MASS
CLEAN ENERGY CENTER

Request for Proposals:

Equity in Grid Services Initiative:

Piloting Equitable Access to Dispatchable Distributed Energy Resources and Grid Services

Date of Issue: June 29, 2026
Proposals Due: July 31, 2026 at 11:59 PM

Total Funding Available: $600,000

All proposals must be submitted to:
grid@masscec.com

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1. SUMMARY

The Massachusetts Clean Energy Center ("MassCEC") seeks a qualified consultant or consultant team to lead an initiative focused on increasing equitable access to dispatchable distributed energy resources ("DERs") and participation in grid services. This work builds on MassCEC's Grid Services Study [1] and the current Massachusetts' electric distribution companies ("EDC") pilot phase enabled by the Grid Services Compensation Fund ("GSCF"). The work also supports the Commonwealth's energy access and affordability goals, including the Healey-Driscoll Administration's target of 3.5 GW of new load management strategies outlined in the March 2026 Executive Order.[2] The selected consultant will collaborate closely with MassCEC and a partner team which includes Massachusetts EDCs, state entities, and community-based organizations ("CBOs") (collectively, the "Project Partners") to:

- Design and implement two community-centered pilots that expand access to dispatchable DERs and ConnectedSolutions+ for renters and low- and moderate-income residents in historically underserved, burdened, or environmental justice communities, launching by Spring/Summer 2027 with a one-year operation.
- Translate learnings into actionable recommendations, best practices, and next steps to inform future programs, pilots, and policy in Massachusetts.
- Advance shared learnings about increasing equitable access to dispatchable DERs and grid services participation across the grid services ecosystem.

The anticipated total budget for this work is approximately $600,000, of which at least $150,000 should be reserved for acquiring and installing the selected dispatchable DERs.

2. ABOUT MASSCEC

The Massachusetts Clean Energy Technology Center 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

[1] https://www.masscec.com/resources/grid-services-study
[2] https://www.mass.gov/info-details/executive-order-to-secure-massachusetts-energy-future

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 GOALS AND DESCRIPTION

BACKGROUND

Massachusetts has made significant progress in managing peak electricity demand at the bulk system level, including via the ConnectedSolutions program.[3] ConnectedSolutions enables customer-sited DERs to reduce system peak demand in response to utility signals, demonstrating the important role that customer-side flexibility can play in supporting peak load management and advancing affordability.

Despite this progress, participation in system-level grid services remains uneven. Renters and low- and moderate-income residents who live in historically underserved, burdened, or environmental justice communities face barriers to accessing and benefiting from these offerings. Expanding opportunities for customer participation in grid services in Massachusetts will require continued scaling of programs while also addressing participation gaps to ensure benefits are distributed equitably.

At the same time, Massachusetts is entering an important phase in the development of *local* grid services. Local grid services address specific, location-based constraints on the distribution system (rather than the bulk system). The Grid Services Study, published in Fall 2025, established a valuation framework for how EDCs can compensate DERs to meet local system needs while ensuring net savings for customers. Because distribution system investments and upgrades are a significant driver of overall grid costs and therefore ratepayer bills, [4] DERs providing local grid services represent an emerging tool for improving affordability by deferring or avoiding costly infrastructure upgrades.

However, stakeholder input captured through the Grid Services Study identified several challenges that could limit equitable participation in both system-wide and local grid services. These challenges include limited access to DER ownership, challenges related to program design and communication, and the need to build stronger trust and engagement with communities.[5]

[3] ConnectedSolutions is a program that offers incentives to residents with battery storage or smart thermostats in exchange for the EDCs to manage and reduce energy use of enrolled assets during times of peak electricity demand on the grid. See National Grid: ConnectedSolutions | National Grid and Eversource's: Demand Response | Eversource websites for more information

[4] See section 3.1 in the Grid Services Study: DER-iving Local Value: Distribution Grid Services in the Commonwealth of Massachusetts

[5] See pages 22,42,51, and 58 in the Grid Services Study: DER-iving Local Value: Distribution Grid Services in the Commonwealth of Massachusetts

In addition, the emerging nature of DERs and grid services presents a general awareness and engagement challenge. For many residents and small businesses, these technologies and concepts are unfamiliar and may not clearly translate into relatable benefits. Without a clear understanding of how participation can provide value (e.g. energy cost savings, increased resilience, or improved comfort) and without information delivered through trusted community channels, equitable adoption is unlikely to occur at scale.

Beginning in the summer of 2025, Massachusetts EDCs, through the Grid Services Compensation Fund ("GSCF"), entered into the multi-year pilot phase of testing local grid services offerings in limited locations. Learnings from this period are expected to inform Electric Sector Modernization Plans ("ESMPs"), including the next major round of filings in 2029.[6]

As grid services expand in Massachusetts, a core question is not whether these offerings will scale over time, but who will be able to participate and who will benefit as these programs evolve.[7] Stakeholder input reflected in the Grid Services Study underscores that expanded use of DERs and grid services has the potential to contribute to a more affordable, equitable future grid, or to reinforce existing inequities if equity considerations are not integrated early.[8] Because future DER and grid services program structures are still being defined, the current pilot phase presents a critical opportunity to trial and design offerings that promote equitable access and ensure that renters and low- and moderate-income residents who live in historically underserved, burdened, or environmental justice communities can participate in, and benefit from, grid services in Massachusetts.

GOALS

Given the evolving future of DER and grid services program structures and the lack of awareness and access in many communities, there is a need to test approaches that build awareness, trust, and demonstrated value through real-world implementation. The EDCs have included equity considerations in their GSCF pilots, as well as National Grid's related Income-Eligible Battery Virtual Power Plant (VPP) Offering. In addition, MassCEC and its Project Partners are launching the Equity in Grid Services work outlined in this RFP to add smaller, community-centered pilots during this learning period to help establish proof of concept, refine engagement approaches, and build momentum for broader participation over time.

This initiative is designed to respond to the background context included above through a collaborative, learn-by-doing approach, informed by the philosophy of MassCEC's Grid

[6] Links to each EDCs ESMP filings can be found on this page: Background and procedural requirements on electric sector modernization plans | Mass.gov. See page 42 in the Grid Services Study: DER-iving Local Value: Distribution Grid Services in the Commonwealth of Massachusetts

[7] CESA VPP and EJ Webinar, April 2026

[8] See pages 25, 26, and 42 in the Grid Services Study: DER-iving Local Value: Distribution Grid Services in the Commonwealth of Massachusetts

Collaboration Lab.[9] This philosophy also informed the successful partnership model of the Grid Services Study. Because local grid services are new for all stakeholders, this work emphasizes early shared learning and capacity-building across the EDCs and the full ecosystem.[10] The work also focuses on testing approaches that build shared understanding, trust, and access. By convening the full ecosystem of Project Partners during the GSCF pilot phase, the initiative is designed to generate insights that clarify the overlapping and connected roles of ecosystem actors. The insights from this collaborative approach can strengthen equitable access to DERs and grid services, inform future ESMPs, and advance the Commonwealth's net-zero and affordability goals, including the Healey-Driscoll Administration's target of 3.5 GW of new load management strategies outlined in the March 2026 Executive Order.

The primary goals of this initiative are to:

- Test and refine approaches for improving access to DERs and participation in grid services through collaborative pilots that co-design engagement and implementation in ways that build understanding, trust, and accessibility for renters and low- and moderate-income residents who live in historically underserved, burdened, or environmental justice communities.
- Increase ecosystem-wide readiness for equitable grid services at scale by:
    - Generating actionable learnings and recommendations that support the future expansion of access to dispatchable DERs and participation in both system-wide and local grid services for renters and low- and moderate-income residents who live in historically underserved, burdened, or environmental justice communities;
    - Defining best practices, roles, and future needs across EDCs, state agencies, community-based organizations, technology providers, communities, and other relevant stakeholders;
    - Deploying dispatchable DER technology, (e.g., permissionless batteries, smart hot water heaters, home battery storage, smart plugs for window air conditioners, and smart thermostats) that is particularly suited for renters and low- and moderate-income residents who live in historically underserved, burdened, or environmental justice communities; and
    - Translating pilots' approach and findings into practical guidance that can inform future grid services programs, ESMPs integrated energy planning, and related policies, helping ensure that grid services deliver system value, customer benefits, and equitable outcomes as they scale over time.

[9] MassCEC's Grid Collaboration Lab uses convenings and funding to bring together diverse voices to develop technical foundations and explore new approaches to grid policy, regulation, and technology adoption and integration. By connecting EDCs, government agencies, industry, community advocates, and academics early in the process, we help build the next set of solutions for the Massachusetts energy system

[10] We are using the term "ecosystem" to represent EDCs, state agencies, community-based organizations, technology providers, communities, and any other relevant stakeholder group

- Advance shared learnings across the grid services ecosystem during the time-critical GSCF pilot period, recognizing that early design and implementation choices will shape who is able to participate in, and benefit from, grid services as programs scale.

4. ELIGIBILITY

An applicant or applicant team (each an "Applicant") may consist of one (1) or more individuals, sole proprietors, professional consultants, institutions, or companies with multiple employees. MassCEC encourages potential applicants to form a team ("Applicant Team"), if necessary, to provide all the requisite experience required for the scope of work described in Section 6, especially recognizing that the scope includes diverse tasks from community engagement to data tracking. Proposals must be submitted by a single lead Applicant and clearly identify relevant Applicant team sub-vendor(s) with whom to jointly respond to this RFP and the respective roles and experience.

5. ESTIMATED TIMELINE

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

Release of RFP	Monday, June 29, 2026
Questions due to MassCEC via email to grid@masscec.com	Updated: Wednesday, July 15, 2026, by 11:59 PM
Questions with Answers Posted to MassCEC Website	Friday, July 17, 2026
Proposals Due	Friday, July 31, 2026, by 11:59 PM
Interviews of Top Applicants (if needed)	Week of August 31, 2026
Notification of Award, Contracting Begins	September 2026
Scope of Work Begins	October 2026
Dispatchable DERs Deployed and Live	April 2027 (initial target, may shift based on confirmed work plan)
Final Report Available	June 2028 (initial target, may shift based on confirmed work plan)

6. SCOPE OF WORK

The Applicant should review and respond to all four (4) tasks of work described below. If

necessary, the Applicant may add to or propose adjustments to the scopes. The value added by additional or adjusted scopes of work by the Applicant should be clearly articulated in the associated Workplan Narrative as described in Section 7 (How to Apply).

TASK 1: PROJECT MANAGEMENT & ECOSYSTEM COLLABORATION

This task supports ongoing collaboration among Project Partners representing the grid services ecosystem. Collaboration will focus both on advancing the immediate project scope and on building shared understanding of ecosystem needs, emerging challenges, and best practices drawn from this work and related efforts outside this initiative. Throughout the project, there will be regular coordination meetings (at least bi-weekly, sometimes weekly) to facilitate information sharing and alignment across partners. These meetings should include regular time for Project Partners to provide updates on work in their GSCF and other related pilots (e.g., National Grid's low-income battery virtual power plant offering) that increase access to dispatchable DERs and participation in grid services.

The Consultant will be responsible for preparing agendas, facilitating these meetings, taking notes, identifying follow-up actions, and ensuring that key insights and learnings are documented and incorporated into project deliverables, including the final report.

Task 1 Deliverables

- Schedule and pre-prepare agendas for at least bi-weekly meetings with MassCEC and the Project Partners.
- Prepare meeting notes from each project team meeting with identified follow-up actions.
- Document ecosystem needs, emerging challenges, and best practices for increasing equitable DER access and participation in grid services as they emerge throughout this work and the EDC's own GSCF and related pilots to include in other project deliverables below.
- Provide monthly updates to MassCEC on budget spend.

TASK 2: PLAN, MANAGE, & TRACK DER AND GRID SERVICES ACCESS PILOTS

This task focuses on the planning, management, and tracking of two community-centered, pilots that test approaches to expanding equitable access to dispatchable DERs and participation in grid services. (Note: The actual purchasing and installation of the selected dispatchable DERs are separated into Task 3 below for budget tracking purposes.)

One pilot will be in Eversource service territory and one in National Grid service territory and may be identified prior to the Consultant's selection.[11] Each pilot will deploy a dispatchable DER

[11] Pilot candidate sites will be identified within areas where Eversource and National Grid have indicated distribution system constraints. From this initial set of potential locations, the partner team will work with relevant community-focused stakeholders to engage communities and identify pilot communities where there is interest

solution (such as permissionless batteries, smart hot water heaters, home battery storage, smart plugs for window air conditioners, and smart thermostats) to evaluate both technology deployment and program design strategies that enable participation by priority populations (i.e., renters and low- and moderate-income residents who live in historically underserved, burdened, or environmental justice communities).

The pilots are intended to test not only the performance of DERs and related learnings for the target population, but also the engagement, program design, and partnership approaches required to ensure equitable participation. In addition to completing two pilots, this task is expected to generate practical, reusable tools and implementation insights that enable EDCs, program administrators, and community partners to more effectively work alongside communities to deliver equitable access to DERs and grid services.

The Consultant will be responsible for leading the design and implementation of the pilots in close coordination with MassCEC and the Project Partners. Activities should include, but are not limited to:

- **Finalize pilot work plan:** Building on existing research and incorporating feedback from communities and Project Partners, finalize a work plan with confirmed technology selection, participation selection approach, data collection plan, and a pilot implementation timeline.
    - As background, synthesize existing research and program context:
        - Review and synthesize relevant reports and prior work to inform pilot design, including:
            - MassCEC Grid Services Study;
            - Clean Energy Group's *Electrification with Equity* (Parts 1 and 2);[12]
            - CESA Virtual Power Plants and Energy Justice webinar;[13] and
            - Additional resources identified by MassCEC, Project Partners, and the Consultant.
        - Connect with the Community First Partnership program to explore lessons learned and best practices from their location-based community initiatives.
        - Translate findings into practical design considerations for the pilots (e.g., barriers, enabling conditions, promising engagement and financing models).
    - Prioritize community-centered co-design and engagement in finalizing technology and participant selections.

and readiness to participate. The number of participants within each pilot community will depend on the chosen technology and input from participating communities

[12] Part 1: Electrification with Equity, Part 1: The Opportunity for Behind-the-Meter Solar and Storage in Massachusetts - Clean Energy Group, Part 2: Electrification with Equity, Part 2: Scaling Behind-The-Meter Solar+Storage in Massachusetts Environmental Justice Neighborhoods - Clean Energy Group

[13] Virtual Power Plants and Energy Justice - Clean Energy States Alliance

        - Conduct early and ongoing engagement with selected community-based organization partners, other CBOs, community leaders, and other trusted intermediaries.
        - Co-develop pilot design elements, including participant recruitment strategies, program structure, and customer experience.
        - Ensure engagement approaches are culturally competent, accessible, and responsive to community-identified needs and priorities.
        - As described in Section 9 (Budget), MassCEC plans to provide a selected CBO in each of the two (2) pilot areas up to $25,000 to compensate for their participation in the collaborative design of the pilot and community outreach and engagement. This potential funding of up to $50,000 comes from funding not included in this $600,00 budget. However, MassCEC recommends that Applicants reserve additional money from this $600,000 budget to compensate individual residents to participate in surveys, focus groups, etc. or to serve as community ambassadors and recruit other members of their community (e.g., by offering tours of the selected dispatchable DER installed in their home).
    - Confirm technology selection for dispatchable DERs.
        - Note: The EDCs and MassCEC are currently working on technology selection that is a fit for renters and low- and moderate-income residents who live in historically underserved, burdened, or environmental justice communities. For example, MassCEC hopes to explore whether permissionless batteries, smart hot water heaters, home battery storage, smart plugs for window air conditioners, and/or smart thermostats could be used in these pilots.
        - Selected technology must be able to participate in ConnectedSolutions+. EDC Project Partners will work with the Consultant to explore what technologies can be included in ConnectedSolutions+.
    - Establish and document a set of performance metrics. Suggested minimum metrics could include: participant compensation; number of dispatch events per DER; kilowatts (kW) delivered per event; frequency of participant opt-outs; and DER downtime. Include additional metrics that support utility decision-making regarding whether and how to scale or support these technologies and any metrics helpful to communities.
    - Coordination with all Program Partners, including EDCs, and dispatchable DER technology partners.
        - Work with Eversource, National Grid, and technology providers to align the pilot design with solutions that provide relief to location-based constraints on the distribution system. In addition, the solutions should meet the utilities' operational requirements and technology capabilities needed to provide EDCs with coordination and control of customer-owned DERs via edge DERMS. The Consultant will be responsible for executing agreements with participants to support any data sharing needs identified during program design (as needed, e.g. when

participants get signals from utilities, how they react to those signals, and what compensation they receive).
        - Support integration of selected DERs into ConnectedSolutions+ pilot program through supported edge-DERMS platforms (e.g. Energy Hub).
    - As described in the Section 5 (Estimated Timeline), the target timeline for installed dispatchable DERs is Spring 2027. The technology and participation in ConnectedSolutions+ will operate for a year, but MassCEC recognizes that this timeline may shift do to events outside of the Consultant's control and/or new priorities identified by MassCEC and the Project Partners.
- **Participant education, recruitment, and enablement**: In partnership with selected CBOs:
    - Develop clear, accessible educational materials to support participant understanding of:
        - The DER technology and how it interacts with the participant and electric grid;
        - Grid services participation and compensation;
        - Pilot limitations; and
        - Benefits, risks, and expectations.
    - Recruit participants.
    - Support participant onboarding and ongoing engagement throughout the pilot period.
    - Document community questions and needs.
- **Manage installation of selected DERs:** This task covers the Consultant's time spent preparing for and implementing the purchase and installation of the DERs.
    - Manage the purchase and installation of the selected dispatchable DERs, including, if possible, pursing bulk discounts.
    - Installation support and coordination with technology providers, including executing appropriate agreements with a technology provider.
    - In partnership with the selected CBO, handle participant communications.
    - Answer questions from participants about terms and conditions, safety considerations, etc.
    - Coordinate and support enrollment in ConnectedSolutions+, coordinating with EDC marketing teams to ensure consistent messaging.
    - Ongoing troubleshooting and issue resolution.
    - Note: The direct cost of buying and installing the DERs is captured under Task 3.
- **Data tracking**
    - Once the dispatchable DERs are installed, work with participants, technology providers, and EDC Project Partners to obtain the necessary permissions and track the set of metrics agreed upon (Task 1).
    - In partnership with the selected CBO, MassCEC, and other Project Partners, prepare a survey or interview of the participants to capture their experience of participating.

Task 2 Deliverables

- Finalize work plan with MassCEC and Project Partners, including the selection of dispatches DERs for the pilots and the agreed upon metrics.
- Develop educational outreach materials.
- Recruit participants.
- Execute agreements with selected DER technology providers and installers (if applicable).
- Manage the installation of the DERs (does not include the direct costs to buy and install the DERs).
- Secure the necessary participant permission to track pilot data and participant feedback.

TASK 3: PROCURE & INSTALL DISPATCHABLE DISTRIBUTED ENERGY RESOURCES

This task covers the procurement and installation of the selected dispatchable distributed energy resources. It is separated from Task 2 primarily for budget tracking purposes. MassCEC expects to be billed for the costs of procuring the dispatchable DERs and any associated installation costs. The specific type of dispatchable DER will be confirmed as part of the finalization of the work plan (Task 2). At this time, MassCEC and the Project Partners are exploring the potential of multiple technologies including permissionless batteries, smart hot water heaters, home battery storage, smart plugs for window air conditioners, and/or smart thermostats for one or both pilot sites. It is anticipated that National Grid and Eversource will each select one technology.

MassCEC expects that the Consultant will use the funding under this Task to cover the full cost of purchasing and installing the selected dispatchable DERs, although, with input from community partners, MassCEC is open to approaches where participants contribute some of the cost and/or technology providers provide bulk discounts. Additionally, MassCEC is targeting a model where participants will own the dispatchable DERs, but, with input from Project Partners, is open to other models.

Task 3 Deliverables

- Dispatchable DERs are successfully deployed in selected participants' homes and buildings and enrolled in ConnectedSolutions+.

TASK 4: INTERIM & FINAL REPORTS

This task focuses on summarizing the findings from Tasks 1 and 2 into a final, public-facing report and presentation that captures key learnings, outcomes, and actionable recommendations for scaling equitable access to DERs and participation in grid services across Massachusetts.

The Consultant will be responsible for leading the development of these deliverables in close coordination with MassCEC and the broader Project Partners. This will include incorporating feedback from MassCEC and Project Partners, as well as ensuring that findings reflect both technical and community-centered perspectives.

Because the ecosystem is actively learning about how to design grid service offerings and because each season has unique considerations for grid services offerings, the Consultant will produce brief (2-3 page) interim project updates after each season that the pilot dispatchable DERs are deployed.

The final report should include documentation of pilot results and provide guidance for future program design, policy development, and implementation. The final report should include recommendations for approaches to scale access to DERs, including proposed incentive design. Recommendations should be tailored to key ecosystem actors—including EDCs, state agencies, community-based organizations, program administrators, and technology providers—and should recognize the interconnected and parallel roles required to scale equitable grid services. Additionally, as relevant, include considerations for how to scale these approaches in the potential context of time varying rates.

As part of this task, the Consultant will also design and facilitate a stakeholder session to share pilot findings and gather input to validate and refine recommendations, particularly as they relate to working effectively with communities to support equitable access and participation.

Task 4 Deliverables

- Per pilot: 4 brief (2-3 pages) interim project update roughly after each season that the pilot dispatchable DERs are deployed. We expect the timeline of the two pilots to be largely overlapping, but the timelines could diverge by several months.
- Draft final report, for review by MassCEC and Project Partners.
- One to two stakeholder sessions to preview and validate recommendations.
- Final report.
- Public webinar to present the project, findings, and report.
- Presentations to the EEAC and GMAC to help inform future demand response and ESMPs.

7. HOW TO APPLY

To respond to this Request for Proposals, submit a completed Proposal, not including recommendation letters. The submission must be in electronic form (one PDF file), including all relevant attachments, submitted via email to grid@masscec.com. "Equity in Grid Services" must appear in the e-mail subject line. Submission packages must include the following:

1. Applicant's Signature and Acceptance Form (Attachment 1)
2. Proposal (see outline of Proposal Requirements below)
3. Team Members Resumes (as an appendix)
4. Up to three (3) Work Samples (as optional appendices)

PROPOSAL REQUIREMENTS

Proposals must contain the following sections. For ease of review and comparison, please number Application sections in accordance with the sections outlined below. Do not exceed the specified page limits.

1) **Executive Summary (one (1) page)**: Applicants should provide a summary of their organization, qualifications, and their proposed approach for working with MassCEC and with the range of stakeholders participating in the applicable Scopes of Work, including subcontractors.
2) **Statement of Qualifications (up to three (3) pages)**: All responses must include a statement of qualifications, experience, and description of the Applicant, including:
    a) A brief description of organization(s) involved in the proposing team, including major subcontractors. Include date founded, history, size, and location. Note that for all vendors and sub-vendors, demonstrated experience working within the MA clean energy and/or environmental justice ecosystems will score higher in proposal evaluation.
    b) Include an explanation of why the proposed organization or team is the best qualified to perform the work outlined under the Scope of Work (Section 6). Identify other organizational qualifications relevant to the proposed work. Include examples of relevant past work.
    c) Describe the team's ability to work with key stakeholders, such as, but not limited to, MassCEC, EDCs, state agencies, CBOs, non-profits and advocacy organizations, and renters and low- and moderate-income residents in historically underserved, burdened, or environmental justice communities.
    d) Describe applicant experience and familiarity with demand response and coordination with technology providers.
    e) Identify key individuals who will be involved in the Scope(s) of Work and related Tasks. Provide one (1) to two (2) paragraph summaries of relevant facilitation, and engagement expertise of these individuals as well as experience working with renters and low- and moderate-income residents who live in historically underserved, burdened, or environmental justice communities. Submit resumes (as appendices) of all key Applicant Team members. Resumes should include education and experience that are relevant to the proposed work.
    f) Identify how the team is qualified to meet the RFP's equity-based goals, including organization mission or vision statements as appropriate.
    g) If applicable, identify bilingual Applicant team members that can communicate with non-English speakers in a culturally sensitive manner and the language(s) represented.
    h) If applicable, list MassCEC and other state or federal contracts awarded to the Applicant and/or any subcontractors in the past five (5) years.
3) **Renters/LMI Resident Engagement Approaches (up to one (1) page)**: Please include a brief summary of you or your organization's approach to and experience working with

renters and low- and moderate-income residents who live in historically underserved, burdened, or environmental justice communities. If available, please provide or link to any relevant materials (e.g., organization guidance documents). You may also include brief examples of initiatives, projects, or other work in which the Applicant or Applicant Team have demonstrated a clear understanding of the needs and barriers in Massachusetts of renters and low- and moderate-income residents who live in historically underserved, burdened, or environmental justice communities and how those needs and barriers were addressed. The summary should also describe any working with residents or community-based organizations in project co-design and co-implementation, if applicable.

4) **Work Plan Approach Narrative (up to five (5) pages)**: The Work Plan Approach Narratives describes the Applicant's initial proposal for work activities, deliverables and timeline associated with completing the Scope of Work provided in Section 6, based on the information available in this RFP. MassCEC expects that the Work Plan will be finalized as part of the project scope (Task 2). The Narrative shall describe each proposed step or procedure required to accomplish each Task, including who will perform it, how it will be performed and its intended result. The Narrative should identify the team member primarily responsible for each task. The Narrative may include additional scopes beyond the Tasks listed in Section 6. If additional scopes are included, the Applicant should provide justification for any additional scopes.
5) **Schedule (one (1) page)**: All responses must include an estimated schedule, including all proposed milestones and deliverables and their length or date of completion. The schedule should incorporate the information provided in Section 5 (Estimated Timeline).
6) **Budget and Rate Sheet (up to two (2) pages)**: Budgets should be broken out by each Task described in Section 6 (Scope of Work), including a separate line item for any additional task/s proposed by the Applicant.
    a) In addition to the time of project team members, the budget may include direct costs such as the cost to buy and install the selected dispatchable DER, printed outreach materials, gift cards for survey responses, stipends to community ambassadors, etc. Direct costs and hourly time should be combined to form the budget for each Task described in Section 6 (Scope of Work).
    b) To justify Task budgets, Applicants should provide a budget narrative and clearly identify the metric and assumptions used to determine cost.
    c) Applicants should provide a table with the hourly billing rates of all project team members.
7) **References**: All responses must include references from at least two (2) clients of the Applicant, and preferably clients who have worked with the Applicant on matters related to the proposed services. If possible, Applicants should also list one to two (1-2) MA-based CBOs that they have worked with in the past as references. These references must include a contact person, a full address, an email address, and a phone number. Current and former MassCEC staff may be included as supplementary references for previous work conducted on behalf of MassCEC, but do not count toward the specified reference requirements.

8) **AI Statement (up to one (1) page):** Please disclose to MassCEC in your application any use of, or planned use of, generative AI either in responding to this RFP or in carrying out the scope of work required for the project or services, if awarded. MassCEC reserves the right to review submitted materials to determine whether generative AI was likely used, including using detection tools, linguistic analysis, or verification methods as appropriate. MassCEC further reserves the right to accept or reject any proposed uses of generative AI, or request supplemental non-AI generative materials from applicants, or cancel or rescind an award where generative AI has been used without MassCEC approval.
9) **Resumes**: Please attach resumes for all members of the Applicant Team.
10) **Work sample (optional)**: If desired, attach up to three (3) relevant work samples.
11) **Review Services Agreement:** Applicants are expected to review the template Services Agreement (Attachment 2) and flag any changes to the Agreement that they would like to request prior to signing the contract. If Applicant has proposed edits to the Agreement, please include the redlined Agreement as a separate attachment. (**Note**: MassCEC has limited ability to change our standard legal contract terms. Please note that reviewing and requesting changes to standard legal contract terms, if selected, will impact timelines for contracting.)

No additional materials should be submitted. Any additional materials will not be considered in the evaluation. Under no circumstances will MassCEC accept responses past the deadline. MassCEC, at its sole discretion, will determine whether an application is complete.

8. SELECTION CRITERIA

MassCEC is seeking the most comprehensive Proposal from qualified entities to fulfill the roles described above. All Proposals must be responsive to the relevant scope of services and proposal requirements outlined in this RFP.

Applicant Proposals will be evaluated on the following criteria:

Criterion	Definition
Qualifications **25%**	Relevant experience and past performance • The quality and relevance of the Applicant's experience on similar projects, including pilot design and implementation, co-design with communities, community engagement approach, DER deployment, grid services, and stakeholder engagement. • Demonstrated success delivering outcomes on prior project. • Strength of references and prior performance under MassCEC, state, or federal contracts (if applicable).

	Community-centered engagement and equity experience
	• Demonstrated experience working with municipalities, community-based organizations (CBOs), renters, low- and moderate-income residents, and environmental justice communities.
	• Clear understanding of, and experience applying, co-design, community-centered engagement, and the use of trusted intermediaries.
	• Demonstrated commitment to and integration of diversity, equity, inclusion, and environmental justice principles in prior work.
	
	Creation and delivery of accessible, community-relevant materials
	• Experience developing accessible, culturally competent educational materials and engagement approaches that support participant understanding and engagement.
	
	Technical and programmatic expertise
	• Relevant experience and expertise of proposed team members in:
	  ○ Dispatchable DERs;
	  ○ Grid services (system-wide and local), especially in Massachusetts;
	  ○ EDC programs, operations, and partnerships; and
	  ○ Pilot or demonstration project design and implementation.
	
	Partnership, facilitation, and coordination capabilities
	• Demonstrated ability to facilitate and coordinate across diverse stakeholders, including EDCs, state agencies, CBOs, technology providers, and community members.
	• Strength of communication and interpersonal skills, including the ability to clearly convey project goals, expectations, and technical concepts to varied audiences, including in virtual stakeholder sessions.

Project Workplan and Services to be Provided **25%**	Aligned with scope • The extent to which the proposed workplan demonstrates a clear understanding of the objectives and requirements outlined in Section 6. Clarity and feasibility of approach

	• The clarity of the proposed approach, including how each task will be carried out and by whom. • The overall feasibility of the proposed approach given the project scope and timeline. • Demonstrated understanding of key milestones, including pilot design, community engagement, technology deployment, and implementation timelines. Value of proposed modifications (if applicable) • Any proposed changes or additions to the Scope are clearly justified, add value, and align with the initiative's goals.
Overall Quality of Proposal **25%**	Clarity and completeness • The extent to which the proposal is clear, well-organized, and complete. • Adherence to the Proposal requirements and format. • Overall quality of communication, including the Applicant's ability to clearly present qualifications, approach, and understanding of the work. Capacity • Demonstrated availability of sufficient staff time, resources, and organizational capacity to carry out the Scope of Work. • Flexibility and adaptability to respond to evolving project needs.
Cost-Competitiveness **25%**	Scope Aligned with Budget • The extent to which the proposed services and level of effort are appropriate and commensurate with the proposed budget. • Applicant has set aside a reasonable budget for Task 3. Hourly rates • Comparison of the hourly rates to other Applicants, especially hourly rates for core staff on the proposed Applicant Team that would spend significant time on the initiative. Total proposed fee • Comparison of the scale and quality of the proposed scope compared to the proposed maximum fee.

9. BUDGET

The total budget for this initiative is expected to be approximately $600,000, allocated across all phases of work. MassCEC recommends reserving at least $150,000 for purchasing and installing dispatchable DERs (i.e., Task 3 as described in Section 6). While MassCEC recommends that Applicants reserve at least $150,000 for technology acquisition and installation, Applicants should propose a budget allocation that best supports the initiative's goals. MassCEC will consider proposals that allocate additional funding to technology where appropriate, particularly where Applicants demonstrate a strong and well-resourced approach to community co-design and engagement.

Separately from this $600,000 budget, MassCEC plans to contract with two (2) community-based organization, representing one (1) CBO for each of the two (2) pilot areas. MassCEC plans to provide each CBO up to $25,000 to compensate for their participation in the collaborative design of the pilot and community outreach and engagement. MassCEC recommends that Applicants reserve additional money from this $600,000 budget to compensate individual residents to participate in surveys, focus groups, etc. or to serve as community ambassadors and recruit other members of their community (e.g., by offering tours of the selected dispatchable DER installed in their home).

MassCEC anticipates that the selected Application will be paid by the hour or for reimbursement of expenses (e.g., dispatchable DERs) to be billed monthly with a cap not to exceed an agreed upon maximum per Task. As the initiative progresses, at the request of the selected Applicant, MassCEC reserves the right to shift funding amounts between Tasks.

MassCEC reserves the right to request modifications to proposed scopes and budgets, to make awards for only part of a proposal, and to make no award at all.

10. CONTACT INFORMATION FOR QUESTIONS

Please submit all questions in writing to grid@masscec.com no later than July 15, 2026 at 11:59 PM. *"Equity in Grid Services"* must appear in the subject line. Responses to questions will be posted on the RFP page no later than July 17, 2026.

11. 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 ("Public Records Law"). Applicant acknowledges and agrees that any documentary material, data, or other information submitted to MassCEC is presumed to be public records. An exemption to the Public Records Law may apply to certain records, including materials that fall under certain categories under a statutory or common law

exemption, including the limited exemption at Massachusetts General Laws Chapter 23J, Section 2(k) regarding certain types of confidential information submitted to MassCEC by an applicant for any form of assistance. Applicant acknowledges and agrees that MassCEC, in its sole discretion, shall determine whether any particular document, material, data or other information is exempt from or subject to public disclosure. Thus, MassCEC urges applicant to carefully consider what documents, materials, data and other information is submitted to MassCEC in connection with 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. **Please note:** consultant rate sheets will be considered a public record subject to disclosure.

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.

CONTRACT REQUIREMENTS

Upon MassCEC's authorization to proceed with the proposal, MassCEC and the awarded applicant(s) will execute a contract, substantially in the form of the template agreement attached hereto as Attachment 1 which will set forth the respective roles and responsibilities of the parties.