



Request for Proposals: Renter and Property Owner Content for Clean Energy Lives Here

Date of Issue: September 11, 2024
Proposals Due: October 10, 2024

Total Funding Available: \$200,000

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

1. Summary

Through this Request for Proposals (“RFP”), the Massachusetts Clean Energy Technology Center (“MassCEC”) seeks applications from entities (“Applicants”) to conduct market research and create web-ready content that helps Massachusetts 1) renters and 2) property owners decarbonize buildings with one to four (1-4) residential units. The goal of this work is to increase adoption of energy efficiency, electrification, and renewables by 1) renters and 2) property owners in Massachusetts. The selected Applicant will:

- Conduct research on the key trends, priorities, motivations, and challenges of Massachusetts 1) renters and 2) property owners in pursuing electrification, energy efficiency, and renewable energy projects. Such research will give particular attention to the needs of environmental justice populations.¹
- Develop targeted 1) renter and 2) property owner content for the Clean Energy Lives Here (“CELH”) campaign, particularly the CELH website (the “Website”). The selected Applicant will coordinate with MassCEC’s CELH marketing agency to integrate new content into the Website.

2. About MassCEC

MassCEC is a quasi-state economic development agency dedicated to accelerating the growth of the clean energy sector across the Commonwealth of Massachusetts (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.

¹ As defined by the Massachusetts Department of Energy and Environmental Affairs (EEA): <https://www.mass.gov/info-details/environmental-justice-populations-in-massachusetts>. EEA has mapped environmental justice populations in Massachusetts: <https://mass-eoea.maps.arcgis.com/apps/webappviewer/index.html?id=1d6f63e7762a48e5930de84ed4849212>.

3. Program Context And Goals

Program Context

In 2020, MassCEC launched a public awareness campaign called Clean Energy Lives Here (“CELH”), which educates Massachusetts residents about home decarbonization and provides resources to encourage residents to transition to clean energy technologies. The CELH Website features information on weatherization, heating and cooling, hot water, solar electricity, home appliances, and transportation (“Clean Energy Solutions”). On the Website, residents can learn about clean energy technologies, incentives and financing options, clean energy installers, and more. To make residents aware of the information on the Website, MassCEC has used advertising channels such as out of home banners/billboards, social media, search engine marketing (SEM), radio, local television, and streaming television. The solutions featured on the CELH Website are primarily (although not exclusively) applicable to small residential buildings (i.e., one-to-four-unit buildings). Parts of the Website have been [transcreated into Spanish](#), and in the coming year more of the Website will be transcreated into Spanish, Portuguese, and Khmer.

To date MassCEC’s existing CELH campaign has primarily targeted the Massachusetts single-family homeowner audience. 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 by 2050 relative to 1990 levels.² In addition to owner-occupied homes, renter-occupied buildings must also reduce reliance on fossil fuels to meet these buildings sector goals. Massachusetts property owners and renters must be centered in the Commonwealth’s energy transition, especially environmental justice populations.

Program Goals

The goals for the selected Applicant include:

- Increase adoption of Clean Energy Solutions by renters and property owners in Massachusetts.
- Conduct market research to understand the motivations, priorities, challenges, and leverage points for Massachusetts 1) renters and 2) property owners in pursuing Clean Energy Solutions.
- Identify state and federal incentives for 1) renters and 2) property owners and apply them to common renter and small property owner scenarios.
- Identify the customer journey for common 1) renter and 2) property owner personas.
- Provide comprehensive information on Clean Energy Solutions for 1) renters and 2) property owners of 1–4-unit residential buildings in Massachusetts.

²[Massachusetts Clean Energy and Climate Plan for 2050](#), Page 55.

- Provide practical and innovative suggestions on overcoming the barriers to decarbonization faced by 1) renters and 2) property owners.
- Develop CELH content for 1) renters and 2) property owners to incorporate into MassCEC’s Clean Energy Lives Here campaign.

4. Eligibility

Applicants may consist of one (1) or more individuals, sole proprietors, professional consultants, non-profits, advocacy agencies, institutions or companies with multiple employees. Proposals may be submitted by an Applicant Team, if necessary, to provide all the requisite expertise required. Proposals must be submitted by a single lead Applicant.

MassCEC strives to partner with organizations, companies, and entities that consciously work to create a diverse, equal and inclusive work environment. MassCEC encourages such partners to have a Diversity, Equity & Inclusion (“DEI”) policy to encourage hiring of a diverse team, provide equal and fair treatment of all team members, and ensure a workplace environment where all team members feel valued and can fully participate in driving organizational success.

Applicants must have the areas of expertise listed below:

- **Engagement with 1) renters and 2) property owners, especially from or serving environmental justice populations:** Applicants should have experience with successful outreach to and meaningful engagement with renters and property owners (1-4 units), especially from or serving environmental justice populations. Applicants should also have experience engaging with community-based organizations that support such groups.
- **Project Management:** Applicants should have demonstrated a history of successfully working with external stakeholders, managing budgets and timelines, tracking program metrics, and providing project updates.
- **Research Skills:** Applicants should possess strong research skills and have experience engaging with relevant stakeholders (e.g., real estate agents), renters, property owners, community-based organizations), especially Massachusetts stakeholders, to identify trends, priorities, challenges, and leverage points related to residential building decarbonization.
- **Content Creation and Customer Outreach:** Applicants should have experience translating technical information on Clean Energy Solutions into accessible, web-ready content and collaborating with web developers to refine and publish content. Applicants should have experience engaging and effectively communicating with customers to motivate customer action through storytelling, advertising, graphics, and other means. Such experience with renters and property owners, especially from or serving environmental justice populations is preferred.

- **Technical Expertise:** Applicants should have in-depth knowledge of the latest trends and technologies in energy efficiency and decarbonization. Applicants should be familiar with all the Clean Energy Solutions included in Clean Energy Lives Here (also listed below) so that they can create tailored content for property owners and renters, including technology content and navigating incentives and financing. Applicants should include current staff that possess this expertise.
 - 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.
 - Community Choice Electricity/Municipal Aggregation.
 - 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 renters and property owners in Massachusetts.

5. ESTIMATED TIMELINE

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

RFP Posted	September 11, 2024
Questions due to MassCEC via email to marketing@masscec.com	September 24, 2024
Questions with Answers Posted to MassCEC Website	September 27, 2024
Proposals Due	October 10, 2024
Interviews of Top Applicants	Late October 2024
Notification of Award and Contracting	Early- Mid November 2024

6. Scope of Work

TASK 1: MARKET RESEARCH

Conduct comprehensive market research to provide the information and analysis necessary for MassCEC's CELH campaign to help renters and property owners pursue Clean Energy Solutions. We are particularly interested in renters from environmental justice populations and the property owners who rent to them.

Taks 1a) Literature Review

Complete a literature review of relevant resources and other examples of successful outreach to 1) renters and 2) property owners. The literature review should include Massachusetts-focused resources (webpages, infographics, tools, training, etc.) and programs (including incentives) promoting property owner and renter adoption of Clean Energy Solutions, including Mass Save's Community First Partners and All In Energy. The literature review should also cover property owner and renter education and outreach efforts and programs from peer jurisdictions (e.g., CA, NY, D.C.) and national entities (Rewiring America, Rocky Mountain Institute, the Switch is On). Finally, the literature review should cover the applicability of State and Federal Incentives and Programs to 1) renters and 2) property owners, such as Mass Save, Utility programs, MOR-EV, and other state and federal Programs

Task 1b) Demographic Analysis

Compile a demographic analysis of 1) renters and 2) property owners in Massachusetts, leveraging existing datasets, such as Census data on age of head of household and household income. The demographic analysis focus on renters in one-to-four-unit buildings, with a particular focus on environmental justice populations. The selected Applicant will identify common "personas" for Massachusetts renters in one-to-four-unit buildings (e.g., students, working age individuals, families, non-related roommates) to inform content creation.

MassCEC recognizes that compiling a demographic analysis on property owners will be more challenging. The selected applicant should compile as much information as possible about property owners of rental housing in Massachusetts, especially property owners of one-to-four (1-4) unit buildings. If desired, and with approval from MassCEC, the selected Applicant may select one (1) or more target geographies to do deeper demographic analysis of property owners. The selected Applicant should create common personas for Massachusetts property owners (e.g., owner-occupant of small multifamily property and owner of a portfolio of rental properties, with and without a property management firm) and identify personas of property owners of one-to-four (1-4) units buildings that are more likely to adopt Clean Energy Solutions to inform content creation.

Task 1c) Surveys, Focus Groups, and Interviews

As needed to inform Task 2 (Content Creation), the selected Applicant will conduct market research through methods such as surveys, focus groups, and interviews. Target audiences include Massachusetts-based renters, landlord associations for one-to-four-unit buildings, renter advocacy organizations, community-based organizations, and other relevant groups. MassCEC will provide the selected Applicant with a list of potential groups to contact and Applicants may suggest additional entities for outreach. MassCEC recognizes that work can be resource intensive. Since MassCEC is requesting that the majority of the budget is allocated to Task 2 (Content Creation), competitive Applicants will bring an existing understanding of adoption of Clean Energy Solutions by renters and property owners and/or strategic plans for how to cost-effectively conduct this market-research.

The market research will address, but not be limited to, the following topics:

- Which Clean Energy Solutions are the most applicable and appealing for 1) renters and 2) property owners.
- Successful strategies for property owner-renter coordination for adopting Clean Energy Solutions.
- Customer journey for identified 1) renter and 2) property owner personas (i.e., gateway Clean Energy Solutions, order of installation, challenges).

This outreach may be used to identify candidates for case studies or profiles.

Task 1 Deliverables:

Deliverable	Due Date
Initial draft of Market Research Summary of Task 1a-1c findings in slide deck format	Within three (3) months of contract signing
Final draft of Market Research Summary (incorporating MassCEC feedback). In addition to the slide deck of the Market Research Summary, the selected Applicant should provide relevant appendices such as examples of collateral from other campaigns targeting renters and/or property owners, datasets, and detailed survey results.	Within four (4) months of contract signing

TASK 2: CONTENT CREATION

Based on the learnings from Task 1, the selected Applicant will help MassCEC and its CELH marketing agency create a better customer journey for 1) renters and 2) property owners. Additionally, the selected Applicant will develop well-researched, engaging content tailored for Massachusetts renters and property owners. Content may include new webpages, articles, case studies, interactive tools and/or other resources for CELH.

Task 2a) Advise on improved CELH Renter/Property Owner Customer Journey

The selected Applicant will create a proposal for an improved customer journey for renters and property owners on the Website. The selected Applicant should submit a proposal for how to improve the customer journey on the Website with one or more options (“Initial Proposal”) and refine a final plan based on feedback from MassCEC and our Clean Energy Lives Here marketing agency (“Final Plan”). The Final Plan should include a new webpage sitemap for the Website. Any changes to the Website will be implemented by the Clean Energy Lives Here marketing agency, but the selected Applicant should be prepared to provide feedback on preliminary layouts, designs, and navigation involving property owner and renter content.

Task 2b) Develop New CELH Renter/Property Owner Content

In addition to the improved customer journey for renters and property owners described in Task 2a, the Initial Proposal should include options for new content creation targeting renters and property owners. Selected Applicants should plan to deliver content for at least ten (10) new webpages and at least ten (10) articles and create two (2) new case studies of renters and two (2) new case studies of property owners or an equivalent level of content.

After incorporating feedback from MassCEC and MassCEC’s CELH marketing agency, the selected Applicant should provide a Final Plan that includes the specific new content that will be created.

The selected Applicant should then create the new content. Although MassCEC’s CELH marketing agency will put all the new content on the Website, the selected Applicant should deliver the new content in a web-ready format, and coordinate with MassCEC’s CELH marketing agency to ensure that the content is presented in a format consistent with MassCEC’s existing webpages and brand standards.

Task 2 Deliverables:

Deliverable	Due Date
Initial Proposal with options for improved customer journey and CELH website content for 1) renters and 2) property owner.	Within four (4) months of contract signing
Final Plan incorporating at least one (1) round of feedback from MassCEC and MassCEC’s CELH marketing agency mapping out the new customer journey for 1) renters and 2) property-owners on the Website and outlining the new content that the selected Applicant will create.	Within five (5) months of contract signing
Develop new, web-ready content for renters and property owners, as outlined and approved by MassCEC in the Final Plan	To be determined in the Final Plan, preliminary target of within ten months of contract signing

TASK 3: MISCELLANEOUS

MassCEC suggests that Applicants leave at least Twenty Thousand Dollars (\$20,000) for miscellaneous or unexpected tasks that may arise. Miscellaneous tasks will be agreed upon in writing (email acceptable) with defined budget and deliverables.

7. HOW TO APPLY

MassCEC must receive responses to this RFP no later than Thursday, October 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 marketing@masscec.com. Proposals should be in a single PDF document. "Property Owner & Renter Content" must appear in the email subject line.

Please include a brief summary of you or your organization's commitment to DEI and/or EJ principles. If available, please provide or link to any relevant materials (e.g., organization guidance documents, mission/vision statements, etc.). You may also include brief examples of initiatives, projects, or other work in which the Lead Applicant and/or Project Partners have demonstrated a clear commitment to advancing DEI and/or EJ principles.

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 6 (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
- Two (2) 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.

8. 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 6?
 - 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 renters and property owners in the Commonwealth, especially from or serving environmental justice populations?
 - Does the Applicant demonstrate strong communication and interpersonal skills to enable the Applicant to communicate Program goals, deadlines and expectations with the MassCEC team?
 - Has the Applicant provided strong references and recommendations?
 - 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?
- **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 MA residents, especially a diverse array of property owners and tenants?
 - Has the Applicant demonstrated sufficient creativity and flexibility to support the Program?

9. Budget

MassCEC anticipates contracting with the selected Applicant for up to Two Hundred Thousand Dollars (\$200,000) to conduct market research on Massachusetts renters and property owners and create additional content for Clean Energy Lives Here, as determined by MassCEC, as detailed in Section 6. While MassCEC is not setting specific budget amounts or limits for Tasks 1 & 2 described in Section 6, MassCEC anticipates that the majority of the budget will be allocated to Task 2 (Content Creation). Additionally, \$20,000 should be reserved for Task 3 (Miscellaneous).

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 selected Applicant 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.

10. Contact Information for Questions

marketing@masscec.com

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. 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.

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 C which will set forth the respective roles and responsibilities of the parties.