



Decarbonization Pathways Pilot

Program Manual: Cohort 2

Posted: July 12, 2023

Applications to the Massachusetts Clean Energy Center's ("MassCEC") Decarbonization Pathways Pilot ("Pilot") will be accepted from July 12, 2023 through July 30, 2023.

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



Total Funding Available: \$900,000

The Application Form is available online:

jotform.com/MassCECForms/decarbonizationpathways2



Table of Contents

1	Introduction	3
1.1	Decarbonization Pathways Pilot Overview	3
1.2	Purpose of the Program Manual.....	4
1.3	About MassCEC.....	5
2	Eligibility Requirements	5
2.1	Minimum Project Site Eligibility Requirements	5
2.2	Minimum Project Eligibility Requirements	6
2.3	Eligible Decarbonization Measures.....	8
2.4	Income-Based Incentives	10
3	Project Incentives.....	10
3.1	Award Details.....	10
3.2	Incentive Levels.....	10
3.3	Incentive Payments.....	12
4	How to Apply.....	14
4.1	Application Instructions	14
4.2	Applicants' Questions and Answers.....	14
4.3	Selection Criteria.....	14
5	How to Participate	15
5.1	Participant Steps	15
5.2	Participant Documents	18
6	General Conditions	18
6.1	Notice of Public Disclosure	18
6.2	C-THRU	18
6.3	Disclaimer and Waiver Authority.....	19
6.4	Contract Requirements.....	19
6.5	Changes/Amendments to the Program Manual.....	19



1 Introduction

1.1 Decarbonization Pathways Pilot Overview

The Pilot is a MassCEC pilot that seeks to develop and test a protocol for assessing small residential buildings (“Project Sites”), including single-family homes and multi-family buildings with four (4) units or fewer, in order to understand their current energy use and greenhouse gas emissions (“Decarbonization Assessment”), which will result in customized decarbonization recommendations (“Decarbonization Report”). Through the Pilot, MassCEC is looking to build upon the foundation of a Mass Save® Home Energy Assessment to generate a decarbonization pathway for homeowners to follow as they implement recommendations in a logical order that aligns with their needs and budget, as well as the specific conditions of their Project Site.

MassCEC will offer the homeowners selected for the Pilot (“Participants”) financial incentives to implement the decarbonization measures (“Decarbonization Measures”) defined in Section 2.3. In addition to the initial Decarbonization Assessment, Participants will also receive technical assistance at times of decision making (“Decision Time Support”) from the Pilot’s technical consultant (“Home Decarbonization Advisor”), including support in developing a detailed plan to take action to decarbonize the Project Site during the Pilot (“Decarbonization Plan”). Participants will share feedback on the Pilot and allow performance monitoring of their Project Site. For this Pilot, MassCEC is looking for Participants who will complete at least the following actions (more detail provided in Section 2.2):

1. Complete a package of measures that ensure the home is well-prepared for full decarbonization by being adequately weatherized, having the needed electrical upgrades in place, and addressing any barriers to future decarbonization (collectively “Home Modernization Package,” defined more fully in Section 2.2 below).
2. Plan to make one or more of the following home investments: install a heat pump or upgrade the home’s envelope (collectively referred to as “Major Measures,” defined more fully in Section 2.2 below).

MassCEC has contracted with Abode Energy Management LLC (“Abode”) to be the Home Decarbonization Advisor for the Pilot. Abode will be working directly with Participants during the Decarbonization Assessment, Decarbonization Plan, Decision Time Support, and post-implementation data collection processes. Abode will maintain a website for Participants that will include resources and support, as well as an email address for Participants to submit required documentation. All In Energy, a non-profit focused on advancing an inclusive clean energy economy, will also be providing assistance for the Pilot by recruiting Participants from environmental justice (“EJ”) communities.

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 5.1.



Table 1. Pilot Phases			
Phase Number	Phase Category	Duration	Description
Phase 1	Application and Awarding	1 month	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. MassCEC will send Participants an Award Letter (Exhibit 3). The Home Decarbonization Advisor will reach out to Participants to schedule a Decarbonization Assessment.
Phase 2	Planning	3 months	The Home Decarbonization Advisor will conduct an in-person or virtual Decarbonization Assessment at the Project Site and provide Participants with a Decarbonization Report. Over the following three (3) months, Participants and the Home Decarbonization Advisor will create a detailed Decarbonization Plan for their Project Sites, including receiving quotes for the Home Modernization Package and the selected Major Measure(s). The Home Decarbonization Advisor will provide Decision Time Support as needed.
Phase 3	Implementation	1 year	Participants will implement the recommendations in the Decarbonization Plan, including completing the Home Modernization Package and the selected Major Measure(s). The Home Decarbonization Advisor will continue to provide Decision Time Support as needed.
Phase 4	Post-Implementation	2 years	Participants will share feedback about the Pilot and utility bill data with the Home Decarbonization Advisor and allow them to monitor the energy usage of the Project Site.

1.2 Purpose of the Program Manual

The purpose of this Program Manual is to seek homeowners 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. Applicants do not need to have fully developed strategies to decarbonize their Project Site since the Pilot will offer technical support.

MassCEC launched the first cohort of the Pilot (“Cohort 1”) in Summer 2022. This Program Manual provides information for Applicants interested in participating in the second cohort of the Pilot (“Cohort 2”) in Summer 2023.



This Program Manual describes the eligibility requirements, incentive levels, 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 EJ in all aspects of our work in order to promote the equitable distribution of the health and economic benefits of clean energy and support a diverse and inclusive clean energy industry. MassCEC strives to lead and innovate in equitable clean energy and climate solutions.

2 Eligibility Requirements

2.1 Minimum Project Site Eligibility Requirements

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

- Single-family home
- Multi-family building with four (4) or fewer units*
 - Single owner or multiple owners
 - All units in the building must participate

The Pilot is **not** intended for the following:

- Condos
- Commercial buildings
- New construction or homes built within the last ten (10) years

Project Sites must also meet the following criteria:

- 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 for more information).
- Project Sites must be an occupied residence year-round. For example, summer homes that are unoccupied in the winter are not eligible for the Pilot.

2.2 Minimum Project Eligibility Requirements

All Projects must meet the following minimum requirements:

- Applicant must own the Project Site.
- Applicant must be committed to decarbonizing their Project Site over time.
- During the Pilot, Applicants should plan to, at a minimum:
 1. Complete a package of measures that ensure the Project Site is well-prepared for full decarbonization by being adequately weatherized, implementing necessary electrical upgrades, and addressing any barriers to future decarbonization (collectively “Home Modernization Package”). Specifically, to complete the Home Modernization Package, Participants must:

a. Weatherize:

- Have previously completed all Mass Save® weatherization recommendations or commit to complete all Mass Save® weatherization recommendations during the Pilot.
- Complete any weatherization measures recommended by Home Decarbonization Advisor that are alternatives to Mass Save® recommendations or go beyond the scope of Mass Save® recommendations but are the best solutions to achieve a complete thermal boundary for the home.

Home Modernization Package

- Make a Home Decarbonization Plan
- Weatherize
- Complete Electrical Upgrades
- Ventilate
- Mitigate Barriers

b. Complete Electrical Upgrades:

- Complete any electrical upgrades that will be necessary for full decarbonization that are certain at the time of the Decarbonization Assessment, such as upgrading the Project Site’s electrical service, installing subpanels, or wiring electrical connections for a heat pump water heater, electric range, electric vehicle, etc.
- For any electrical upgrades that may be required for full decarbonization but are uncertain at the time of the Decarbonization Assessment, The Home Decarbonization Advisor will work with Participants to develop a detailed plan with a timeline for electrical upgrades. For example, if it is uncertain whether an electric service



upgrade would be necessary based on the heat pump equipment selected, The Home Decarbonization Advisor will work with the Participant to plan for an electric service upgrade at the time of the next heating system replacement and identify any other contingencies the Participant should plan for in the meantime.

- All Projects with heating or hot water systems nearing the end of their useful life will be required to make the necessary electrical upgrades to avoid a missed opportunity due to an emergency replacement.

c. Ventilate:

- Any Project that triggers the building code is required to comply with the ventilation requirements of the building code.
- At a minimum, ensure that the Project Site has functioning bathroom and kitchen range exhaust fans that exhaust to the outdoors.
- All Projects will be evaluated for the opportunity and need (based on the air tightness of the home) for mechanical ventilation. In cases where mechanical ventilation is necessary, energy or heat recovery ventilation that meet the following criteria will be recommended:
 - HVI certified
 - Sensible Recovery Efficiency (SRE) @32F > 75% at design air flow
 - ECM Motor required

d. Mitigate Barriers:

- Complete any barriers to full decarbonization of the Project Site (as identified by The Home Decarbonization Advisor) such as knob and tube wiring, asbestos/vermiculite, or mold.

2. Plan to make one or more of the following home investments (referred to as “Major Measures”) during the Pilot:

- a. Install cold-climate heat pumps. Applicants who are replacing their heating or cooling system and/or plan to install a whole home heat pump system are preferred.
 - b. Upgrade the Project Site’s envelope by replacing its siding with the plan to pursue some combination of the following weatherization opportunities:
 - Add a weather resistance barrier, add at least one inch of continuous exterior insulation, and replace the windows (triple pane and/or casement, hopper, or awning-style windows are preferred);
 - Add a weather resistance barrier and replace the windows (triple pane and/or casement, hopper, or awning-style windows are preferred); or
 - Add a weather resistance barrier, add at least one inch of continuous exterior insulation, and re-flash and re-seal existing windows.
- Project Sites can be owner or tenant occupied. If applicable, tenants of the Project Site must be aware of the Pilot and willing to cooperate with the Pilot.



- Applicant and, if applicable, tenants of the Project Site, must be willing to cooperate with data gathering.
 - 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).
 - During Phase 4 (Post-Implementation) of the Pilot, Participants will be asked to provide energy bills for two (2) years after Phase 3 (Implementation), including tenant utility data if tenants pay their own utility bills.
 - Participants, and tenants if applicable, must agree to allow energy monitoring to be conducted at the Project Site for up to two (2) years after Phase 3 (Implementation).
 - Participants must be willing to answer interview or survey questions to capture their experience with the Pilot and the Decarbonization Measures they implemented.
 - Participants must provide contact information for tenants (either tenants that are in-place during Phase 3 (Implementation) or tenants that move in during Phase 4 (Post-Implementation)) so they can be reached for an interview or survey to capture their experience with the Decarbonization Measures.
 - Participants must work with any tenants that are in place to coordinate and manage the impacts of the Decarbonization Assessment and the Decarbonization Plan, including allowing blower door testing pre- and post-construction and potentially after major project milestones.
- MassCEC only intends to make one award per Participant. This includes Participants that have already been awarded as a part of Cohort 1.
- All Projects must be performed in compliance with all local, state, and federal laws and codes.

2.3 Eligible Decarbonization Measures

The following measures will be considered eligible decarbonization measures to be reimbursed by the MassCEC incentive described in Section 3 (“Decarbonization Measures”):

- Major Measures
 - Heat pumps for space heating
 - Air-source heat pumps must meet [NEEP’s cold-climate air-source heat pump specification](#) and other heating solutions (e.g., ground-source heat pumps, variable refrigerant flow heat pumps, air-to-water heat pump) should have a similar level high efficiency and cold-climate performance.
 - Expenses related to continuous exterior insulation
 - MassCEC’s incentive can cover the incremental cost of the weather barrier, insulation, any additional furring or trim necessitated by the continuous exterior insulation, and labor costs of these measures (but not the cost of the new siding or labor that would be borne through a standard residing).
 - Triple pane windows
- Weatherization measures
 - Co-pays on any recommended Mass Save® weatherization recommendations



- Any weatherization measures recommended by the Home Decarbonization Advisor that are alternatives to Mass Save® recommendations or go beyond the scope of Mass Save® recommendations but are the best solutions to achieve a complete thermal boundary for the home
- Electrical upgrades, the cost of any electrical upgrades that will be necessary for full decarbonization, such as:
 - Upgrading the home's electrical service
 - Installing subpanels
 - Wiring electrical connections for a heat pump water heater, electric range, electric vehicle, etc.
- Electrification, the cost of converting from a fossil fuel appliance to one of the following electrical solutions:
 - Hot water solution
 - Heat pump water heater, solar hot water, or other non-fossil fuel hot water solution
 - Electric stove/range, including induction stove/ranges
 - Electric dryer with a preference for heat pump dryers
 - Electric vehicle charger
 - Electric outdoor equipment
 - For homes that already have electric appliances, the cost of upgrading to an induction stove/range and a heat pump dryer are also eligible Decarbonization Measures
- Ventilation
 - Bathroom and kitchen range exhaust fans and/or connecting these fans to exhaust outdoors
 - Mechanical ventilation with a preference for energy or heat recovery ventilation that meet the following criteria will be recommended:
 - HVI certified
 - Sensible Recovery Efficiency (SRE) @32F > 75% at design air flow
 - ECM Motor required
- Barrier mitigation, the cost of mitigating any barriers to decarbonization, such as:
 - Knob and tube remediation
 - Mold
 - Asbestos
- Solar photovoltaics
- Batteries/energy storage
- Incremental cost of innovative materials with low embodied carbon

Additionally, eligible Decarbonization Measures include the cost of design professional support and permitting expenses related to planning and implementing the Project, but not related to other aspects of the renovation (e.g., design costs for renovating kitchens).



In case of uncertainty around eligible Decarbonization Measures, Abode will recommend whether or not the expense should be considered eligible, and MassCEC will make the final decision.

2.4 Income-Based Incentives

In the interest of increasing access to Decarbonization Measures to all residents of Massachusetts, MassCEC will offer additional incentives for households with income below eighty percent (80%) and one-hundred twenty percent (120%) of the state median income (“SMI”). Eligibility thresholds are determined based on household size as detailed in Table 2 below. Eligibility is based on total household income (Tax Return Form 1040 line 9), as determined by the Participant and any household members’ federal income tax filings for the most recent year available.

Household Size	<80% of SMI	80% - 120% of SMI	>120% of SMI
1	<\$56,548	\$56,548 - \$84,822	>\$84,822
2	<\$73,948	\$73,948 - \$110,922	>\$110,922
3	<\$91,348	\$91,348 - \$137,022	>\$137,022
4	<\$108,748	\$108,748 - \$163,122	>\$163,122
5	<\$126,147	\$126,147 - \$189,220	>\$189,220
6	<\$143,547	\$143,547 - \$215,320	>\$215,320
7	<\$146,809	\$146,809 - \$220,214	>\$220,214
8	<\$150,072	\$150,072 - \$225,108	>\$225,108
9	<\$153,335	\$153,335 - \$230,002	>\$230,002
10	<\$156,597	\$156,597 - \$234,896	>\$234,896

To receive an enhanced income-based incentive, Participants must follow the process described in Section 5.1 to verify income.

For rental properties, the Participant is the landlord. Each Participant household is only eligible to receive an enhanced income-based incentive for one (1) residence/unit.

3 Project Incentives

3.1 Award Details

MassCEC has \$900,000 available for awards under the Pilot. As described in Section 4.3 of this Pilot, applications will be competitively evaluated. MassCEC will select Participants based on the criteria in Section 4.3. MassCEC anticipates making around forty-five (45) awards as part of the Pilot, with around fifteen (15) of those awards going to Participants in EJ communities.

3.2 Incentive Levels

Incentive levels for Participants are outlined in Table 3 below. Incentive levels are based on the household SMI levels described in Section 2.4. They are subject to change at the sole discretion of MassCEC. Participants should check the Pilot webpage to confirm that they are reviewing the most recent version of the Program Manual.



Participants may use the incentives for any Decarbonization Measures outlined in Section 2.3. All Decarbonization Measures must be reviewed and approved by the Home Decarbonization Advisor as part of the Participant’s Decarbonization Plan.

Table 3. Incentive Structure				
Payment Description	Expected Timeline (from Decarbonization Assessment)	State Median Income Level		
		<80% of SMI	80-120% of SMI	>120% of SMI
Quote Payment: Receiving Quotes for Home Modernization Package and Selected Major Measure(s)	Within 3 months	\$2,000	\$2,000	\$2,000
Project Payment(s): Reimbursement for Decarbonization Measures*	Within 15 months	\$27,000	\$17,000	\$7,000
Final Payment: Completion of Home Modernization Package, Selected Major Measure(s), and Final Project Site Visit	Within 15 months	\$1,000	\$1,000	\$1,000
Maximum Total Pilot Incentive:		Up to \$30,000	Up to \$20,000	Up to \$10,000

*Note: No more than 60% of the total incentive can be used toward a single Decarbonization Measure (e.g., heat pumps)

Participants do not need to receive these payments in order. For example, if a Participant were ready to move forward with a heat pump installation before getting quotes for elements of the Home Modernization Package, they could still apply for a Project Payment (using the process outlined in Section 5.1) to cover the costs of their heat pump installation. However, Participants would need to eventually get those quotes to receive the Quote Payment.

The incentives awarded to Participants through the Pilot may be combined with any other local, state, or federal incentives, and Participants are encouraged to do so where possible. In all cases, the amount of MassCEC’s Project Payment(s) will not, in MassCEC’s sole determination, exceed total Project costs. Total Project costs shall include all costs of all Decarbonization Measures installed during Phase 3 (Implementation), less all other available incentives, including any state or federal rebates, subsidies, and tax incentives, discounted to present value where necessary. If the total Project costs are less than the maximum Project Payment that the Participant is eligible for based on their income, the amount of the Project Payment will be reduced correspondingly. MassCEC will evaluate these situations on a case-



by-case basis and reserves the right to reduce any award projected to exceed total Project costs by an amount sufficient to prevent the excess.

Participants with income below one-hundred twenty percent (120%) of the SMI can still get the Final Payment even if they have not completed the Home Modernization Package or a Major Measure, if the total cost of the Home Modernization Package plus Major Measure exceeds MassCEC's incentive plus all other available incentives and the Participant is not able to take on the additional financial burden. In this case, the Participant will still be required to complete the final visit to get the Final Payment.

Participants with a Project Site that is a multi-family building will be eligible for incentives (in Table 3) per unit. For example, a two-family home owned by a Participant with a household income above 120% of the state median income would be eligible for a maximum incentive of up to \$10,000 per unit (a total of \$20,000 for both units).

3.3 Incentive Payments

Based on their individual preferences and needs, Participants may elect to receive the Quote Payment, the Project Payment, and the Final Payment separately or in one lump sum payment after completion of Phase 3 (Implementation). Furthermore, Participants may elect to break up Project Payment into separate payments based on the contracting and/or completion of individual Decarbonization Measures as detailed in Table 4 below. All requests for incentive payments should be submitted to Abode.

Table 4. Options for Project Payment		
Milestone for Project Payment Request	Required Supporting Documentation	Incentive Amount
Contracting of Decarbonization Measures	<ul style="list-style-type: none"> Signed contract or purchase receipt for Decarbonization Measure Provide all requested information about the contracted Decarbonization Measure to the Home Decarbonization Advisor (e.g., make, model, installer, cost) 	50% of the value of the contracted price of the Decarbonization Measure(s) net of any non-MassCEC incentives, up to half of the total value of Project Payment for which the Participant is eligible.
Completion of Decarbonization Measure(s)	<ul style="list-style-type: none"> Paid invoice or purchase receipt for Decarbonization Measure(s) Photograph of installed Decarbonization Measure(s) Provide all requested information about the completed Decarbonization Measure(s) to the Home Decarbonization Advisor (e.g., make, model, installer, cost) 	<p>If a separate payment request was submitted and approved at the contracting of the Decarbonization Measure(s): The remaining 50% of the value of the contracted price of the Decarbonization Measure(s) net of any non-MassCEC incentives, up to half of the total value of the Project Payment for which the Participant is eligible.</p> <p>If a separate payment request was NOT submitted and approved at the contracting of the Decarbonization Measure(s): 100% of the total incentive for each Decarbonization Measure(s) up to the total value of the Project Payment for which the Participant is eligible.</p>

Participants may elect to request incentive payments at contracting for some Decarbonization Measures and not others. The payment schedule will not affect the incentive total the Participant receives.

Payment of an incentive installment is contingent upon submission of all the required supporting documentation detailed in Table 4 above to Abode, subject to the review and approval of MassCEC.

All incentive payment requests must be submitted during or within one (1) month after completion of Phase 3 (Implementation) at the latest.

Participants may elect to have some or all of their incentive payments paid directly to one or more Decarbonization Measure Vendors (defined in Section 5.1) through a written request (email acceptable) that includes the company name of the Decarbonization Measure Vendor and the exact amount of



incentive payment to be issued to that Decarbonization Measure Vendor. Once this election is made in writing it cannot be revoked.

All non-residential Participants (including tax-exempt and governmental entities) shall provide MassCEC with a properly completed United States Internal Revenue Service Tax Form W-9 (the “W-9”) to receive incentive payments. In addition, all non-residential tax-exempt entities and governmental entities must provide a tax-exemption certification or IRS tax-exemption determination letter. W-9s and tax-exemption information (if applicable) should be emailed only to finance@masscec.com. Grants may be considered taxable income by the United States Internal Revenue Service and the Massachusetts Department of Revenue. All Participants are strongly encouraged to consult with a tax professional to determine the federal and/or state tax implications of receipt of a grant. MassCEC will issue a Form 1099 to each non-residential Participant who receives funds.

4 How to Apply

4.1 Application Instructions

Applications should be completed online at jotform.com/MassCECForms/decarbonizationpathways2. This online application includes questions about the Applicant and Project Site. It can 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](#).

If desired, applicants may submit a scanned version of the completed PDF via email to buildings@masscec.com instead of completing the online form, although MassCEC prefers the completed online form. Applications will be accepted from July 12, 2023 through July 30, 2023.

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

4.2 Applicants’ Questions and Answers

Questions concerning the Pilot can be submitted in writing by email to buildings@masscec.com. All inquiries should reference the “Decarbonization Pathways Pilot.”

MassCEC will post questions and answers from Applicant’s emails in the “FAQ” section of the Pilot webpage (masscec.com/program/decarbonization-pathways-pilot). 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.

4.3 Selection Criteria

Applications will be evaluated using the criteria in Table 5 below.

Table 5. Selection Criteria	
Criteria	Sub-Criteria
Minimum Criteria	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"> • The Application Form is complete and responsive to the Program Manual and application requirements. • The clarity, specificity, and consistency of the application are sufficient to be deemed credible. • The proposed Project Site and Project meets all requirements stated in Section 2.1 and Section 2.2.
Diversity of Applicants	<p>MassCEC is looking to award a diverse group of Projects, including:</p> <ol style="list-style-type: none"> 1. Geographical diversity 2. Income diversity 3. Existing heating fuel type (e.g., oil, natural gas) 4. Existing heating system distribution type (e.g., radiators, ductwork) 5. Home type (i.e., size, floorplan, basement type) 6. Major Measure(s)
Selection Priorities	<p>MassCEC will prioritize the following when evaluating applications:</p> <ol style="list-style-type: none"> 1. Project Sites located in EJ communities and Gateway Cities 2. Applicants who intend to fully decarbonize their Project Site during the Pilot

5 How to Participate

5.1 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. Applicants will fill out the Application Form between July 12, 2023 and July 30, 2023.
2. MassCEC will review applications and phone screen top Applicants by August 2023. (Note: Applicants that receive a phone screen are not guaranteed to be selected to participate in the Pilot.)
3. MassCEC will notify Applicants by September 2023 if they have been selected to participate in the Pilot or not.
4. Selected Participants will submit the documents listed below to Abode:
 - Signed Participant Agreement Form (Exhibit 1)
 - Signed Utility Release Form (Exhibit 2)
 - Electric utility data (usage and cost)
 - For two (2) years prior to the Pilot (if available)
 - If applicable, include tenant utility data if tenants pay their own utility bills
 - Gas or delivered fuel utility data (usage and cost)
 - For two (2) years prior to the Pilot (if available)
 - If applicable, include tenant utility data if tenants pay their own utility bills
5. If applicable, Participants will complete the income verification process as directed by Abode.



- a. Participants eligible for the [Mass Save Low Income Program](#), will be directed to complete income verification through their local [Community Action Agency](#).
 - b. Other income eligible Participants will request a 2022 Tax Return Transcript from the IRS for any members of the household that filed federal income taxes. This transcript can be obtained for free at irs.gov/individuals/get-transcript. When Abode is conducting the Home Decarbonization Assessment they will compare the “Total Income” listed on the Tax Return Transcript(s) of all household members to Table 2 in Section 2.4. Abode and the Participant will sign the Income Verification Form (Exhibit 4).
6. Once these documents are received, MassCEC will send an Award Letter (Exhibit 3) to Participants.
 7. Participants will work with the Home Decarbonization Advisor to get oriented and schedule their Decarbonization Assessment.

Phase 2 (Planning)

1. The Home Decarbonization Advisor will conduct the in-person or virtual (depending on the Participant’s preference) Decarbonization Assessment.
 - This will take around four (4) hours during which the Participant is required to be present.
 - The Home Decarbonization Advisor will provide a Decarbonization Report.
 - This will include an assessment of the Project Site and customized high-level recommendations for decarbonization based on input from the Participant on their priorities and budget.
2. Over the three (3) months following the Decarbonization Assessment, Participants and the Home Decarbonization Advisor will work together to create a detailed Decarbonization Plan to be submitted to MassCEC. This must be submitted within the three (3) months following the Decarbonization Assessment in order for Participants to receive the Quote Payment and continue in the Pilot.
 - Participants will reach out to contractors, installers, and vendors to provide services to advance a decarbonization measure (each a “[Decarbonization Measure Vendor](#)”) for estimates and begin to select Decarbonization Measure Vendors.
 - At a minimum, Participants will receive at least one quote for their selected Major Measure(s) and all recommended measures in the Home Modernization Package.
 - MassCEC recommends receiving multiple quotes for each Decarbonization Measure as a best practice.
 - After receiving at least one quote for the selected Major Measure(s) and all recommended measures in the Home Modernization Package, Participants may submit an incentive payment request for the Quote Payment to Abode.
 - As needed during Phase 2 (Planning), Participants will contact the Home Decarbonization Advisor for Decision Time Support services.



- Decision Time Support may be offered via email, phone, or video calls, based on the preferences of the Participant.
- The Home Decarbonization Advisor can offer Decision Time Support including how to find a Decarbonization Measure Vendor, what to discuss with Decarbonization Measure Vendors, and reviewing estimates.
- The Home Decarbonization Advisor will offer a report comparing heat pump quotes to Participants installing heat pumps.
- The Home Decarbonization Advisor will offer support in formatting the information for the Decarbonization Plan to be submitted to MassCEC within three (3) months of the Decarbonization Assessment.
- **NOTE:** Participants shall be solely responsible for procuring Decarbonization Measure Vendors. MassCEC will not participate in this process, and shall not have any responsibility for managing, overseeing, or otherwise working with the Decarbonization Measure Vendors, and will not provide any representations, warranties, indemnification, or underwriting for the performance of the Decarbonization Measure Vendors. It will be the responsibility of Participants to conduct their own due diligence to vet Decarbonization Measure Vendors prior to entering into contracts with such Decarbonization Measure Vendors.

Phase 3 (Implementation)

1. Phase 3 (Implementation) should be completed within fifteen months of the Decarbonization Assessment (approximately one year after the completion of Phase 2).
2. Participants will sign agreements with Decarbonization Measure Vendors, if not already completed in Phase 2 (Planning). **NOTE:** please see information in Phase 2 above re: responsibilities of Participants regarding procurement of Decarbonization Measure Vendors.
 - If preferred, Participants can request the Project Payment in multiple installments, including an installment at the time of contracting for a Decarbonization Measure, as detailed in Section 5.1.
3. Participants will purchase and install Decarbonization Measures.
 - Participants can request an additional installment of the Project Payment at the completion of any Decarbonization Measure, as detailed in Section 5.1
4. As needed, Participants may continue to contact the Home Decarbonization Advisor for Decision Time Support.
5. Participants will coordinate with the Home Decarbonization Advisor to set up a time for an electrical metering device (such as the Emporia Vue) to be installed on the Project Site.
6. Once all the Decarbonization Measures are installed, Participants should coordinate with the Home Decarbonization Advisor to set up a time for a final Project Site visit, which may include:
 - Collection of feedback about the Pilot experience
 - Education on how to optimize operations of the new Decarbonization Measures



- An inspection of the installation quality of any heat pumps installed during the Pilot (if applicable)
 - A final blower door test (if not conducted previously)
 - Installation of the electrical metering device (such as the Emporia Vue), if not previously installed.
7. Participants will submit incentive payment requests to Abode to receive Pilot incentives if they haven't already. The deadline to submit these forms is one month after the completion of Phase 3 (Implementation).

Phase 4 (Post-Implementation)

1. Participants will provide the Home Decarbonization Advisor automated access to their energy utility bill data or upload energy utility bills to the Participants Portal every six (6) months upon request for two (2) years following Phase 3 (Implementation).
2. Participants will share feedback with the Home Decarbonization Advisor about the Pilot and the Decarbonization Measures they have implemented.
 - This will involve interviews and surveys, which will be no more frequent than every six (6) months for up to two (2) years following Phase 3 (Implementation).
3. Participants will have their electrical usage metered for up to two (2) years following Phase 3 (Implementation).

5.2 Participant Documents

Below are all of the relevant documents and forms for Participants.

- Application Form
- Program Manual (this document)
 - Exhibit 1: Participant Agreement
 - Exhibit 2: Utility Release Form
 - Exhibit 3: Award Letter
 - Exhibit 4: Income Verification 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 C-THRU

Participant agrees and acknowledges that MassCEC shall have the right to disclose the name of any grant recipient and/or payee, the amount of the payment under the Pilot and any other information it



may deem reasonably necessary on C-THRU, the Commonwealth of Massachusetts' online database of state spending, or other applicable state spending website.

6.3 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.

6.4 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.

6.5 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.