>

## 5. ESTIMATED RFP TIMELINE

This timeline is subject to change at MassCEC’s discretion.

Release of RFP	March 13, 2024
Questions due to MassCEC via email to <a href="mailto:buildings@masscec.com">buildings@masscec.com</a>	March 29, 2024
Questions with Answers Posted to MassCEC Website	April 2, 2024
Proposals Due	April 10, 2024
Interviews of Top Applicants	Late April 2024
Notification of Award and Contracting	May 2024

## 6. BUDGET

MassCEC anticipates initially contracting with the selected Home Modernization Navigator for up to Two Million Two Hundred Fifty Thousand Dollars (\$2,250,000) to implement Phase 1 of the Program, as detailed in Section 7. 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. While MassCEC is not setting specific budget amounts or limits for each Task described in Section 7, the majority of the budget for each Phase should be allocated to the “Residential Customer Decarbonization Support” tasks. MassCEC suggests that Applicants leave at least Fifty Thousand Dollars (\$50,000) in each Phase for miscellaneous or unexpected tasks that may arise over the course of the Program.

The proposed budget should reflect the Applicant’s proposed approach. Additionally, Applicants may propose additional Tasks beyond those described in Section 7, but the scope and cost of those additional tasks should be clearly and separately outlined in the budget proposal.

MassCEC anticipates that the Home Modernization Navigator will be paid for time (billed hourly) and materials, not to exceed an agreed upon maximum per Task. MassCEC may consider written requests for adjustments of the overall budget breakdown between Tasks.

MassCEC may elect to provide additional funding and/or extend the duration of the Program, at its sole discretion.

## 7. SCOPE OF WORK

MassCEC seeks Applicants who will be able to quickly implement initial components of the Program and dynamically adjust and expand the Program based on initial results. The Tasks below—especially the Phase 2 Tasks—are intentionally broad to allow Applicants input in how they would approach these Tasks and to recognize that these Tasks may evolve and shift over the course of the Program.

### TASK 1.1: PHASE 1 PROGRAM MANAGEMENT & REPORTING

Track and evaluate the implementation of the Program and provide monthly updates to MassCEC and EEA on Program implementation.

- Evaluate program impact by:
  - Administering follow-up surveys so that all Residential Customers receive a follow-up survey after each engagement, allowing participating Residential Customers to give feedback on the Program.
  - Periodically convene focus groups (minimum of four) of Residential Customers, community members, technical assistance providers, and other stakeholders to discuss their feedback on the Program and suggestions for improvement. Focus group participants should be offered a stipend as compensation for their time.
  - To the extent it is possible to access Mass Save and other program data, tracking Residential Customers' follow up, such as rebate and loan applications submitted.
- Attend weekly check-ins with MassCEC.
- Track Program metrics and provide monthly written updates (in brief memo or slide format) that will include the following proposed key performance metrics. At MassCEC's sole discretion, the written updates may be shifted to quarterly. As part of their proposal, Applicants may propose alternative or additional metrics.
  - Total number of staff members and total number of full time equivalent ("FTE") staff members from the selected Applicant providing Home Modernization Navigator services to Residential Customers.
    - Number of multi-lingual staff members and FTEs broken out by language/s spoken.
    - Number of racial minority staff members and FTEs broken out by race and ethnicity.
  - Total number, duration, and a short description of trainings conducted to prepare employees for successfully engaging previously underserved Residential Customers, including renters, landlords, low- and moderate-income residents, non-English speakers, and residents of Environmental Justice Populations.
  - Number and format of Residential Customer engagements
    - Percentage of Residential Customer engagements conducted in a non-English language, by language.



- Percentage of Residential Customer engagements for homes located in Environmental Justice<sup>5</sup> block groups.
  - Number and format of Residential Customer follow-ups and successful re-engagements.
    - Percentage of Residential Customer re-engagements conducted in a non-English language, by language.
    - Percentage of Residential Customer re-engagements for homes located in Environmental Justice block groups.
  - Number of employees of Applicants and Project Partners working on the Program and the percentage of their time dedicated to this Program.
  - Topics of Residential Customer engagements (absolute number and as a percentage of total engagements).
  - Number of follow-up surveys administered and/or focus groups convened and a summary of the results.
  - Qualitative list of “pain points” or obstacles to decarbonization identified during Residential Customer engagements.
  - Qualitative lessons learned on providing decarbonization support to Residential Customers.
  - Planned or implemented modifications to the Program.
- Compile a final Program summary within one month of the end of Phase 1 that synthesizes the monthly reports and provides a monthly and total value for each of the metrics listed above, as well as a synopsis of lessons learned and any Program modifications. Memo format or slides are acceptable.

**Deliverables:**

- Weekly check-in meetings with MassCEC
- Monthly or quarterly written Program metrics updates, as determined by MassCEC
- Phase 1 summary

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**TASK 1.2: PHASE 1 PROGRAM DEVELOPMENT & LAUNCH**

Prepare the infrastructure, systems, and staff necessary to launch the Program in Phase 1 Geographies. 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.

- Finalize a plan for the implementation of Phase 1, based on refining the proposed approach in the Application with input from MassCEC and other relevant stakeholders.

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<sup>5</sup> For a map of Environmental Justice Populations in Massachusetts, see: <https://www.mass.gov/info-details/environmental-justice-populations-in-massachusetts>

MassCEC anticipates that Home Modernization Navigator services may be launched in stages to allow scaling up.

- Prepare systems and protocols to offer and track Residential Customer engagements and the Program metrics outlined in Task 1.1.
- Transcreate the content of the Clean Energy Lives Here website into Portuguese and Khmer, similar to the Spanish-language version of Clean Energy Lives Here: <https://goclean.masscec.com/es/>. Note: MassCEC's contractor for the Clean Energy Lives Here campaign will use this transcreated content to build Portuguese and Khmer versions of Clean Energy Lives Here.
- As needed, based on gaps in existing Clean Energy Lives Here resources identified through the Navigator's work, develop or translate resources and tools for Residential Customers. New resources, tools, and translations will be approved on a case-by-case basis by MassCEC.
- As necessary, hire, reallocate, or contract with staff to work on the Home Modernization Navigator.
- Train staff to provide Home Modernization Navigator services to Residential Customers.
  - Include trainings on how to engage previously underserved Residential Customers, including renters, landlords, low- and moderate-income residents, non-English speakers, and Environmental Justice Populations.
  - Include trainings on all Decarbonization Solutions, including the technology, navigating incentives and financing, best practices on contractor engagement, and deciding between products and vendors.
- Subject to MassCEC approval, the selected Applicant may launch in other municipalities in addition to Cities of Springfield and Lowell and/or to expand to other municipalities at some point during Phase 1. Funding under this task may be used to expand the Program's infrastructure, systems, and staff during Phase 1.

#### **Deliverables:**

- Finalized plan for launching program in Phase 1 Geographies (i.e., at a minimum Springfield and Lowell), including staffing levels, translation approach, format of Home Modernization Navigator services offered (e.g., email, phone call, etc.), and template Home Decarbonization Plan. This plan will build from the approach proposed in the Application, and the selected Applicant should plan to incorporate at least one round of feedback from MassCEC.
- Transcreated Portuguese and Khmer versions of the content on the Clean Energy Lives Here website.
- As needed and approved by MassCEC, resources, tools, and translations for Residential Customers.
- Train adequate staff to implement Phase 1 of the Program, ensuring adequate multi-lingual staff and translators are available.

- Prepare infrastructure, systems, and protocols to offer and track Home Modernization Navigator services during Phase 1, potentially including expanding the Program during Phase 1.

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### TASK 1.3: PHASE 1 RESIDENTIAL CUSTOMER DECARBONIZATION SUPPORT

Provide support (e.g., emails, phone calls, video calls, office hours) for Residential Customers in Phase 1 Geographies seeking to reduce their home’s greenhouse gas emissions through electrification, efficiency, and renewable energy. Support should encompass an overview of building decarbonization options and how decarbonization relates to customers’ priorities and needs, technical questions, guidance on contractor engagement, and navigating available incentives and financing.

- **Supported measures:**

- Applicants should be prepared to support all Decarbonization Solutions (as defined in Section 4 (Eligibility)). Support on these measures includes:
  - Answering technical questions.
  - Navigating incentives and financing applicable to individual customers.
  - Offering best practices on contractor engagement.
  - Advising on decisions between products and vendors (The Home Modernization Navigator will provide advice on how to compare options to achieve the Residential Customer’s needs and will not recommend specific products or contractors.).
  - Providing ongoing support through customers’ decarbonization journey.
- In addition to the individual Decarbonization Solutions, Applicants should also offer Residential Customers a customized home decarbonization plan that includes the suggested timing and contingencies of different home decarbonization measures (“Home Decarbonization Plan”). All Residential Customers should be offered the opportunity to complete a home decarbonization plan, either as part of the intake process or as a follow-up to their engagement.
  - The [Clean Energy Home Plan](#) on MassCEC’s Clean Energy Lives Here website is one example of a customized home decarbonization plan but does not need to be used as a template for these plans.
- Applicants should also be prepared to provide advice and guidance about other factors that impact Residential Customer energy utility bills, including qualifying for a low-income rate code, signing up for fuel assistance, understanding municipal aggregation, and navigating competitive electric supply options.
- Applicants should plan to coordinate with and refer Residential Customers to other residential decarbonization programs. The Navigator should maintain

open channels of communication and coordination with other residential decarbonization programs to the greatest extent possible to improve the experience of the Residential Customer and avoid duplication. Relevant programs and entities include:

- Mass Save’s incentive and financing programs, including the HEAT Loan and Mass Save’s Income Eligible and Enhanced Residential offers.
- Non-Mass Save utility incentive programs (e.g., Connected Solutions, SMART).
- Solar for All incentives
- MassCEC’s residential electric vehicles advising services.
- Massachusetts Community Climate Bank.

The selected Consultant should work to establish a point of contact at each of the above-mentioned entities and other relevant entities to facilitate coordination and referrals.

- Applicant should plan to work with MassCEC on how to integrate the Home Modernization Navigator services into Clean Energy Lives Here and other public facing messaging and outreach.

- **Format**

- 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).
  - Any non-written communication (e.g., phone calls and video calls) should include follow-up notes to the Residential Customer with a summary of the issue discussed, the recommendation, and relevant follow-up information.
  - Although, MassCEC is open to creative ideas for using technical innovations like artificial intelligence, the Applicant should design systems where Residential Customers can connect with a human quickly without having to go through multiple prompts.
  - Applicants should include how they would serve Residential Customers with limited or no internet access.
- The selected applicant will work with MassCEC to integrate the offerings into MassCEC’s [Clean Energy Lives Here](#) website.
- Applicants should propose formats thoughtfully to serve the needs of all residents of the Commonwealth, starting first with renters, landlords, low- and moderate-income residents, and Environmental Justice Populations.

- Applicants may propose formats that cap the available support from the Home Modernization Navigator, so that if demand for Home Modernization Navigator services significantly exceeds the proposed resources, Residential Customers are not frustrated by unexpected lack of response. For example, Applicants may propose a limited number of scheduled consultation slots or the chance to submit an email question to an “Ask an Expert” forum with clear expectation that only some questions will be selected. If demand for Home Modernization 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. Any strategies to cap the available support from the Home Modernization Navigator must be approved by MassCEC before Program launch.
- Applicants should be prepared to modify the format of the Home Modernization Navigator services and/or offer new options based on initial results.
- **Residential Customer Tracking & Follow-Up**
  - To enable the reporting required in Task 1, all Residential Customer engagements should be tracked, including the format of the engagement, the duration, and the subject. Any obstacles to decarbonization that surfaced during the engagement should be noted.
  - To the extent practicable, all Residential Customers should provide basic information and basic data, including email address and address of the one (1) to four (4) unit building under discussion.
    - Additionally, to the extent practicable, the Navigator should collect a Residential Customer’s utility account number and gain permission to track participation in Mass Save utility rebate programs.
    - As a secondary priority, the Home Modernization Navigator should also evaluate opportunities for additional data collection for some or all Residential Customers, including which decarbonization measures the customer has already installed and demographic data, including age, number of household members, income, race, and ethnicity.
  - The Navigator should store data so that it can readily access information on past engagements for a given Residential Customer (although the data may be indexed to the address or a [unique building identifier](#) instead of to the individual Residential Customer).
  - As appropriate, Residential Customers should be informed of the opportunity to re-engage for further assistance.
  - The Home Modernization Navigator should test different approaches to follow-up with Residential Customers after the initial engagement.
  - Where data sharing is possible and to the extent feasible, the selected Applicant should integrate data from other customer relationship management tracking workflows (e.g., Community First Partnership) to inform the Navigator’s engagements and tracking.

- **Translation & Transcreation**
  - For Phase 1, Applicants should be prepared to offer access to all Home Modernization Navigator services and materials in Spanish, Portuguese, and Khmer, in addition to English.
  - Additionally, within the Phase 1 Geographies, Applicants should plan to reach out to the local installer and contractor community and develop relationships with installers and contractors who speak Spanish, Portuguese, and Khmer.

**Deliverables:**

- At least 150 Residential Customer engagements and at least 450 hours of Home Modernization Navigator staff time spent on Residential Customer engagements within the first month of launching the Home Modernization Navigator Program.
- At least 600 Residential Customer engagements and at least 1800 hours of Home Modernization Navigator staff time spent on Residential Customer engagements within the first three (3) months of launching the Program.
- 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.
  - At least 10% of these engagements conducted in a non-English language.
  - At least 90% of these engagements will be for homes located in Environmental Justice block groups.<sup>6</sup>
  - At least 20% of these Residential Customers will have received some type of follow-up outreach or engagement.

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**TASK 1.4: PHASE 1 TARGETED OUTREACH**

Test targeted outreach strategies in the Phase 1 Geographies to increase the usage of the Navigator, especially for previously underserved Residential Customers including renters, landlords, low-and moderate-income residents, non-English speakers, and Environmental Justice Populations.

- In Springfield and Lowell, the selected Home Modernization Navigator should work with the Mass Save Community First Partners and MassCEC EmPower Massachusetts grantees. As stated in Section 4 (Eligibility), these entities do not need to be included in the Application as Project Partners, but some of the budget could be allocated directly to these entities and/or other community-based based organizations.
- Targeted outreach strategies may include a wide range of approaches, including but not limited to peer-to-peer ambassadors; landlord ambassadors; attendance of local events;

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<sup>6</sup> Based on Mass GIS data (<https://www.mass.gov/info-details/massgis-data-2020-environmental-justice-populations#downloads->), 96.1% of Lowell residents and 100% of Springfield residents live in Environmental Justice block groups. This target is set slightly lower to allow potential flexibility to expand beyond these two municipalities, but the intention for Phase 1 is to focus on Environmental Justice Populations.

informational sessions with existing local energy ambassador and coaches, as well as other local community-based organizations; a storefront location; and radio, television, online, and out of home marketing.

- Funding may be provided directly to community-based organizations and community members that are either listed as Project Partners in the Application or otherwise identified by the Applicant during the Program.
- Applicants should test non-English (i.e., Spanish, Portuguese, and Khmer) language outreach strategies.
- Applicants should test outreach strategies to engage renters and landlords.
- Targeted outreach strategies to promote the Home Modernization Navigator will be coordinated with MassCEC's existing marketing and outreach promoting the Clean Energy Live Here resources, as well as the state's climate campaign.

**Deliverables:**

- Finalized targeted outreach plan, building on what is submitted in this Application. The selected Applicant should plan to incorporate at least one round of feedback from MassCEC.
- Plan should be updated after the first three (3) months of launching Phase 1 of the Program. Update should include at least one (1) round of feedback from MassCEC.
- Other deliverables to be determined based on selected outreach strategies.

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**TASK 1.5: FINALIZED STATEWIDE EXPANSION PLAN & PHASE 2 PREPARATION**

Within six (6) months of contract signature, the Home Modernization Navigator should develop a plan to serve the entire state ("Statewide Expansion Plan").

- The Statewide Expansion Plan should be based on an anticipated budget of \$3,500,000 for one (1) year's worth of Navigator services. MassCEC reserves the right to add additional funding to the Program or extend the Program.
- MassCEC currently anticipates that the Statewide Expansion Plan should cover Fiscal Year 2026 (i.e., July 2025 through June 2026).
- The plan should include the proposed approach for expanding the Home Modernization Navigator statewide, including:
  - Format of Home Modernization Navigator services offered (e.g., email, phone call, etc.)
  - Translation/language access approach: Applicants should be prepared to offer all Home Modernization Navigator services in Spanish. The selected Applicant should propose an approach that ensures language accessibility (e.g., through the use of translators) for other commonly spoken languages in Massachusetts, including, at a minimum, Portuguese, Chinese, Haitian Creole, Vietnamese, and Khmer.
  - Approach to Residential Customer tracking and follow-up
  - Targeted outreach: Proposed targeted outreach strategies to increase the usage of the Navigator, especially for previously underserved Residential

Customers including renters, landlords, low-and moderate-income residents, non-English speakers, and Environmental Justice Populations. The Statewide Expansion Plan may include a continued focus on the Phase 1 Geographies for targeted outreach.

- Budget allocation
- Staffing plan
- The selected Applicant should plan to incorporate at least one round of feedback from MassCEC.
- Pending approval of the Statewide Expansion Plan by MassCEC, the Navigator may spend funds under this Task to prepare the infrastructure, systems, and staff necessary for implementing Phase 2.

**Deliverables:**

- Draft Statewide Expansion Plan (within six (6) months of contract signing).
- Finalized Statewide Expansion Plan based on feedback from MassCEC (within eight (8) months of contract signing).
- Subject to approval from MassCEC, train adequate staff to implement Phase 2 of the Program, ensuring adequate multi-lingual staff and translators.
- Subject to approval from MassCEC, prepare infrastructure, systems, and protocols to offer and track Home Modernization Navigator services during Phase 2.

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**TASK 1.6 PHASE 1 MISCELLANEOUS**

MassCEC suggests that Applicants leave at least Fifty Thousand Dollars (\$50,000) for miscellaneous or unexpected tasks that may arise over the course of Phase 1.

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**TASK 2.1: PHASE 2 PROGRAM MANAGEMENT & REPORTING**

Track and evaluate the implementation of the Program and provide monthly updates to MassCEC and EEA on Program implementation.

- Evaluate program impact in accordance with the Statewide Expansion Plan.
- Attend weekly check-ins with MassCEC.
- Track Program metrics and provide monthly written updates (in brief memo or slide format) that will include the same key performance metrics as Phase 1 unless, otherwise specified in the Statewide Expansion Plan.
- Compile a final Program summary within one month of the end of Phase 2 that synthesizes the monthly reports and provides a monthly and total value for each of the metrics from Phase 1, as well as a synopsis of lessons learned and any Program modifications. Memo format or slides are acceptable.

**Deliverables:**

- Weekly check-in meetings with MassCEC
- Monthly or quarterly written Program metrics updates, as determined by MassCEC



- Phase 2 summary

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#### TASK 2.2: PHASE 2 CONTINUED PROGRAM DEVELOPMENT

Although MassCEC anticipates that most of the work to prepare for the launch of Phase 2 will have been completed under Phase 1, MassCEC anticipates that additional efforts to evolve and expand the staff, infrastructure, systems, resources, and protocols necessary to implement Phase 2 will continue throughout Phase 2.

##### **Deliverables:**

- As approved by MassCEC, evolve and expand staff, infrastructure, systems, resources, and protocols to offer and track Home Modernization Navigator services during Phase 2.

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#### TASK 2.3: PHASE 2 RESIDENTIAL CUSTOMER DECARBONIZATION SUPPORT

Provide support (e.g., emails, phone calls, video calls, office hours) for Residential Customers in the entire state of Massachusetts seeking to reduce their home’s greenhouse gas emissions through electrification, efficiency, and renewable energy. Support should encompass an overview of building decarbonization options and how decarbonization relates to customers’ priorities and needs, technical questions, guidance on contractor engagement, and navigating available incentives and financing.

- **Supported measures:** Similarly to Phase 1, Applicants should be prepared to support all Decarbonization Solutions and offer Residential Customers a Home Decarbonization Plan. Applicants should plan to continue coordinating with other relevant entities.
- **Format:** Applicants should propose customer-centric formats that build on the lessons learned from Phase 1 and were approved in the Statewide Expansion Plan. Applicants should be prepared to modify the format of the Home Modernization Navigator services and/or offer new options based on initial results of Phase 2.
- **Residential Customer Tracking & Follow-Up:** Applicants should plan to conduct similar tracking and follow-up to Phase 1.
- **Translation:** Applicants should be prepared to offer all Phase 2 Home Modernization Navigator services through staff that are fluent in Spanish and ensure language accessibility for other commonly spoken languages in Massachusetts, including, but not limited to, Portuguese, Chinese, Haitian Creole, Vietnamese, and Khmer, in accordance with the Statewide Expansion Plan.
- **Timeline:** Top applicants will be prepared to begin Phase 2 by the start of FY26 or sooner.

##### **Deliverables:**

- Deliverables to be determined in the Statewide Expansion Plan.

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#### TASK 2.4: PHASE 2 TARGETED OUTREACH

The selected Applicant will deploy targeted outreach, as approved in the Statewide Expansion Plan, to increase the usage of the Navigator support, especially for previously underserved Residential Customers including renters, landlords, low-and moderate-income residents, non-English speakers, and Environmental Justice Populations.

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#### TASK 2.5: PHASE 2 MISCELLANEOUS

MassCEC suggests that Applicants leave at least Fifty Thousand Dollars (\$50,000) for miscellaneous or unexpected tasks that may arise over the course of Phase 2.

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#### TASK 3: PHASE 3

Subject to the successful implementation of Phase 2 and the availability of funds, MassCEC would fund the selected Applicant to continue offering Home Modernization Navigator services statewide with additional funding of up to \$3,500,000. MassCEC anticipates that this Phase would entail similar tasks to Phase 2 (i.e., program management & reporting, continued program development, Residential Customer decarbonization support, targeted outreach, and other miscellaneous tasks), subject to the outcomes and lessons learned from Phase 2.

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#### TASK 4: PHASE 4

Subject to the successful implementation of Phase 3 and the availability of funds, MassCEC would fund the selected Applicant to continue offering Home Modernization Navigator services statewide with additional funding of up to \$3,500,000. MassCEC anticipates that this Phase would entail similar tasks to Phase 2 (i.e., program management & reporting, continued program development, Residential Customer decarbonization support, targeted outreach, and other miscellaneous tasks), subject to the outcomes and lessons learned from Phase 3.

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#### ADDITIONAL TASKS

As budget allows, Applicants may propose additional scopes for the Home Modernization Navigator Program that they believe would enhance the Program.

## 8. HOW TO APPLY

MassCEC must receive responses to this RFP no later than Wednesday, April 10, 2024 at 5:00 PM ET. Only complete, timely proposals will be considered. MassCEC, at its sole discretion, may determine whether an application is complete. The submission must be in electronic form, submitted via email to [buildings@masscec.com](mailto:buildings@masscec.com). Proposals should be in a single PDF document. "Home Modernization Navigator" must appear in the email subject line.

Please include in your proposal:

- **Attachment A:** Authorized Applicant's Signature and Acceptance Form

- **Attachment B:** Application Form
  - Narrative describing qualifications listed in Section 4 (Eligibility)
  - Proposed approach to tasks described in Section 7 (Scope of Work)
  - Budget for each task, including an hourly rate table for staff that will work on this scope of work
- Resumes of all participating individuals, including from Project Partners
- Up to three (3) relevant work samples

Please review and be prepared to sign **Attachment C** (Sample Agreement). Any requested change to Attachment C (Sample Agreement) should be noted in Attachment B (Application Form), which shall be negotiated at MassCEC’s sole discretion.

## 9. SELECTION CRITERIA

Applicant proposals will be evaluated on the following criteria:

- **Completeness of Proposed Approach**
  - Does the Applicant plan to provide services commensurate with the Tasks requested by MassCEC in Section 7?
  - Has the Applicant’s proposed approach demonstrated insight into the Program goals?
- **Experience and Qualifications**
  - To what extent does the Applicant demonstrate the eligibility criteria outlined in Section 4?
  - Has the Applicant successfully completed projects similar or relevant to the proposed work?
  - Does the Applicant have experience and qualifications to develop an approach that will serve all Residential Customers in the Commonwealth, including renters, landlords, low- and moderate-income households, and Environmental Justice Populations?
  - Does the Lead Applicant or any of the Project Partners have Supplier Diversity Office (“SDO”) certification as a diverse business enterprise or meet the criteria for any of the diverse business enterprises certified with the SDO but have not completed certification with the SDO?
- **Cost Competitiveness**
  - How do the Applicant’s hourly rates compare to other Applicants?
  - How does the scale and quality of the proposed scope compare to other Applicant’s proposed scale and quality?
- **Overall Quality of Proposal**

- Does the Applicant demonstrate an understanding of the concepts and motivators underlying the Program?
- Has the Applicant demonstrated an ability to meaningfully engage and communicate effectively with Residential Customers, especially a diverse array of homeowners, landlords, and tenants?
- Has the Applicant demonstrated sufficient creativity and flexibility to support the Program?
- **Project Partners (if applicable):**
  - Does the partnership have a history of collaboration?
  - Does the partnership have a clear structure for collaboration?

## 10. CONTACT INFORMATION FOR QUESTIONS

[buildings@masscec.com](mailto:buildings@masscec.com)

## 11. GENERAL REQUEST FOR PROPOSALS CONDITIONS

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### 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. Thus, 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.

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### DISCLAIMER & WAIVER AUTHORITY

This RFP does not commit MassCEC to award any funds, pay any costs incurred in preparing an application, 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, when it is in MassCEC's best interests.

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.

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## CONTRACT REQUIREMENTS

Upon MassCEC's authorization to proceed with the proposal, MassCEC and the awarded applicant(s) will execute a contract which will set forth the respective roles and responsibilities of the parties.