



# Building Electrification and Transformation Accelerator (BETA): Project Planning\*

## Program Manual

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Applications to the Massachusetts Clean Energy Center's ("MassCEC") Building Electrification and Transformation Accelerator (BETA): Project Planning ("Pilot") will be accepted on a rolling basis.

If funding remains and/or if MassCEC is approved for additional funding, MassCEC will announce future deadlines for application submissions.

The Application Form is available online:

[jotform.com/MassCECForms/beta-project-planning](https://jotform.com/MassCECForms/beta-project-planning)

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\*Formerly known as the Building Electrification Transformation Accelerator (BETA): Commercial Buildings Pilot.



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# 1 Introduction

## 1.1 BETA: Project Planning Overview

The Pilot is a MassCEC initiative that seeks to surface and prove out the technical, implementation, and financial models that will serve as the basis for electrification and decarbonization of the commercial buildings sector in Massachusetts. MassCEC plans to target a diverse cohort of common building typologies to ensure assessments and market facing resources are applicable at scale and are responsive to the range of differences within the state’s commercial sector.

The Pilot is working to establish technical building retrofit best practices for electrification and decarbonization of existing commercial buildings, including large multi-family buildings (“Project Sites”). The Pilot will explore and demonstrate in-depth building audit and energy modeling methods (“Decarbonization Assessment”) to support at least fifteen (15) participating commercial building owners (“Participants”) in planning electrification and decarbonization retrofits of their selected Project Site (“Decarbonization Plan”). The end goal of each Decarbonization Plan developed would be to eventually eliminate the use of fossil fuels from the Project Sites, contributing to the Commonwealth’s 2050 climate goals and interim targets. In the near term, this Pilot will demonstrate replicable, cost-effective approaches to electrifying commercial buildings, including both “all at once” retrofits and “over time” approaches that leverage natural equipment replacement cycles. Through the Pilot, MassCEC aims to create and test an assessment framework that is comprehensive yet also flexible enough to address the wide variety in the commercial building stock.

MassCEC has contracted with Slipstream Group, Inc. to be the Lead Technical Consultant for the Pilot, in addition to subcontractors RISE Engineering, Rocky Mountain Institute, Symmes Maini and McKee Associates, Inc., and TSK Energy Solutions, LLC (collectively, the “Consultant”). The Consultant has been supporting the development of protocols for the Decarbonization Assessments and Decarbonization Plans and Participant selection criteria and will provide Participants with Decarbonization Assessments and Decarbonization Plans for their Project Sites. The Consultant will participate in the review of Pilot applications to assist in selecting a diverse cohort of Participants according to identified building typologies and selection criteria.

The phases of the Pilot are described in Table 1 below. For each Participant, these four (4) phases will collectively be referred to as the “Project”. For more details about these phases and how to participate in the Pilot, see Section 5.

<b>Phase Number</b>	<b>Phase Category</b>	<b>Duration</b>	<b>Description</b>
Phase 1	Application and Awarding	Rolling basis	Applicants will fill out the Application Form, and MassCEC will notify them if they have been selected to participate in the Pilot or not. Selected Participants will submit



			required documentation through the Participant Portal. MassCEC will notify Participants via email. The Consultant will reach out to Participants to schedule a Decarbonization Assessment.
Phase 2	Planning	3 months	The Consultant will conduct an in-person Decarbonization Assessment at the Project Site and work with Participants to review decarbonization strategies. Over the following three (3) months, Participants and the Consultant will create a detailed Decarbonization Plan for their Project Site. The Consultant will provide support as needed.
Phase 3	Market Guidance	3 months	Participants will share feedback about the Pilot. The Consultant will host a workshop with the Pilot building owners and managers to identify challenges and opportunities.

## 1.2 Purpose of the Program Manual

The purpose of this Program Manual is to seek building owners of existing commercial buildings, including large multi-family buildings interested in the Pilot (“Applicants”). MassCEC is looking for Applicants that are committing to decarbonizing their Project Site, either as part of a large renovation project or as a standalone effort, or those seeking to create an “over-time” decarbonization plan, with the goal of making their Project Site fully decarbonized. Applicants do not need to have fully developed strategies to decarbonize their Project Sites since the Consultant will offer technical support.

This Program Manual describes the eligibility requirements, Project requirements, application process, and participation process for the Pilot.

## 1.3 About MassCEC

MassCEC is a state economic development agency dedicated to accelerating the growth of the clean energy sector across the Commonwealth to spur job creation, deliver statewide environmental benefits and to secure long-term economic growth for the people of Massachusetts. MassCEC works to increase the adoption of clean energy while driving down costs and delivering financial, environmental, and economic development benefits to energy users and utility customers across the state.

MassCEC’s mission is to accelerate the clean energy and climate solution innovation that is critical to meeting the Commonwealth’s climate goals, advancing Massachusetts’ position as an international climate leader while growing the state’s clean energy economy. MassCEC is committed to creating a diverse, equitable, and inclusive organization where everyone is welcomed, supported, respected, and valued. We are committed to incorporating principles of diversity, equity, inclusion, and environmental justice in all aspects of our work 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.

## 2 Eligibility Requirements

### 2.1 Minimum Project Site Eligibility Requirements

Project Sites must be one of the following building types in order to be eligible to participate in the Pilot:

- Big box retail
- Commercial office
- Community buildings (e.g., non-profits, assembly, or public service)
- Food service
- Healthcare facilities (e.g., outpatient, inpatient, or community health centers)
- Higher education
- Hospitality and public amenity spaces
- Hotel or dormitory
- Laboratory
- Mixed-use retail, strip malls, and large retailers
- Multi-family housing
- Religious worship
- Retail, service centers, and malls
- Schools (kindergarten through high school)
- Supermarkets
- Warehouses and distribution centers

Project Sites must also meet the following criteria:

- Commercial buildings (not including large multi-family buildings) must be over 20,000 square feet.
- Multi-family buildings must have fifteen (15) or more units.
- Project Sites must be located in a utility territory that contributes to the Massachusetts Renewable Energy Trust. This includes the Massachusetts service territory of National Grid, Eversource, Until, and municipal light plants that have elected to pay into the Renewable Energy Trust (please see [masscec.com/municipal-lighting-plant-communities](https://masscec.com/municipal-lighting-plant-communities) for more information).

MassCEC may on a case-by-case determine if a Project Site that does not meet the above criteria is eligible to participate in the Pilot depending on other building characteristics.

MassCEC's goal is to select one Project Site per Participant to participate in the Pilot but may select two (2) or more Project Sites per Participant pending review of applications received.

### 2.2 Minimum Project Eligibility Requirements

All Projects must meet the following minimum requirements:



- Applicants must own and be the primary decision maker of the Project Site.
- Applicants should be committed to the goal of decarbonizing their Project Site either through an “all at once” or “over-time” approach. During the Pilot, Participants should plan to, at a minimum:
  - Provide access for an on-site Decarbonization Assessment and assist with information gathering such as utility information, maintenance logs, past energy audit reporting, and condition assessments.
  - Review the Decarbonization Plan provided by the Consultant and determine a capital work plan to fully decarbonize their Project Site by 2050.
  - Participate in discussions to provide feedback on planning considerations including system selection, potential barriers and opportunities and financial considerations.
  - Participate in surveys or feedback discussions after Decarbonization Plans have been completed.
- All Projects must be performed in compliance with all local, state, and federal laws and codes.
- Project Sites can be owner or tenant occupied.
- Tenants of the Project Site must be aware of the Pilot and willing to cooperate with the Pilot.
- Applicants and tenants of the Project Site must be willing to cooperate with data gathering and coordination.
  - During Phase 1 (Application and Awarding), Participants will be asked to provide energy bills, including tenant utility data if tenants pay their own utility bills, for two (2) years prior to the Pilot (if available).
    - A sampling of multi-family building utility data may be accepted if aggregate data for the building is not available.
    - Participants will support the collection of utility permission letters or data from tenants or utility providers as needed.
  - During Phase 2 (Planning), Participants will be asked to support the on-site Decarbonization Assessment and work with the Consultant to discuss resiliency, interventions and system selection, potential opportunities, barriers, financial considerations, and other capital planning considerations.
    - Participants must work with any tenants in place to coordinate and manage the impacts of the Decarbonization Assessment and the Decarbonization Plan, including allowing site visits.
      - Access to all commercial tenancy spaces will be required to complete the Decarbonization Assessment.
      - Access to typical residential units will be necessary to complete the Decarbonization Assessment for multi-family buildings.
    - Participants must work with the Consultant to discuss resilience conditions, including vulnerabilities to increased heat, flooding, and other extreme weather, as well as strategies that would make the Project Site more resilient.
  - During Phase 3 (Market Guidance) Participants must be willing to answer interview or survey questions to capture their experience with the Pilot.



- Participants must provide contact information for any tenants in place during the Project.

### 3 How to Apply

#### 3.1 Application Instructions

Applications should be completed online at [jotform.com/MassCECForms/beta-project-planning](http://jotform.com/MassCECForms/beta-project-planning). This online Application Form includes questions about the Applicant and their Project Site. Application progress will be saved so that the application can be completed over multiple sessions. A PDF version of the Application Form is available for reference on the Pilot webpage ([masscec.com/program/beta-project-planning](http://masscec.com/program/beta-project-planning)).

Applications will be accepted on a rolling basis until a cohort of around fifteen (15) Participants has been selected. However, interested Applicants are encouraged to apply early as funding is limited.

If funding remains and/or if MassCEC is approved for additional funding, MassCEC will announce future deadlines for application submissions.

#### 3.2 Applicants' Questions and Answers

Questions concerning the Pilot can be submitted by email to [buildings@masscec.com](mailto:buildings@masscec.com). All inquiries should reference "BETA: Project Planning".

MassCEC will post questions and answers from Applicant's emails in the "FAQ" section of the Pilot webpage ([masscec.com/program/beta-project-planning](http://masscec.com/program/beta-project-planning)). MassCEC will periodically update this list. Applicants are encouraged to visit the website for updates prior to submitting a question. Only answers posted on the website should be treated as MassCEC's official response to any question.

#### 3.3 Selection Criteria

Applications will be competitively evaluated using the criteria in Table 4 below. Applying early is strongly encouraged.

Table 4. Selection Criteria	
Criteria	Sub-Criteria
<b>Minimum Criteria</b>	MassCEC reserves the right to only consider applications that, in its sole judgement, meet the minimum threshold criteria, including: <ul style="list-style-type: none"> <li>• The Application Form is complete and responsive to the Program Manual and application requirements.</li> <li>• The clarity, specificity, and consistency of the application are sufficient to be deemed credible.</li> <li>• The proposed Project Site and Project meets all requirements stated in Section 2.1 and Section 2.2.</li> </ul>
<b>Diversity of Applicants</b>	MassCEC is looking to award a diverse group of Projects, including: <ul style="list-style-type: none"> <li>• Geographical diversity</li> <li>• Building typology (i.e., use, size, age)</li> </ul>



	<ul style="list-style-type: none"> <li>• Existing heating fuel type (e.g., oil, natural gas)</li> <li>• Existing HVAC system distribution type (e.g., packaged rooftop, distributed systems)</li> <li>• Existing hot water system types (e.g., gas or electric, central, or distributed)</li> <li>• Unique characteristics (e.g., ownership structures, commercial kitchens)</li> </ul>
<b>Selection Priorities</b>	<p>MassCEC will prioritize the following when evaluating applications:</p> <ol style="list-style-type: none"> <li>1. How building typology meets the goals of the Pilot for a diverse selection of candidates.</li> <li>2. Project Sites located in environmental justice communities.</li> <li>3. Applicants who intend to fully decarbonize their Project Site.</li> </ol>

## 4 How to Participate

### 4.1 Participant Steps

In order to participate in the Pilot, Participants must agree to the steps below. MassCEC, at its sole discretion, may consider extending the timelines described below on a case-by-case basis.

#### Phase 1 (Application and Awarding)

1. Applications will be accepted on a rolling basis starting November 1, 2023.
  - a. Early Applicants will have priority in meeting the diversity goals of building typologies.
  - b. Additional information requests may be required to finalize application status.
2. MassCEC and the Consultant will review applications and will notify Applicants via email if they have been selected to participate in the Pilot within six (6) weeks of their application submission.
3. Selected Participants will upload the documents listed below to the Participant Portal.
  - a. Signed Participant Agreement Form
  - b. Signed Utility Release Form
  - c. Electric utility data (usage and cost)
    - i. For two (2) years prior to the Pilot (if available)
  - d. Gas or delivered fuel utility data (usage and cost)
    - i. For two (2) years prior to the Pilot (if available)
  - e. Additional supporting materials such as maintenance logs, scans of drawing, or past energy and condition assessment reports.
4. Selected Participants will work with the Consultant to get oriented and schedule their Decarbonization Assessment.

#### Phase 2 (Planning)

1. The Consultant will conduct the in-person Decarbonization Assessment including:
  - a. Utility bill review and benchmarking to review high level information on building characteristics and utility billing information (based on two (2) years of data).





- b. Once a Participant's utility data is received, the Consultant will work with the Participant to schedule the in-person Decarbonization Assessment. This will take around four (4) to eight (8) hours during which the Participant or a building representative is required to be present. Up to two (2) site visits may be required.
2. Over the three (3) months following the Decarbonization Assessment, Participants and the Consultant will work together to create a detailed Decarbonization Plan to be submitted to MassCEC.
  - a. The Consultant will provide an interim decarbonization strategy review within six (6) weeks.
    - i. This will include a review with the Participant of energy consumption and carbon intensity, outline of potential opportunities and strategies for a detailed investigation, and discussion of goals and outcomes for full building decarbonization and resiliency.
  - b. The Consultant will provide the Participant with a customized Decarbonization Plan.
    - i. This will include an analysis of technical and financial solutions, to inform a recommended pathway with project specific timelines based on input from the Participant on their priorities and budget.
  - c. As needed during Phase 2 (Planning), Participants will coordinate with the Consultant for:
    - i. Follow-up services may be offered via email, phone, or video calls, based on the preferences of the Participant.
    - ii. Potential financing mechanisms, rebate programs, and provide recommendations for incorporating financing approaches.
    - iii. Support in formatting the information for the Decarbonization Plan.

### **Phase 3 (Market Guidance)**

1. The Consultant will reach out to the Participant to complete a follow-up survey to gather feedback on the process, Decarbonization Assessment results, and likelihood of implementing the Decarbonization Plan. This information will be used to inform the development of market resources and tool kits that support building decarbonization across a wide array of market segments and building typologies.
  - a. A written or phone survey will be requested or scheduled to review key questions and insights from Participants.

## **5 Participant Documents**

Relevant documents and forms for Participants are below.

- Application Form
- Program Manual (this document)
  - Exhibit 1: Participant Agreement
  - Exhibit 2: Utility Release Form



## 6 General Conditions

### 6.1 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 public record subject to disclosure. Applicants shall not send MassCEC any confidential or sensitive information in response to this Pilot or Program Manual.

### 6.2 Disclaimer and Waiver Authority

This solicitation 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 Pilot or this Program Manual in part or in their entirety, or change the application guidelines, when it is in MassCEC's best interests.

### 6.3 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 Participant Agreement attached hereto as Exhibit 1, which will set forth the respective roles and responsibilities of the parties.

### 6.4 Changes/Amendments to the Program Manual

The requirements listed herein are subject to change without notice to potential Applicant parties. This Program Manual has been distributed electronically using MassCEC's website. It is the responsibility of Applicant parties to check MassCEC's website for any addenda or modifications to the Program Manual to which they intend to respond. MassCEC, the Commonwealth of Massachusetts, and its subdivisions accept no liability and will provide no accommodation to an Applicant who submits an application based on an out-of-date Program Manual and/or related document.