



Request for Proposals
2019 HeatSmart Massachusetts
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1. Summary

The Massachusetts Clean Energy Center (“MassCEC”), in conjunction with the Massachusetts Department of Energy Resources (“DOER”), is releasing this request for proposals (“RFP”) to Massachusetts cities and towns to apply to participate in the HeatSmart Massachusetts Program (“HeatSmart Mass” or the “Program”). HeatSmart Mass is a community-based outreach and education program that will encourage clean heating and cooling technologies that include air-source heat pumps, ground-source heat pumps, modern wood heating, and solar hot water. The Program aims to help 1) drive down the installation cost and 2) increase deployment of residential and small-scale commercial clean heating and cooling installations through a group purchasing model. HeatSmart Mass is modeled on the highly successful [Solarize Massachusetts](#) program, which is now in its eighth year and has served 66 communities and resulted in over 3,300 contracts and 22.3 megawatts of solar photovoltaic projects. For reference information on the pilot round of HeatSmart, please visit the [HeatSmart Mass Pilot website](#). MassCEC and DOER anticipate selecting up to six (6) municipalities or groups of municipalities to participate in HeatSmart Mass. If there is benefit to pooling resources or efforts, cities and towns may form partnerships and respond to this RFP as a group, as long as each municipality within the partnership is located adjacent to at least one other municipality in the partnership (i.e. they are contiguously located). An applicant municipality or multi-municipality partnership is referred to as a “Community” in this RFP. Each Community will select one or more of the clean heating and cooling technologies to promote as part of HeatSmart Mass.

A Community does not need to be a designated Green Community or have participated in the Solarize Massachusetts Program in order to participate in HeatSmart Mass. Applications will be evaluated competitively.

2. Program Description

A. Program Goals

In Massachusetts, heating accounts for approximately 30% of all greenhouse gas emissions. It is also the largest household energy expenditure for most households, commonly thousands of dollars per year, especially in areas with higher cost heating fuels and inefficient building stocks. Clean heating and cooling technologies directly use or amplify renewable thermal energy and can often result in significant cost savings compared to traditional fossil fuel heating systems.

The aggregation of multiple small-scale clean heating and cooling installations within a Community provides opportunities to realize economies of scale for installers, which can translate to cost

savings for the customer. By educating and engaging the local members of a Community, streamlining marketing efforts, and aggregating sales, the Program will help drive down the cost of clean heating and cooling projects and make them more accessible for residents.

The goals of the HeatSmart Mass Program include:

- Increase education and awareness of clean heating and cooling technologies;
- Reduce costs associated with the purchase and installation of clean heating and cooling projects; and
- Increase local adoption of clean heating and cooling technologies, including in historically underrepresented groups, which include low-/moderate-income households and rental housing.

B. Program Process

A proposed timeline for the Program is provided below. Further explanation of the process is provided in the text below. **Please note that this is an estimated timeline and dates are subject to change.**

HeatSmart Mass Milestone	Tentative Timeline
MassCEC/DOER Review of Community and Technical Consultant Proposals	September-October 2018
Announce Selected Communities and Technical Consultants	October-November 2018
HeatSmart Mass Community Volunteer Training	October-November 2018
Promotion of Energy Audits within Selected Communities	From Community selection until the start of the customer sign-up period
MassCEC launches RFP for Installers	October-November 2018
Communities, Technical Consultant, and MassCEC Review and Score Installer Proposals	December 2018
Community-Installer Interview Day	December 2018
Announce Selected Clean Heating & Cooling Installers	January 2019
Outreach Strategy Development with Installer	January 2019
Customer Sign-Up Period Begins	February 2019

Meet the Installer Presentations with MassCEC and Selected Installer	Within 2 weeks of start of customer sign-up period
Customer Sign-Up Period Ends	July 2019
Deadline for Installations	Recommended 1 year after contract signature

Community Selection and Volunteer Training

Through this RFP, MassCEC will competitively select up to six Communities to participate in the 2019 HeatSmart Massachusetts Program based on the criteria in Section 4. Each Community is required designate a Municipal Representative, a lead volunteer for each municipality (“HeatSmart Coach”), and a team of volunteers. As part of the Community selection process, MassCEC will conduct an in-person or phone interview with each applicant Community. Representatives from the Community involved in the interview will include the proposed Municipal Representative and HeatSmart Coach. Additional Community volunteers are welcome to participate, but are not required. MassCEC may ask questions that clarify the volunteer team structure, the proposed marketing and outreach plan, and overall Community interest and ability to host a HeatSmart Mass campaign.

For selected Communities, the Municipal Representative, HeatSmart Coach(s), and core volunteer team will have the opportunity to receive training on the HeatSmart Mass Program and how to answer common questions about their selected clean heating and cooling technologies.

Technical Consultant Selection

Along with the release of this RFP, MassCEC will be releasing an RFP for technical consultants to provide support for HeatSmart Mass (each a “Technical Consultant”). The Technical Consultants will provide technical assistance for installer selection and provide technical support to Communities during implementation of the Program, such as assistance in developing the content for outreach materials, training for Community volunteers, guidance and training to the Communities’ permitting and inspection departments on the selected clean heating and cooling technologies, and program administration, tracking, and analysis.

Promotion of Energy Audits

MassCEC and the selected Technical Consultant will work with all selected Communities between Community selection and the customer sign-up period to encourage residents to complete no-cost Mass Save or municipal light plant energy audits. Energy efficiency measures can allow a

homeowner to install a smaller, less expensive heating system. An audit is a prerequisite to participate in the Program.

Installer Selection

After Community selection, MassCEC will release an RFP for installers to participate in the Program. The selected installers will offer discounted pricing to participating Communities. As part of the installer selection process, selected Communities will appoint a Community review team to review installer proposals that have met threshold technical requirements. See Section 2.C below for more information about the responsibilities and composition of the Community review team. Multiple installers may partner together in the case of small companies that would not have the capacity to apply individually or in the case where a participating Community has selected more than one clean heating and cooling technology. With the support of MassCEC, DOER, and a Technical Consultant, the Community review team will select up to three installers or installer partnerships per technology to invite to one day of scheduled interviews with MassCEC, DOER, the Technical Consultant, and the Community (“Interview Day”). After the completion of the Interview Day, the Community review team, with input from MassCEC, DOER and the Technical Consultant, will select their first choice of installer(s). The number of installers selected per Community will be dependent on the number of installers necessary to provide coverage for all of the Community’s selected clean heating and cooling technologies. MassCEC will then move forward to contract with the installer(s) on behalf of the Community for the duration of the HeatSmart Mass Program.

Outreach, Education, and Marketing

A central goal of the HeatSmart Mass Program is to reduce prices by alleviating some of the marketing and customer acquisition costs associated with small-scale clean heating and cooling installations. HeatSmart Mass will provide several types of outreach and marketing support to participating Communities. The Technical Consultant will conduct a market assessment of the best targets for the campaign to assist the Community volunteer team and the selected installer(s). Each Community will receive a ‘starter kit’ of standardized marketing and outreach materials that will include clean heating and cooling fact sheets, incentive fact sheets, post cards, posters, banners, and t-shirts. Additionally, each Community can request a marketing grant to utilize for Community-specific marketing needs (as approved by MassCEC).

- **Base Marketing grant:** each municipality may request **up to \$5,000** as a base marketing grant.
- **Additional technology adder:** municipalities that are promoting more than one clean heating and cooling technology may request **an additional \$1,000 per additional technology**. For example, if a town is promoting air-source heat pumps, ground-source heat

pumps, and solar hot water, that town could request an additional \$2,000 above the base marketing grant.

- **Affordable access adder:** Municipalities that have a median household income below the state average and/or have at least 25% of their Census block groups that meet the Commonwealth’s environmental justice criteria (data available in this [online PDF](#)) may request **an additional \$2,500** in order to promote energy access to all residents in the Commonwealth. To qualify for this adder, the municipality must demonstrate in their proposal narrative that they have a specific outreach plan to engage low and moderate-income residents or populations encompassed by the environmental justice criteria within that Community. This strategy should ideally be in addition or complementary to their standard marketing and outreach efforts, and may include designating a volunteer or volunteers who will focus on this portion of the Community’s outreach efforts. Budget should additionally demonstrate how these additional funds will be used to support targeted outreach and engagement efforts. Up to \$1,000 of the affordable access adder may be used as a stipend for a single volunteer or subset of volunteers who will focus their efforts on outreach and education to low and moderate-income residents. This may be the HeatSmart Coach, or a separate volunteer or volunteers.
- **Large community adder:** Up to **an additional \$2,500** is available for Municipalities that demonstrate that they have over 10,000 residences and clarify in their proposal and budget how the additional funds will be used to expand targeted outreach and engagement efforts.

Applicant Communities that consist of multiple municipalities may request the amounts described previously for each municipality. Communities do not need to request the entire amount, and MassCEC will pay out the marketing grant in increments no greater than \$2,500. Of the total marketing grant, up to \$1,000 may be used by each municipality as a stipend for the HeatSmart Coach. If the Community wishes to pay the HeatSmart Coach a stipend, it is the responsibility of the participating municipalities to determine the feasibility and administration of remitting such payment. Please see Section 2.C below for more information about the HeatSmart Coach role. Please refer to the [HeatSmart Mass Pilot website](#) for a summary of the marketing plans submitted for the pilot round of HeatSmart Mass Program. Each selected installer(s) will also deploy an outreach and marketing strategy to enhance local interest in the selected clean heating and cooling technologies with input from the Community.

In addition to MassCEC’s marketing and education toolkit, MassCEC and the Technical Consultant will work with the Community to host a “Meet the Installer” presentation, where various stakeholders, including Community and other municipal representatives, MassCEC, the Technical

Consultant, and the selected installer(s) will meet with residents to increase awareness of clean heating and cooling and its benefits.

MassCEC reserves the right to modify the marketing grant award to award less than applied for due to limited budget availability or for any other reason.

Customer Sign-Up Period

Starting around February 2019, interested customers in the selected Community will be able to contact the installer and sign up for a site assessment. Customers with sites that are deemed feasible for a clean heating and cooling project will have the option to contract with the installer before the Program deadline of July 31, 2019. The installer will be responsible for assessing individual sites, working with interested customers to design appropriate systems, and contracting with customers for installation of clean heating and cooling systems. The installer will be responsible for completing each clean heating and cooling installation within one year of application approval.

C. Roles and Responsibilities

HeatSmart Coach

The main role of the HeatSmart Coach is to be the primary contact between MassCEC, DOER, the municipality, and the installer. Communities composed of multiple municipalities will require a separate HeatSmart Coach for each municipality. The HeatSmart Coach will manage the outreach and education efforts of the core volunteer team and additional volunteers. Responsibilities will include:

- Reaching out to local Community organizations, potential partners, and volunteers;
- Organizing volunteer distribution of information and marketing materials;
- Organizing and mobilizing Community networks over the course of the Program;
- After the Meet the Installer session, serving as point person for questions on Program mechanics and basic clean heating and cooling information;
- Developing communication tools unique to the Community (i.e. Facebook page, Google group, etc.); and
- Participating in check-in calls every other week with MassCEC and the installer.

Please review *ATTACHMENT C: HeatSmart Coach Commitment Form* for further details about the HeatSmart Coach requirements. The HeatSmart Coach for selected Communities will be required to sign this document in order to participate. Please note that an individual who works for a clean heating and cooling installer may be part of a Community volunteer team, but will not be allowed to take on the role of HeatSmart Coach, or participate in the installer selection process.

Core Volunteer Team

It is encouraged that Communities not only designate a HeatSmart Coach to manage outreach efforts, but also develop a **core volunteer team** that includes an additional 1 to 4 volunteers per participating municipality. Experience from the HeatSmart Mass Pilot Program has demonstrated that defining the volunteer team structure at the onset of a campaign can be tremendously beneficial because it allows a Community to begin outreach immediately. It is recommended that each individual volunteer be considered for specific outreach efforts based on their interest and skillset. The following are examples of core volunteer roles:

- Chair of electronic communication and/or website;
- Event planning;
- Canvassing;
- Volunteer development;
- Outreach to resident organizations (civic groups, clubs, and places of worship); and
- Person-to-person engagement and outreach.

These roles are not exhaustive and may or may not be applicable depending on Community-specific volunteer team structure. It is also understood that these roles may change or evolve during the course of the Program.

Members of the volunteer team are encouraged, but not required, to complete *ATTACHMENT D: Volunteer Commitment Form*.

As the Community volunteer team is the primary driver of the HeatSmart Program within a Community, the success of the Program is heavily dependent on the planned outreach and education efforts of the volunteers. Based on the Solarize Mass and HeatSmart Pilot programs, it is anticipated that the Community volunteer team may supply a total of 400 to 600 hours during the course of the HeatSmart Mass Program. Whether the volunteer hours were broken up among a large or small group of volunteers, Communities should be aware of this time commitment when applying to participate as part of the HeatSmart Mass Program.

Municipal Representatives

In addition, it is expected that the municipalities will be a supportive resource for the Community volunteer team during the course of the HeatSmart Mass Program. The municipalities may support the local HeatSmart Mass Program in several different ways. First, by applying on behalf of the Community, a municipality is demonstrating support for the HeatSmart Mass Program and the

adoption of clean heating and cooling in general. In addition, the municipality and the Municipal Representative may offer additional support in the following ways:

- Utilizing municipal infrastructure for the benefit of the HeatSmart Mass Program, such as municipal email lists, mailers in tax bills or water bills, municipal press releases regarding the Program, or announcements and links on a municipal website;
- Providing space for community events, such as Meet the Installer presentation, for minimal or no fee;
- Reviewing and streamlining clean heating and cooling permitting process (as applicable);
- Leveraging municipal staff hours or additional funds (as applicable);
- Generally supporting the adoption of clean heating and cooling projects;
- Clarifying the municipal reimbursement process for marketing funds and HeatSmart Coach stipends. Additionally, clarify whether the municipality will reimburse volunteers for pre-approved purchases of marketing materials, including reimbursement for sales tax;
- (Optional) Collaborate with MassCEC and the Technical Consultant on permitting review and streamlining efforts; and
- (Optional) Collaborate with MassCEC and the Technical Consultant on organizing code and safety trainings on selected clean heating and cooling technologies.

These methods of support are not exhaustive and may or may not be applicable in each Community. However, the scope of municipal support will be reviewed as an important aspect of the Community selection process.

Ideally, the Municipal Representative should be a municipal employee. However, MassCEC may allow an individual to hold the position of Municipal Representative if they are not a municipal employee, as long as the Community can verify the following items are accurate:

- Municipality will clarify why a paid employee is not available to manage the position;
- The individual maintains a volunteer position on behalf of the municipality, and is considered a special municipal employee;¹
- Municipality will clarify that they support the HeatSmart Mass Program in their community, and will additionally support the proposed Municipal Representative to conduct their role as noted in this section, and that the individual will have adequate access to request the resources listed above; and

¹ See <http://www.mass.gov/ethics/education-and-training-resources/educational-materials/explanations-of-the-conflict-of-interest-law/special-municipal-employees-summary.html> for more information about Special Municipal Employees.

- The municipality will clarify if the proposed Municipal Representative or a separate municipal employee will remain available as the point person for any questions from the public or press once the HeatSmart Mass Program sign-up period is completed.²

Teaming

Teaming with one or more of the partners listed below is strongly encouraged and will increase the likelihood of selection and eventual campaign success. Team partners recommended with the proposer include, but are not limited to:

- Local financial institutions;
- Local secondary and higher education institutions;
- Local Program Administrators (“PA’s”); or
- HeatSmart Mass Pilot town/s (please visit the [HeatSmart Mass Pilot website](#) to learn which towns participated in the HeatSmart Mass Pilot).

Community Review Team

As part of the installer selection process, selected Communities will appoint a Community review team. The Community review team will be made up of the Municipal Representative, the HeatSmart Coach, and up to two additional representatives selected by the Municipal Representative.³ For Communities that are participating as a group, the Community review team will be comprised of the Municipal Representative and the HeatSmart Coach from each Community. Although MassCEC will launch the installer RFP, the Community review team will be responsible for conducting the installer review, with input from MassCEC and the selected Technical Consultant. The Community review team should be prepared to allocate appropriate time during the installer selection timeframe.

Prior to submitting a proposal, the Community review team, in conjunction with the HeatSmart Coaches and/or Municipal Representative, should conduct local research to create a list of local installers who install the Community’s preferred technology/ies. This list of local installers should be submitted with the proposal and, if the Community is selected, the list will be utilized by MassCEC, DOER, and the Technical Consultant to conduct outreach for the Installer RFP.

² After a HeatSmart Mass program is completed, the Community may receive periodic questions from the public or press about the program. MassCEC does not provide contact information for program volunteers once a HeatSmart Mass program is completed, and therefore will request that either the proposed Municipal Representative or other municipal employee be designated as the point person for these questions.

³ No member of the Community review team can be affiliated (either directly employed or contracted for employment) with a clean heating and cooling installation company.

However, the Community volunteers must not directly contact the installers in regard to the HeatSmart Program or show any preference for particular installers.

- MassCEC maintains a list of installers who have participated in MassCEC rebate programs, these lists can be found per technology here: <http://www.masscec.com/residential/clean-heating-and-cooling>
 - *Disclaimer: MassCEC has not investigated, and expressly disclaims any duty to investigate, any company, product, service, process, procedure, design, or the like, which may be presented on the aforementioned websites. The presentation of these website links does not constitute endorsement, warranty, or guaranty, by MassCEC of any company, product, service, process, procedure, design, or the like. The entire risk of any information presented is assumed by the user.*

D. Selecting Clean Heating and Cooling Technologies

Each Community will select at least one of the technologies listed in this section that it wishes to promote as part of the HeatSmart Mass Program. Selecting multiple technologies will give residents of participating Communities more options to select the clean heating and cooling technology that works best for their home and budget. However, if a Community selects multiple technologies, it will most likely mean working with multiple installers and educating residents on multiple technologies and will require increased work on the part of the Community. MassCEC has no preference for how many technologies each Community selects; it is dependent on the compatibility and capacity of each Community. Communities may also indicate that they are potentially interested in multiple technologies or multiple combinations of technologies and during the Community selection process, MassCEC can work with the Community to determine which technology or combination of technologies best meets the needs of their Community.

Technologies must meet technology and installation requirements for MassCEC’s residential rebate programs, as detailed on the [MassCEC website](#). Clean heating and cooling technologies will likely be more cost-effective compared to electric resistance, propane, or oil for a typical home. Other factors that may make each of these technologies well suited to certain towns are listed below. Links to more information about each technology, are provided below.

- **Modern Wood Heating (“MWH”):**
 - Technology Description:
 - MWH technologies use wood pellets, chips, or cordwood to produce central heat, much in the same way traditional boilers or furnaces use oil, propane, or natural gas.

- MWH systems can often integrate into existing heating distribution systems, and can fulfill all of a home's heating and hot water needs.
 - Pellet and chip systems are fully-automated, do not require manual loading and require limited maintenance.
 - Wood pellet delivery is available in most parts of the Commonwealth, and systems can be designed to require only three deliveries per year.
 - Factors for Suitability:
 - Although there are central modern wood heating furnaces available, most modern wood heaters are boilers which means that they connect to hot water distribution systems.
 - Communities with a high prevalence of hot water heating may be well-suited for this technology.
 - Although wood pellets can be delivered all over the state, Communities with significant forestry resources and/or a high percentage of existing wood heating (i.e. woodstoves) may be well-suited for this technology due to greater connection to the woody biomass supply chain and greater existing familiarity with wood heating.
 - More information: <http://www.masscec.com/learn-about-modern-wood-heating>
- **Air-Source Heat Pumps (“ASHP”):**
 - Technology Description:
 - While traditional systems burn fuel to create heat, ASHPs work by moving thermal energy from outside air into or out of a home.
 - ASHPs are an efficient source of heating and cooling in cold climates like Massachusetts. Specifically, the ASHPs eligible for MassCEC’s residential rebate programs must meet certain cold-climate performance metrics that make them well-suited to providing heating in Massachusetts’ climate.
 - Although they require electricity to operate, efficient ASHPs use 40% to 70% percent less electricity than traditional electric-resistance heating.
 - Factors for Suitability:
 - Because ASHPs operate on electricity, Communities with a high penetration of residential solar photovoltaic energy and/or access to cheaper than average electricity may be especially well suited for this technology.
 - ASHPs can be ductless, providing heating and cooling to individual rooms of the home, or ducted, using existing ductwork to serve as a central heating and cooling system. Most building types can be retrofitted without distribution upgrades, however, communities with newer homes with forced air distribution might also make good fits.

- More information: <http://www.masscec.com/learn-about-air-source-heat-pumps>
- **Ground-Source Heat Pumps (“GSHPs”):**
 - Technology Description:
 - Ground-source heat pumps can provide cost-effective and energy-efficient heating, cooling, and water heating by utilizing the nearly constant temperature underground to heat or cool your home.
 - GSHPs are typically the most efficient type of heat pump. Though they require electricity to operate, efficient GSHPs can provide the same amount of heating for 65% to 75% less than traditional electric-resistance heating.
 - Factors for Suitability:
 - Because GSHPs operate on electricity, Communities with a high penetration of residential solar photovoltaic energy and/or access to cheaper than average electricity may be especially well-suited for this technology.
 - GSHPs typically use forced air distribution, so communities with a prevalence of newer homes or new construction efforts may be good candidates.
 - GSHPs require a minimum of a small yard (at least 1,500 square feet) in order to drill a well for the system. A town with a predominance of parcels with sufficient space for a well may be a good candidate for GSHP campaign.
 - More information: <http://www.masscec.com/learn-about-ground-source-heat-pumps>
- **Solar Hot Water (“SHW”):**
 - Technology Description:
 - A SHW system captures heat from sunlight and circulates the thermal energy to a property’s water tank.
 - Solar hot water systems reduce the usage of traditional water heating fuels (such as oil, electricity, or propane) and thereby reduce the amount spent purchasing these fuels.
 - These systems do not fully replace conventional water heaters, but can provide up to 80% of a building’s total hot water needs. Solar hot water systems may also be installed to supplement a building’s heating system.
 - Factors for Suitability:
 - Households that do not have sufficient roof space for a solar PV system may still have enough roof space for a solar hot water system. For residents who have already installed solar PV, MassCEC offers a \$500 PV co-location adder.
 - Communities with higher-cost heating fuels will also have higher-cost water heating and might be candidates to pair SHW.
 - More information: <http://www.masscec.com/learn-about-solar-hot-water>

3. Requirements and Deadlines

A. Community Eligibility Requirements

In order for a Community to be eligible to submit an application, it must meet the following requirements:

- The Community must either:
 - a) be serviced by an investor-owned utility (Eversource, National Grid, or Unitil) or municipal utility that pays into the Massachusetts Renewable Energy Trust and therefore be eligible for MassCEC’s clean heating and cooling rebates; or
 - b) be serviced by a municipal utility that offers no-cost energy audits and incentives for the selected clean heating and cooling technologies comparable to the MassCEC rebates in order to ensure that the selected clean heating and cooling technologies will be cost effective for residents. MassCEC rebates will continue to only be available to residents of that are served by electric utilities that contribute to the Renewable Energy Trust.
- The Community (either a single municipality or a municipality partnership) must have within its border at least 3,000 owner-occupied residences.⁴ Information on the number of owner-occupied residences by municipality is available from the U.S. Census Bureau: https://factfinder.census.gov/faces/nav/jsf/pages/community_facts.xhtml;
- Municipality partnerships: If there is benefit to pooling resources or efforts, cities and towns may form partnerships and respond to this RFP as a group, as long as each municipality within the partnership is located adjacent to at least one other municipality in the partnership (i.e. they are contiguously located). MassCEC recommends that partnerships should include no more than three municipalities in order to facilitate coordination. However, if a larger group of municipalities with a strong history of collaboration and an existing organizational framework are interested in applying together, MassCEC will work with these municipalities on a case by case basis.
- Note: This section lists the minimum requirements Communities must meet to apply. See Section 4 for a list of the evaluation criteria that MassCEC and DOER will use to competitively select participating Communities.

⁴ See Section 3.A. regarding the requirements for group proposals.

B. Proposal Requirements

Proposals must include all the required information listed in *ATTACHMENT A: Proposal Checklist and Application Form*, including a signed copy of *ATTACHMENT B: Signature and Acceptance Form*. MassCEC is seeking Community proposals with a clear and comprehensive outreach plan and timeline that demonstrates a committed volunteer team, a significant potential for resident interest in participating in the Program, and an engaged municipality. MassCEC will return an application to a Community if any key aspect of the Community proposal or marketing plan lacks clarity or volunteer resources needed in order to make for a successful Program, or does not meet programmatic or timeline requirements. MassCEC may elect to provide feedback to the Community, at which time the Community may elect to re-submit an application that takes any feedback into account.

Proposals for HeatSmart campaigns that are responsive to the Program Goals but utilize a modified program structure will be considered. However, MassCEC reserves the right to deny or request modifications to proposals that are not structured consistent with this RFP.

Upon MassCEC’s authorization to proceed with a proposal, MassCEC and the awarded Community will execute a contract which will set forth the respective roles and responsibilities of the parties. A template MassCEC-Community Contract is attached to this RFP as *ATTACHMENT E: Template Community Contract*. It is essential, in order to meet the Program goals and timelines, that communities are prepared to execute a contract with MassCEC soon after their selection. Therefore, each applicant Community must review the Terms and Conditions outlined in the Community Contract. MassCEC generally does not allow the Terms and Conditions of this contract to be modified. Any questions or concerns regarding these Terms and Conditions must be made at the time of application.

C. Application Deadlines & Contact Information

The timeline for the RFP process outlined below.

RFP Milestone	Date
RFP for Communities Released	July 17, 2018
Deadline to submit Community Questions	August 9, 2018, 11:59 PM
MassCEC to post Community & Technical Consultant RFP FAQ	August 16, 2018
Proposals Due for RFP for Communities	September 16, 2018, 11:59 PM

Please submit all questions to heatsmartmass@masscec.com no later than 11:59 pm on August 9, 2018. “HeatSmart Massachusetts RFP – Community Question” must appear in the email subject

line. Responses to submitted questions, and other frequently asked questions, will be posted by August 16 on MassCEC's website.

MassCEC will host a webinar to provide an overview of each of the technologies and answer questions on August 1, 2018 from 3:30 to 5:00PM. Register for the webinar at:

<https://attendee.gotowebinar.com/register/4302753329880930050>.

Responses to this RFP must be received by MassCEC **no later than 11:59pm on September 16, 2018**. Only complete, timely responses will be considered. Responses to this RFP must be submitted electronically to heatsmartmass@masscec.com. "HeatSmart Massachusetts RFP – Community Proposal" must appear in the email subject line.

4. Evaluation Criteria

Proposals will be evaluated on the criteria below:

- **Overall quality and completeness:**

- Overall quality of proposal; well-thought-out proposal components.

- **Team:**

- Degree of team's outreach experience, breakout of volunteer roles, demonstration of volunteer team capacity to drive the Program and the breadth of partnerships identified in proposal.
- Additional consideration will be given to communities that have an Energy or Sustainability Committee that has been meeting regularly for at least one year prior to the release of this RFP; direct experience with the Solarize Mass and/or Green Communities program; or have municipal experience with the installation of clean heating and cooling technologies.

- **Marketing plan and budget:**

- Overall quality, scope, and creativity of marketing plan and use of grant budget. Plan should incorporate applicable lessons from the Solarize Mass Community Best Practices Timeline in *ATTACHMENT F: Best Practices Guide* and explain where different approaches are being recommended based on the nature of the selected clean heating and cooling technologies, including a greater focus on customer awareness.
- Additional consideration will be given to communities that can provide innovative and effective marketing and educational outreach plans and those who plan to create a HeatSmart Facebook page or leverage an existing Facebook page or other social media forum.

- **Suitability of building stock:**
 - Proportion and total number of households with high cost heating fuels (electric, oil, and propane) located in the Community. Communities can access an estimate the number of households heating with electricity, oil, and propane from the [U.S. Census Bureau](#). For ease of reference, MassCEC has also created an [online map](#) with this data. MassCEC will give preference to Communities that are under a moratorium for the expansion of new natural gas service.
- **Diversity of technologies:** MassCEC will aim to select proposals that in the aggregate represent as many of the four clean heating and cooling technologies as possible, while balancing other evaluation criteria.
- **Geographic diversity:** MassCEC will aim to select Communities from different regions of the state, while balancing the other evaluation criteria.
- **Additional resources:** The extent to which additional resources (both financial and otherwise) are identified and potentially committed to the Program.
- **Promote energy access:**
 - Proposals from municipalities that have a median household income below the state average, have at least 25% of their Census block groups that meet the Commonwealth’s environmental justice criteria (data available in this [online PDF](#)), and/or have proposed a specific and promising plan to target low- and moderate-income residents will be given additional consideration;
 - Proposals from municipalites that have proposed a promising plan to increase adoption within other under-represented sectors, such as within rental housing.
- **Permitting:** Degree to which Community can outline the permitting process for clean heating and cooling projects and identify any process or cost streamlining efforts.
- **Proposed methodology:** Ability of proposal to drive resident awareness and interest in the Program, sign-ups for site assessment, and Community adoption of clean heating and cooling projects. If a modified campaign structure is proposed, the expected benefits of the modified campaign structure against a traditional campaign structure.
- **Group proposal (if applicable):** Demonstrate the advantages to responding to the RFP as a group rather than individual Communities.
- **Installer research:** Demonstate that the Community has researched the installer base in their region for the technology/ies that they intend to install. However, the Community volunteers must not directly contact the installers or show any preference. (See Section C. Roles and Responsibilities for details.)

5. General Request for Response Conditions

A. 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.

B. 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, 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 its 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 a 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.