



Request for Proposals:
Massachusetts Solar for All
Decision-Support Provider

Date of Issue: April 14, 2025
Proposals Due: May 23, 2025

Total Funding Available: \$2,700,000

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

I. SUMMARY

The Massachusetts Clean Energy Center (“MassCEC”) is seeking entities (“Applicants” or “Provider(s)”) to apply to assist owners and occupants (“Residents”) of one-to four-unit residential buildings in evaluating and accessing the economic benefits of solar via the Massachusetts Solar for All (“MASFA”) financial assistance initiatives. Assistance will take the form of individualized, one-on-one decision support to Residents. Providers will be prepared to handle sensitive and confidential details such as income and tax information. The selected Provider will simplify the solar project customer journey for Residents and act as an unbiased resource for broad customer questions about solar technology, incentives, and ownership/financing options. The Provider will become acutely familiar with the goals, eligibility requirements, and technical details of MASFA financial assistance programs to provide Residents with advice on the most appropriate and economically beneficial pathway for adopting solar energy.

Section 134(a)(1) of the Clean Air Act directs that Solar for All Recipients use funds for financial assistance and technical assistance “to enable low-income and disadvantaged communities to deploy or benefit from zero-emissions technologies.” As such, top applicants for this technical assistance program will have experience working with SFA-eligible populations as presently defined by the EPA (Section III).

MassCEC seeks a Provider who will be able to quickly establish and implement initial components of the decision support program and adapt as the MASFA Program Administrators roll out additional financial support programs over the coming year.

This RFP seeks proposals to provide services for up to 5 years with a total budget up to \$2,700,000.

II. ABOUT MASSCEC

The Massachusetts Clean Energy Technology Center (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 an organization where everyone is welcomed, supported, respected, and valued. We are committed to incorporating these principles in all aspects of our work in order to promote the fair distribution of the health and economic benefits of clean energy. MassCEC strives to lead and innovate in clean energy and climate solutions.

III. PROGRAM GOALS AND DESCRIPTION

PROGRAM CONTEXT

Massachusetts has received a \$156 million, five-year award from the Environmental Protection Agency (“EPA”) to launch the MASFA program, which aims to expand access to clean and affordable solar energy to low-income and disadvantaged communities in Massachusetts. The MASFA Coalition, consisting of the Department of Energy Resources, MassCEC, Massachusetts Community Climate Bank, and Boston Housing Authority, will utilize federal funds to develop and administer core residential solar PV initiatives in low-income and disadvantaged communities. These include zero-interest solar loan and solar lease initiatives for single-family homes, third-party and direct ownership initiatives for solar systems on public and private affordable multifamily housing properties, and low-income community shared solar initiatives that deepen community solar benefits to eligible subscribers.

MASFA Program Administrators have designed multiple program types to support Residents with different needs. Services sought under this RFP will support implementation of the MASFA financial assistance initiatives by directly engaging with prospective program participants and helping them identify the pathway that best meets their needs. As part of such, the Provider may be asked to assist residents with understanding their own tax liability, and how that impacts their ability to leverage federal and state tax credits. This information significantly impacts system economics and may help determine which MASFA pathway is the best fit. **The provider will not provide specific tax advice, nor will they be responsible for looking up tax documentation or income verification.**

This technical assistance offering is targeted toward Residents of single or small-multifamily housing, rather than businesses, developers, or large multifamily housing owners. MassCEC initially projects approximately 5,700 participants of the MASFA small residential financial assistance programs, collectively, though actual participation will depend on system costs, installer engagement, and resident education among many factors.

Actual engagement volume with this service is difficult to predict as some residents may utilize this service and choose not to move forward with financial assistance through MASFA programming, while other program participants may feel comfortable proceeding with a project without consulting this service. The goal of the coalition is that all participants of MASFA

Small Residential initiatives thoughtfully consider what ownership structure best suits their circumstances and have the support available to help them make that decision. As such, the scope of this provider may be adjusted based on actual engagement rates to maximize impact and use of available budget.

A separate “Educational Materials” Provider will create resources to be leveraged by the Decision Support Provider in their engagements with Residents. Applicants are welcome to apply to multiple concurrent MASFA procurements, if their skillsets align with both solicitations.

SOLAR FOR ALL-ELIGIBLE POPULATIONS

Eligible populations are currently defined by the EPA as “Low-Income and Disadvantaged Communities” (LIDAC).

For the purposes of the MASFA Small-Residential Financial Assistance Initiatives, the “Geographically Dispersed Low-Income Households” definition of LIDAC will be used. This is defined by the EPA as follows:

“Low-income individuals and households living in Metropolitan Areas with incomes not more than 80% AMI or 200% FPL (whichever is higher), and low-income individuals and households living in Non-Metropolitan Areas with incomes not more than 80% AMI, 200% FPL, or 80% Statewide Non-Metropolitan Area AMI (whichever is highest). Federal Poverty Level (FPL) is defined using the latest publicly available figures from the U.S. Department of Health and Human Services. Area Median Income (AMI) is defined using the latest publicly available figures from the U.S. Department of Housing and Urban Development (HUD). Metropolitan Area and Non-Metropolitan Area are defined using the latest publicly available figures for county-level designations from the Office of Management and Budget. Statewide Non-Metropolitan Area AMI is defined using the latest publicly available figures from the U.S. Department of the Treasury’s CDFI Fund, with an adjustment for household size using HUD’s Family Size Adjustment factor.”

MASFA intends that program eligibility will be revised annually as these thresholds change. More information on MASFA-eligible communities can be found on the [MASFA website](#).

PROVIDER GOALS

The goals of this Provider are to:

- Support residents in understanding opportunities for solar and potential benefits;
- Help Residents navigate the suite of MASFA financial assistance initiatives and choose the most appropriate pathway to meet their needs;

- Help Residents understand and navigate categorical/proxy eligibility for MASFA initiatives;
- Provide guidance on available federal and state tax credits and incentives, including how to access them, when applicable;
- Help Residents understand applicability, sequencing, and costs/benefits of stacking complementary residential decarbonization programs (e.g. MASFA enabling home upgrade grants, MCCB Energy Saver Home Loan, Mass Save HEAT Loan and rebates, etc.);
- Assist residents in navigating installer selection and help share available guidance on best practices for selecting providers; and
- Support residents with additional questions and needs, including helping direct them to resources to resolve issues with the Program, installers/lease providers, and more.

IV. ELIGIBILITY

MassCEC is seeking a qualified Vendor or Vendor Partnership to provide services under this RFP. For the purposes of this RFP, the Provider is referred to as a singular entity. However, MassCEC will look favorably on applications that engage local/community-based partners to provide region or topic specific support as part of a Vendor Partnership under this offering.

Teams with multiple entities should have one (1) entity that is responsible for organizing the team and proposal (“Lead Applicant”). For the sake of this RFP, the term “Applicant” may refer to either a single entity or a Lead Applicant with one (1) or more Project Partners. Applicants may be companies/non-profits with multiple employees, professional contractors, sole proprietors, individuals, or a team of such entities.

Given the nature of Massachusetts Solar for All programming, preference is given to applicants based in Massachusetts or with strong experience working in Massachusetts.

Applicants must have experience with or the ability to implement the areas of expertise listed below:

- **Meaningful engagement with SFA-Eligible Populations (as defined by EPA) (Section III).**
 - Experience implementing programs that serve residents facing high energy burdens and barriers to solar PV adoption.
 - Ability to build trust with eligible populations.
 - Ability to implement communications strategies tailored to the needs of eligible populations.
- **Technical Expertise:** Applicants should possess familiarity with solar PV and distributed generation technologies to effectively answer high-level questions about the products.
 - The Provider should be able to delineate the differences between options to best assist Residents in making informed decisions on solar offerings.

- The Provider should be comfortable helping Residents navigate incentives/financing options and best practices on contractor engagement.
- **Program implementation:** Applicants should have a demonstrated history of successfully supporting equitable and inclusive programs, including:
 - Managing budgets and timelines and implementing metrics tracking;
 - Professional and technical writing;
 - Hiring and training new staff; and
 - Providing detail-oriented and timely work.
- **Translation and Transcreation:** To ensure access for Solar for All-eligible populations, applicants should have the capability of offering services in – at the least– English and Spanish. If Applicants do not currently possess this capability, they may describe plans to incorporate this need into the capacity building period.
 - Applicants should identify all languages in which they can provide service.
 - Applicants that offer services in the top five languages in Massachusetts will be evaluated favorably.
- **Outreach & Engagement:** Applicants should have the ability to support outreach and engagement efforts led by complementary MASFA partners, as directed by adjustments to the scope of this provider in response to actual engagement rates.

V. ESTIMATED TIMELINE

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

Release of RFP	April 14, 2025
Questions due to MassCEC via email to solar@masscec.com	April 25, 2025
Questions with Answers Posted to MassCEC Website	May 9, 2025
Proposals Due	May 23, 2025
Interviews of Top Applicants	May-June, 2025
Notification of Award	June 2025

VI. SCOPE OF WORK

MassCEC seeks a Provider who can quickly establish and implement initial components of the decision support program and adapt as the MASFA Program Administrators roll out additional financial support programs over the coming year. MassCEC anticipates that the Decision-Support Program will launch Summer of 2025, coinciding with the launch of MASFA Small Residential Financial Assistance Initiatives. Applicants may propose additional tasks that they deem necessary to build a successful program in achievement of the Provider Goals.

TASK 1. SCOPING AND CAPACITY BUILDING

Prepare the infrastructure, systems, and staff necessary to launch the Program.

- Conduct an initial meeting with MassCEC to discuss goals and refine the Provider's scope. Determine common resources and assistance to be provided, establish expectations for staffing, and finalize metrics associated with the funding.
- Establish customer intake/inquiry response plan, process, and format.
- Coordinate with complementary residential decarbonization programs to understand potential customer journeys and ensure consistent/strategic approach to guidance and referrals.
- Map anticipated staff plan and staff responsibilities. Increase capacity of organization as needed for the project deliverables.
- Develop strategy to collect, maintain, and report necessary data about engagements in alignment with KPIs and MassCEC's federal reporting obligations.

In their application, Applicants should propose their approach to capacity building including anticipated hiring needs, approach to training, infrastructure build-out, and timeline. Applicants that feel they are strong providers but are unsure if they could build out capacity on the aforementioned timeline should write their proposal with an anticipated timeline to reach full capacity, while also noting what services the applicant would be able to provide on the aforementioned timeline.

Deliverable: Memo outlining the Provider's scope, inquiry response plan and process, staffing plan with distribution of responsibilities, and data collection/maintenance/reporting strategy.

TASK 2. RESIDENT DECISION SUPPORT

Applicants should be prepared to support Residents through understanding the opportunities and benefits of solar, assessing MASFA program eligibility, navigating solar options for their home, providing guidance on incentives and ownership pathways, identifying complementary solutions and programs, and providing best practices for engaging contractors and providers.

The majority of support is anticipated to be virtual. In the interest of accessibility, Applicants should be prepared to offer multi-lingual services (as described in Section IV) and work with Residents who may have limited internet access or comfort with technology.

Applicants should propose customer-centric formats for assistance that offer user-friendly ways for Residents to receive decision-support. Applicants should include how they would serve Residential Customers with limited internet access.

Applicants may propose formats that cap the available support from the Provider, so that if demand significantly exceeds the proposed resources, Residents are not frustrated by unexpected lack of response. For example, Applicants may propose a limited number of scheduled consultation slots.

If demand for decision-support exceeds the available capacity and budget of the Provider, the issue should be flagged in the bi-weekly updates (see Program Management and Reporting), and the volume of unanswered inquiries should be tracked. Any strategies to cap the available support from the Provider must be approved by MassCEC before implementation.

The full scope of services will be finalized during Task 1. Potential support activities include but are not limited to:

- **Solar Landscape Education and Analysis**
 - Answer general questions on solar and distributed generation technology.
 - The Provider will be expected to leverage educational materials provided by MassCEC. These include MassCEC's [Clean Energy Lives Here](#) website and MASFA-specific educational materials.
 - Provide guidance on the landscape of ownership options, including information on the benefits and key risks of respective ownership pathways such as solar loans, solar leases, and community solar.
 - Help residents consider potential factors and limitations such as:
 - Transformer upgrades
 - Roof limitations
 - Ability to access the Federal Residential Renewable Energy Tax Credit and Massachusetts Residential Energy Credit
 - Need/desire for transferability should a resident move
 - Credit score and impact of debt
 - Need/desire for energy storage
 - Operations and Maintenance (O&M) costs
 - End-of-life procedures and costs for direct-ownership systems
 - Insurance for installer/manufacturer bankruptcies.
- **Individual Decision Support**
 - Navigate customer-specific solar system economics.

- Help Residents evaluate tax credit incentives, system payoff, and potential limitations to determine the most economically beneficial and personally appropriate solar ownership pathway.
 - This task may involve reviewing a Resident’s general income and tax liability to determine their ability to access tax credits, should that information be explicitly given to the Provider. However, **it will not involve tax documentation lookup or providing specific tax advice.**
 - Provide guidance and direction on the landscape of MASFA financial assistance programs.
- Provide guidance on categorical/proxy eligibility for MASFA programs.
 - Help Residents understand how enrollment in federal and state low-income assistance programs (e.g., LIHEAP, WAP, low-income rate codes) enables eligibility for MASFA initiatives. **This task will not involve income verification.**
- Refer or provide resources to Residents about other residential decarbonization programs or solutions, if applicable.
 - Help residents understand how to sequence or stack multiple program offerings (e.g. Mass Save HEAT Loan, MCCB Energy Saver Home Loan, etc.), if applicable.
 - Ensure residents understand the impact of participation in multiple concurrent programs (e.g. multiple payments, changes in debt-to-income ratios, etc.).
- **Post-Decision Support**
 - Refer Residents to the MASFA program application for their appropriate financing and ownership path.
 - Offer best practices on contractor engagement and consumer protection for the appropriate financing and ownership path.
 - For direct-ownership projects, provide guidance on how to access tax credits by directing residents to appropriate IRS forms and completion assistance.
 - **The Provider will not provide direct completion assistance.**
- **Documentation of Engagements and Resident Follow-Up**
 - Track all resident engagements with a mutually-agreed-upon set of data elements to be finalized during Task 1. This data will be provided to MassCEC bi-weekly in fulfillment of Task 2 deliverables.
 - Conduct brief exit surveys after engagements to assess the value of decision support services and refine approach based on resident feedback.
- **Alternate: Outreach and Engagement**

- At MassCEC's discretion and in conversation with the selected Provider, this scope may be amended to include support for outreach and engagement efforts led by complementary MASFA partners.

In their application, Applicants should propose their approach for offering decision-support services, including format, scheduling, practical approach for responding to inquiries, and any intended follow-up. Applicants may propose elements of a decision support approach not explicitly detailed in the bullets above, should they be impactful for the goals of this service.

Deliverable: *Biweekly summary of Resident engagement data and associated staff time (frequency negotiable at discretion of MassCEC).*

- *The format and specifications for this deliverable will be finalized collaboratively during Task 1 and may be templated with the oversight of MassCEC. Granting MassCEC active access to summary engagement metrics (e.g. via live data dashboards), accompanied by separate documentation of billed staff time for invoices, may be an acceptable alternative, at the discretion of MassCEC.*

TASK 3. PROGRAM MANAGEMENT AND REPORTING

Track and evaluate the implementation of the Program and provide regular updates to MassCEC on Program Implementation.

- Attend bi-weekly check-ins with MassCEC staff.
- Work collaboratively with MassCEC to iterate Decision Support program design as needed.
- **Quarterly and Annual Reporting**
 - Quarterly and annual reports will be used to aggregate data tracked in the bi-weekly outlines of customer engagements. These reports will help assess program design in the context of programmatic outcomes and trends.
 - Following the approved data collection, maintenance, and reporting strategy developed in Task 1, the Provider will generate quarterly updates of engagement-related data. These reports will align with MassCEC's federal reporting obligations. Metrics and reporting requirements will be finalized during Task 1. Reports may include:
 - Aggregated data from biweekly outlines of customer engagements, with takeaways. Examples may include:
 - Percentage of resident engagements conducted at each stage of customer journey
 - Percentage of residential customer engagements conducted in a non-English language, by language

- Percentage of residential engagements conducted in each format
- Geographic distribution of engagements
- Most common obstacles
- Trends of MASFA financial initiative referrals
- Qualitative takeaways from customer survey. Examples may include:
 - Key lessons or insights to inform broader MASFA efforts
 - Necessary areas of program re-design
- Provide annual report on progress toward goals established in Task 1, successes of the program, and difficulties or areas of growth.

In their application, Applicants should propose their high-level approach for metrics tracking and/or iterative program management and design. If not covered in the statement of qualifications, Applicants should indicate how their existing processes or infrastructure for metrics tracking and reporting would support fulfillment of this task.

Deliverables: *Quarterly updates (frequency adjustable at discretion of MassCEC); Annual report on progress.*

VII. HOW TO APPLY

MassCEC must receive responses to this RFP no later than 5PM EST on May 23, 2025. 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 solar@masscec.com. Proposals should be in a single PDF document. “Decision Support Provider” should appear in the email subject line.

Please include in your proposal:

- **Attachment A:** Authorized Applicant’s Signature and Acceptance Form
- **Attachment B:** Application Form, including
 - Narrative describing qualifications listed in Section IV: Eligibility
 - Proposed approach to tasks described in Section VI: Scope of Work
 - References
 - Budget form, including an hourly rate table for staff that will work on this scope of work
- **Staff Qualifications:** All responses must include resumes of key individuals who would be developing and managing this scope of work.
- **Relevant work sample (optional):** Applicants with a relevant work sample, summary report, or case study that is helpful to display their qualifications may submit this along with their application.

Please review and be prepared to sign Attachment C (Sample Agreement). Any requested change to the Attachment C (Sample Agreement) should be marked within Attachment B

(Application Form) with detailed explanations. Any requested changes shall be negotiated at MassCEC's sole discretion.

MassCEC is interested in understanding the composition of its applicant and awardee pool for internal information and potential reporting purposes. **Optionally, Applicants are encouraged to complete the [30-second self-assessment](#) as part of the Certification Program for the [Supplier Diversity Office of Massachusetts \(SDO\)](#).**

Applicants who choose to complete the SDO self-assessment tool are encouraged to provide a screenshot or printout of the results page with their application packages. This is not a requirement, but applicant submission of the SDO questionnaire will help MassCEC better understand the composition of our applicant base. Any reporting on applicant or awardee demographic metrics will be anonymized.

VIII. SELECTION CRITERIA

Applications will be judged in the following four areas:

Experience and Qualifications

- To what extent does the Applicant demonstrate the eligibility criteria outlined in Section IV?
- Has the Applicant successfully completed projects relevant to the proposed work?
- Does the Applicant have the experience and qualifications to develop an approach that will serve residents from SFA-eligible populations in the Commonwealth?
- What is the quality of the Applicant's performance on similar past products or their achievements related to proposed work? How was the quality evaluated?
- Does the Applicant have relationships with SFA-eligible communities in Massachusetts that could lend toward region-specific support and relationship building?

Completeness of Proposed Approach

- Does the Applicant plan to provide services commensurate with the Tasks requested by MassCEC in Section VI?
- Has the Applicant's proposed approach demonstrated insight into the Program Goals?
- Has the Applicant recommended any insightful additional approaches that could add to the value of their work?

Cost Competitiveness

- How do the Applicant's hourly rates and overall cost compare to other Applicants?
- How does the Applicant's proposed maximum fee compare to MassCEC's budgeted amount 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 Program?
- Has the Applicant demonstrated an ability to meaningfully engage with and communicate effectively to potential program participants?
- Has the Applicant demonstrated their ability to incorporate region or topic specific insights into their work or thoughtfully engaged local partners to support those goals.
- Has the Applicant demonstrated sufficient creativity and flexibility to support the demands of adaptability that the MASFA program may require?

IX. BUDGET

MassCEC anticipates initially contracting with the selected Provider for up to 5 years to implement the Program over the anticipated 5-year active period of the MASFA financial assistance initiatives. There is an available budget of up to \$2,700,000 for this Provider over the life of the program.

While MassCEC is not setting specific budget amounts or limits for each Task described in Section VI, the majority of the budget should be allocated to the “Resident Decision Support” Tasks.

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

MassCEC anticipates that the Provider will be paid for time (billed hourly) and materials as applicable, not to exceed an agreed upon maximum per Task. Respondents may offer alternative pricing structures, as long as the budget is itemized and covers the full scope of work. If proposing an alternative pricing structure, applicants should note this on the budget form within Attachment B and include a separate attachment with a proposed budget and structure in their application.

MassCEC initially projects approximately 5,700 participants of the MASFA small residential financial assistance programs, collectively, though actual participation may vary in total volume and distribution across the multi-year duration of the program. The goal of the coalition is that all participants of MASFA Small Residential initiatives can consider the question of what ownership structure best suits their circumstances and will have support available to help them make that decision. Actual engagement with this service may vary.

X. CONTACT INFORMATION FOR QUESTIONS

solar@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.

Please note: consultant rate sheets will be considered a public record subject to disclosure.

DISCLAIMER & WAIVER AUTHORITY

MassCEC is closely monitoring developments at the federal level that may impact the operations of, or the availability of funding for, the MASFA program. Circumstances outside of MassCEC's control may require that we delay, or cancel, awarding funds under this RFP.

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.