



Request for Proposals: Program Manager for Electrify Northampton-Easthampton

Date of Issue: April 29, 2024

Proposals Due: May 24, 2024

Total Funding Available: \$500,000

(Note: At least \$150,000 of this funding is reserved for
participant incentives)

All proposals must be submitted to:

buildings@masscec.com

I. SUMMARY

This Massachusetts Clean Energy Technology Center (“MassCEC”) Request for Proposals (“RFP”) seeks one (1) or more entities to apply (the “Applicants”) to act as an implementation partner for the Electrify Northampton-Easthampton campaign. This role will be referred to as the “Program Manager.”

Specifically, this RFP is seeking a Program Manager to complete the Tasks detailed in Section VI (Scope of Work), including:

- Managing logistics relevant to the implementation of the campaign including administration of financial incentives to participating moderate income Northampton and Easthampton residential building owners and landlords (the “Participants”);
- Conducting targeted outreach to potential Participants;
- Providing co-delivery of weatherization and electrification to Participants, including conducting an initial home energy assessment and managing the implementation of Participants’ weatherization, heat pump, and electrical upgrade projects, as well as any necessary barrier mitigation and other electrification projects that Participants wish to pursue;
- Performing targeted air sealing using a blower door for Participants’ buildings; and
- Tracking metrics and writing up quarterly and final reports.

II. 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 in order 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.

III. PROGRAM GOALS AND DESCRIPTION

As part of Eversource’s settlement to buy Columbia Gas, Eversource committed Five Hundred Thousand Dollars (\$500,000) to support electrification efforts in the communities of Northampton and Easthampton (the “Communities”). MassCEC will award this funding on behalf of the Department of Energy Resources (“DOER”) in consultation with representatives from both municipalities.

The Electrify Northampton-Easthampton campaign will use this funding to support building decarbonization of small residential buildings (1-4 units) (the “Project Sites”) owned by eligible Participants (i.e., moderate income residents (with household income between 60% to 80% of state median income) or landlords with tenants of any income level). Building decarbonization means transitioning buildings away from the combustion of fossil fuels. The Commonwealth’s dominant building decarbonization strategy is maximizing energy efficiency and electrifying thermal demands.¹

This campaign will specifically target eligible Participants that indicate interest in installing heat pumps. Selected Participants will each receive approximately \$1,300 (exact amount to be determined based on the number of Participants agreed upon by MassCEC and the Program Manager that will receive the services described in Task 3) towards heat pump installation. Participants will also receive co-delivery of weatherization and heat pumps, including an initial home energy assessment, coordination of weatherization (including targeted air sealing), heat pump, and electrical contractors, and support in accessing all available rebates and financing. The goal of this campaign is to accelerate the adoption of heat pumps and other decarbonization measures by moderate income households and landlords in the Communities, while testing a decarbonization delivery model that could be scaled to other cities and towns in the state.

MassCEC has a total budget of Five Hundred Thousand Dollars (\$500,000) for Electrify Northampton-Easthampton. At least One Hundred Fifty Thousand Dollars (\$150,000) of that budget shall be used to offer incentives or discounts to Participants that move forward with heat pump installation. See Section XI (Budget) for more details on how the remaining funds shall be allocated. MassCEC estimates that the Program Manager will be able to serve approximately one hundred (100) households with the available budget, depending on the proposed prices for the tasks described in Section VI.

A proposed timeline for the campaign is provided below in Section V (Estimated Timeline).

IV. ELIGIBILITY

Applicants may be individuals, sole proprietors, or companies/non-profits with multiple employees. **Applicants are encouraged to partner with other organizations in order to provide complementary expertise that a single entity may not possess.** For the sake of this RFP, the term Applicant may refer to either a single entity or several entities applying together. Individual entities may apply as part of multiple teams. Teams with multiple entities should have one (1) entity that takes responsibility for organizing the team and proposal (the “Lead Applicant”). MassCEC will contract with the Lead Applicant of the Applicant team.

Given the breadth of potential solutions, Applicants must have a strong understanding of and demonstrated experience with all of the areas of expertise listed below.

- **Heating, ventilation, and air conditioning (“HVAC”):** Applicants should be familiar enough with air source and ground source heat pump technology, as well as ventilation strategies, to make high level recommendations to Participants, answer questions, and help compare quotes and proposals.

¹ <https://www.mass.gov/doc/clean-energy-and-climate-plan-for-2025-and-2030/download> (pg. 47)

- **Residential energy efficiency assessments and diagnostic testing:** Applicants should have familiarity with the [Mass Save® Home Energy Assessment](#) and other energy efficiency assessments.
 - Applicants must include at least one (1) entity that is in good standing with the Mass Save® program and is eligible to perform Home Energy Assessments, which will be conducted as part of the weatherization and electrification co-delivery model in order to make Participants eligible for Mass Save® weatherization incentives and the HEAT Loan.
 - Applicants should have certification to conduct blower door tests and combustion safety testing.
 - Additionally, Applicants should be able to use infrared imaging to aid in assessing a building.
- **Weatherization measures:** Applicants should be familiar with all the weatherization measures that can be recommended by Mass Save®, as well as other retrofit weatherization measures beyond the current Mass Save® scope such as spray foam insulation, continuous exterior insulation, and Aerobarrier.
 - Specifically, Applicants must include at least one (1) entity that has the ability to conduct blower door assisted air sealing.
- **Additional technologies:** Strong Applicants will also have the ability to answer high level questions on the following technologies:
 - Domestic hot water solutions
 - Solar photovoltaic and batteries
 - Other electric appliances (e.g., heat pump dryers, induction stoves, and electric lawn equipment)
 - Electric vehicles and e-bikes
- **Knowledge about available incentives:** Applicants should be familiar with existing and upcoming Massachusetts state and federal incentives available to Participants and be able to support Participants in securing them.
- **Outreach:** Applicants should have a demonstrated history of outreach to moderate income households and landlords.
- **Contractor engagement:** Applicants should have a demonstrated history of successful collaborations with weatherization contractors, heat pumps installers, electricians, and other decarbonization vendors.
- **Program management and administration:** Applicants should have a track record of successful pilot implementation, including managing budgets and timelines, tracking metrics, and writing reports.

V. ESTIMATED TIMELINE

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

Release of RFP	April 29, 2024
Questions due to MassCEC via email to buildings@masscec.com	May 10, 2024
Questions with answers posted to MassCEC's website	May 15, 2024

Proposals due	May 24, 2024
Interviews of top applicants	June 2024
Notification of award	June 2024
Campaign outreach and implementation	Beginning July 2024 (for as long as funding remains available)

VI. SCOPE OF WORK

TASK 1: PROJECT MANAGEMENT AND PROGRAM ADMINISTRATION

Manage and implement the campaign, including collecting and sharing feedback on the implementation of the campaign. Select and confirm eligibility of Participants and distribute incentives to Participants.

- The Program Manager will be the eyes and ears of MassCEC in the field. MassCEC will depend on the Program Manager to collect and share feedback from Participants and contractors, as well as providing their own feedback. This feedback will be used to refine the campaign.
- Attend quarterly check-ins with MassCEC and representatives from the Communities.
- Draft and publish (online) Participant guidelines and any necessary Participant documentation and agreements in consultation with MassCEC, DOER, and the Communities.
- Confirm Participant’s eligibility based on their household income or the Project Site’s status as a rental property.
 - Moderate income Participants can have their income verified through [Mass Save®’s enhanced residential program](#) or other income verification protocols approved by Mass Save®.
 - Participants who are owners of rental properties can confirm their eligibility by sharing a current lease or equivalent documentation with the Program Manager.
 - The Program Manager should be prepared to connect low income households (household income less than 60% of state median income) and landlords with low income tenants to Mass Save’s [Income Eligible programs](#) in order to secure the maximum available support and incentive for these households and landlords.
- Create a Participant application and review process in consultation with MassCEC and select Participants.
 - The Program Manager will create an equitable process for Participant selection, including a mix of moderate income households and rental properties, as well as an approximately proportionate distribution between Northampton and Easthampton Participants.
 - The Program Manager will provide selected Participants with a designated contact for the duration of the campaign.

- Distribute incentive funding for heat pump installation to benefit Participants that move forward with installing heat pumps.
 - The Program Manager must create a process in consultation with MassCEC for distributing campaign incentive payments and tracking all state and federal incentives and rebates Participants receive. One option would be to pay the incentive funding to partner installers who could then offer Participants an equivalent discount on the cost of their heat pump installation.
 - The Program Manager should expect to award at least One Hundred Fifty Thousand Dollars (\$150,000) of the grant funding available to Participants that move forward with heat pumps. MassCEC anticipates that there will be approximately one hundred (100) Participants depending on the budget proposed by the accepted Applicant.
 - The Program Manager shall only make one (1) award per Participant.
 - The Program Manager will assist and encourage Participants to leverage other incentives and financing.
 - The MassCEC incentive will not exceed the total net costs of the Participant's heat pump installation.

The selected Program Manager will bill hourly for this task up to a maximum fee mutually agreed upon by MassCEC and the selected Program Manager.

TASK 2: OUTREACH

Conduct targeted outreach to recruit Participants in order to serve a diverse group of moderate income homeowners and landlords that is representative of the Communities.

- Conduct targeted outreach with a goal of recruiting approximately one hundred (100) Participants that include a mix of moderate income households and rental properties, as well as an approximately proportionate distribution between Northampton and Easthampton Participants.
- Participants should be selected who are planning to install heat pumps. MassCEC anticipates that some selected Participants may decide not to move forward with heat pumps and the full co-delivery model after the initial home energy assessment.
- As part of this scope, the Program Manager should be prepared to help potential Participants apply for the services offered in this campaign.
- MassCEC will review and approve all outreach materials prior to dissemination.

The selected Program Manager will bill hourly for this task up to a maximum fee to be mutually agreed upon by MassCEC and the selected Program Manager.

TASK 3: CO-DELIVERY

Provide co-delivery of weatherization, heat pumps, and other electrification measures to approximately one hundred (100) Participant Project Sites, including conducting an initial assessment for weatherization, heat pump, and electrical upgrade project opportunities and then planning and managing the implementation of recommended measures.

- Conduct an initial home energy assessment to evaluate Participant's Project Sites.
 - This home energy assessment should be a Mass Save Home Energy Assessment conducted by an entity that is in good standing with the Mass Save® program, in order to make Participants eligible for Mass Save® barrier remediation,

- weatherization incentives, heat pump incentives, and any other relevant electrification incentives, as well as the HEAT Loan.
- Additionally, the initial home energy assessment should include additional data collection necessary to allow the Program Manager to coordinate heat pump installation and related electrical upgrades or other electrification measures that the Participant wishes to pursue.
 - See Attachment D for the scope of a “Decarbonization Assessment” developed through MassCEC’s Decarbonization Pathways Pilot for reference.
 - For Participants that choose to move forward, plan and manage the implementation of the Participant’s weatherization, heat pump, and electrical upgrade projects, as well as any necessary barrier mitigation and other electrification projects that the Participant wishes to pursue.
 - The Program Manager will make sure that the scopes of these projects are complementary and appropriately sequenced.
 - Project scopes should be designed so as to not increase Participants’ total utility bills, unless the Participant species otherwise and appropriate tenant protections are in place.
 - If applicable, the Program Manager will coordinate with relevant Mass Save offerings, including Mass Save’s HEAT Loan and pre-weatherization barrier turnkey offering.
 - If applicable, the Program Manager will coordinate with loan products from the Massachusetts Community Climate Bank.
 - The Program Manager should be prepared to give detailed guidance on HVAC measures including:
 - Air source and ground source heat pump design and sizing (although ultimately the installation contractor will be responsible for the design and sizing of the system)
 - Heat pump equipment selection
 - Heat pump controls and operation
 - Heating and cooling distribution
 - The Program Manager should be prepared to provide a high level plan and support for the following measures:
 - Weatherization improvements beyond the measures supported by Mass Save® (e.g., spray foam insulation for hot roofs or basement, duct sealing)
 - Time of replacement envelope improvement (e.g., new weather barrier and/or exterior insulation with siding)
 - Window and door upgrades
 - Solar photovoltaics and battery storage
 - Electric vehicles and e-bikes
 - Hot water solutions, including heat pump hot water heaters and solar thermal
 - Ventilation design and sizing questions, including the need for mechanical ventilation if applicable
 - Other electric appliances: heat pump dryers, induction stoves, and electric lawn equipment.
 - The Program Manager may structure communication with Participants in whatever format they believe will allow them to be most responsive to

Participant inquiries (e.g., phone help line, online customer portal or chat). However, in the interest of accessibility, the Program Manager should be prepared to communicate with Participants at a level that is accessible to the general public and to work with Participants who may have limited internet access or comfort with technology.

- Assist Participants with finding and selecting contractors to implement their projects.
 - Applicants may propose developing a list of partner contractors if selected.
 - Alternatively, Applicants may include partner contractors for some or all of the proposed services as part of their team.
 - Applicants should prioritize working with partner contractors that can provide Mass Save rebates upfront.
 - Applicants shall ensure that partner contractors offer reasonable prices that are generally in line with current market prices.
 - Participants may choose to select a heat pump installer that is not vetted by the Program Manager. If they take this approach, they will forgo available co-delivery related to heat pump installation under the campaign.
- Assist Participants with leveraging available state and federal incentives, as well as financing options.

The selected Program Manager will bill hourly for this task up to a maximum fee per Participant to be mutually agreed upon by MassCEC and the selected Program Manager. Applicants may propose an alternative pricing structure for 2-4 unit buildings.

TASK 4: TARGETED AIR SEALING

Performing targeted air sealing using a blower door for Participants who are identified as good candidates for this service.

- Identify Participants as good candidates for targeted air sealing based on the initial home energy assessment.
- Use a blower door, as well as other tools such as theatrical smoke or an infrared camera to complete targeted air sealing.
- Record the unit's air leakage before and after the air sealing using a blower door.
- If applicable based on the level of air tightness achieved, discuss with Participants when mechanical ventilation is needed.

Applicants will be asked to provide a per Participant price per targeted air sealing. Applicants may propose an alternative pricing structure for 2-4 unit buildings.

Optional: If Applicant teams include a member who can perform duct sealing, Applicants may also propose performing duct cleaning and sealing for Participants who are identified as good candidates for that service (i.e., plan to reuse existing, leaky ductwork for a heat pump). Applicants are not required to be able to offer this service, and this will not be weighed as part of the core selection criteria.

TASK 5: QUARTERLY AND FINAL REPORTS

Summarize the results of the Tasks 1-4 and synthesize the lessons learned into quarterly and final reports.

- The Program Manager will provide quarterly summary updates to MassCEC for the duration of the campaign. The quarterly summary updates should include:

- Description of outreach strategies, including number of in person and virtual events, estimated number of attendees, description of marketing strategies employed, and estimated or tracked engagement metrics.
- The total amount of incentive funding distributed, as well as the types of awards (e.g., moderate income building owners vs. landlords, whole home vs. partial displacement, Northampton vs. Easthampton resident).
- List of measures installed, project cost data, and selected equipment for each Participant.
- Time spent on co-delivery, including number/duration of site visits and communications, length of engagement, topic, and summary notes.
- Number of targeted air sealing visits completed. Pre- and post-visit cubic feet per minute of air infiltration and ACH50 results for each visit.
- Since the Program Manager will be the primary point of contact with Participants, MassCEC will also request that the Program Manager develop and administer a brief follow up survey to Participants.
- Within three (3) months of the end of the campaign, the Program Manager will prepare a final report. The final report should include:
 - Final results of all metrics required for the quarterly reports.
 - Analysis of Participant survey results.
 - Qualitative analysis of lessons learned from the campaign, and reflections on opportunities and barriers to scaling some or all components of the campaign, including recommendations for modifications to the campaign components that would make them more scalable.

The selected Program Manager will bill hourly for this task up to a maximum fee to be mutually agreed upon by MassCEC and the selected Program Manager.

MISCELLANEOUS

MassCEC suggests that Applicants leave at least Five Thousand Dollars (\$5,000) for miscellaneous or unexpected tasks that may arise over the course of the campaign.

ADDITIONAL TASKS

As budget allows, Applicants may propose additional scopes for the campaign that they believe would enhance the campaign.

VII. HOW TO APPLY

Responses to this RFP must be received by MassCEC no later than Friday, May 24, 2024 at 5:00pm 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. Proposals should be in a single PDF document. “Electrify Northampton-Easthampton – Program Manager” 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
- Budget for each Task, including an hourly rate table for staff that will work on this scope of work
- Resumes of individuals that are be part of the Applicant team

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.

VIII. 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 VI (Scope of Work)?
 - Has the Applicant’s proposed approach demonstrated insight into additional needs of the MassCEC campaign?
- **Experience and Qualifications**
 - To what extent does the Applicant demonstrate the eligibility criteria outlined in Section IV (Eligibility)?
 - Has the Applicant successfully completed projects similar or relevant to the proposed work?
 - Does the Applicant have experience and qualifications to develop an approach to serve all households in the Communities, including Environmental Justice communities?
 - Does the Applicant team have a 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 has not completed certification with the SDO?
- **Cost Competitiveness**
 - How do the Applicant’s hourly rates compare to other Applicants?
 - How does the Applicant’s per unit rate for Tasks 1-4 compare to other Applicants?
 - How does the Applicant’s proposed maximum fee compare to MassCEC’s suggested cap and the fee proposed by other Applicants?
 - How does the scale and quality of the proposed scope compare to the proposed maximum fee?
- **Overall Quality of Proposal**
 - Does the Applicant demonstrate an understanding of the concepts and motivators underlying the campaign?
 - Has the Applicant demonstrated an ability to engage with and communicate effectively to Participants, especially a diverse array of building owners and landlords?
 - Has the Applicant demonstrated sufficient creativity and flexibility to support the campaign?
- **Applicant Team (if applicable):**
 - Does the partnership have a history of collaboration?
 - Does the partnership have a clear structure for collaboration?

IX. BUDGET

MassCEC anticipates awarding the Program Manager a total amount of Five Hundred Thousand Dollars (\$500,000) for this campaign. However, the Program Manager must reserve at least One Hundred Fifty Thousand Dollars (\$150,000) for direct incentives to approximately one hundred (100) Participants. MassCEC is open to Applicants suggesting an alternative number of Participants depending on the cost of other Tasks as long as all tasks and Participant incentives are within the total budget available. MassCEC suggests that Applicants leave at least Five Thousand Dollars (\$5,000) for miscellaneous or unexpected tasks that may arise over the course of the campaign. If an Applicant is unable to provide the services described in Section VI (Scope of Work) and reserve at least One Hundred Fifty Thousand Dollars (\$150,000) for incentives for approximately one hundred (100) Participants, the Applicant may propose an additional budget amount for MassCEC to consider awarding.

MassCEC anticipates that the Program Manager will be paid by the hour (not to exceed an agreed upon maximum) for Tasks 1, 2, and 5. For Task 3, the Program Manager will be paid by the hour not to exceed an agreed upon maximum for each Participant. For Task 4, MassCEC anticipates that the Program Manager will be paid on a per unit basis (i.e., per targeted air sealing completed) not to exceed an agreed upon maximum.

The proposed budget should reflect the proposed approach described in Attachment B: Application Form.

Additionally, Applicants may propose additional tasks beyond those described in Section VI (Scope of Work), but the scope and cost of those additional tasks should be clearly and separately outlined in Attachment B: Application Form.

X. CONTACT INFORMATION FOR QUESTIONS

buildings@masscec.com

XI. 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. 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.

DISCLAIMER AND 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.

CONTRACT REQUIREMENTS

Upon MassCEC's authorization to proceed with the proposal, MassCEC and the awarded Applicant will execute a contract, substantially in the form of the Sample Agreement attached hereto as Attachment C, which will set forth the respective roles and responsibilities of the parties.

ATTACHMENT A: AUTHORIZED APPLICANT'S SIGNATURE AND ACCEPTANCE FORM

Request for Proposals: Program Manager for Electrify Northampton-Easthampton (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 has read and understands 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 B: APPLICATION FORM

(See attached)

ATTACHMENT C: SAMPLE AGREEMENT

(See attached)

ATTACHMENT D: DECARBONIZATION ASSESSMENT FRAMEWORK

(See attached)