



## Request for Proposals: Building Performance Exchange

Date of Issue: May 23, 2024

Proposals Due: July 10, 2024

Total Funding Available:

Phases A-C: \$4,000,000

Pending Success of Prior Phases & Availability of Funds:

Potential Funding for Phase D: \$2,000,000

Total Potential Funding for Phases A-D: \$6,000,000

All proposals must be submitted to:

[buildings@masscec.com](mailto:buildings@masscec.com)

## I. SUMMARY

The Massachusetts Clean Energy Technology Center (“MassCEC”) is seeking proposals from qualified organizations (“Applicants”) that have deep and well-established relationships with the Massachusetts building professional community (such as architects, engineers, sustainability consultants, contractors, and building operators). The selected organization (“Selected Applicant”) will deliver centralized information, case studies, and training to equip the building professional community for decarbonization of larger existing buildings across the Commonwealth. For the purposes of this Request for Proposals (“RFP”), larger existing buildings are defined as those over 20,000 square feet. This effort will be referred to as the Building Performance Exchange (“Exchange”).

The goal of the Exchange is to build collaboration and accelerate market transformation for larger building energy retrofits through knowledge sharing, training, peer to peer interaction, and targeted research. The Exchange, similar to existing building exchanges/hubs in other cities, including the [New York City Building Energy Exchange](#), the [Washington D.C. Building Innovation Hub](#) and the newly established [St. Louis](#) and [Kansas City](#) Building Energy Exchanges, will serve as a centralized resource for many organizations across the state seeking to understand approaches to decarbonizing existing larger buildings. This includes the following large building typologies:

- Multifamily
- Commercial office
- Warehouse, distribution centers, and storage
- Big box retail, mixed use retail, strip malls, and large retailers
- Hotel or dormitory
- Healthcare
- Laboratory
- Schools and higher education
- Public Assembly
- Grocery stores
- Religious worship
- Food service

The Exchange will centralize retrofit content and case studies relevant to statewide audiences. Early engagement will target building professionals working on existing buildings impacted by Boston’s Building Emission Reduction and Disclosure (BERDO)<sup>1</sup> and Cambridge’s Building Energy Use Disclosure Ordinance (BEUDO)<sup>2</sup>. Over time the Exchange will work to engage more

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<sup>1</sup> BERDO: <https://www.boston.gov/departments/environment/building-emissions-reduction-and-disclosure#data-disclosure>,

<sup>2</sup> BEUDO: <https://www.cambridgema.gov/CDD/zoninganddevelopment/sustainabledevelopment/buildingenergydisclosureordinance>

statewide participants and building professionals that have not previously been involved in retrofitting buildings. Other building sizes may be a target for expansion of scope over time.

For equity purposes, the Exchange will ensure availability of content and equal or greater outreach efforts for building professionals serving the affordable housing and public housing community statewide in rehab and retrofit projects, working closely with partners including MassHousing and the Community Climate Bank. The Exchange will also prioritize outreach and engagement to real estate owners with only one or two buildings in communities that have adopted a Building Performance Standard (“BPS”).

The Exchange will regularly coordinate with state policy makers and Mass Save Program Administrators on content and trainings. The Exchange is intended to complement and supplement efforts of a Building Decarbonization Clearinghouse (“Clearinghouse”)<sup>3</sup>, as called for in the [Commonwealth’s Clean Heat Commission recommendations](#), and the Mass Save program offerings and incentives for larger buildings.<sup>4</sup>

The Exchange will foster the ecosystem and peer-to-peer learning required to deliver decarbonized buildings, help scale the industry that serves building decarbonization, and create new job opportunities in emerging technologies, energy efficiency, building operations, and other occupations. This transformation will require training, networking, and peer-to-peer sharing.

The activities funded through this \$4 million grant will be divided into three (3) phases over a four (4)-year implementation period. The fourth phase (Phase D) is subject to the successful implementation of the first three (3) phases (Phases A-C), as determined by MassCEC, and the availability of additional state and federal funding (potentially up to an additional \$2 million), or other revenue sources identified by the Selected Applicant.

- Phase A (Assessment and Program Planning): The Selected Applicant will conduct an initial needs assessment, building off findings from the Clearinghouse study, work done by building hubs and exchanges in other cities, as well as other sources MassCEC and/or the Selected Applicant deems relevant. The needs assessment should identify key stakeholders, priority audience needs, existing building retrofit resources, and educational gaps/opportunities for new content creation. The Selected Applicant will create a program implementation plan based on the early needs assessment and feedback from the internal project team. The Selected Applicant will also develop a

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<sup>3</sup> In the [Clean Energy and Climate Plan for 2050](#), published in December 2022, the Commonwealth sets ambitious climate goals for buildings, with a 93% greenhouse gas emission reduction in 2050 relative to 1990 levels. The plan identifies the development of a building decarbonization clearinghouse to streamline meeting consumer needs as one (1) strategy to meet these climate targets. The state is currently in the process of evaluating the best model for setting up the clearinghouse with support from a consulting contract with VEIC. Investments in “no-regrets” efforts, like the Building Performance Exchange, will test strategies to inform clearinghouse work and address decarbonization needs in the near- and medium term.

<sup>4</sup> <https://www.masssave.com/en/business> and <https://www.masssave.com/en/multi-family>

long-term funding strategy that details how they will financially support the Exchange beyond the initial four-year grant period and how to integrate additional federal funding if secured.

- Phase B (Program Implementation): The Selected Applicant will kickstart the program by executing the program plan, with an initial focus on audiences in Boston and Cambridge and other communities considering BPS and programming for buildings statewide that will be subject to energy reporting requirements. The Selected Applicant will increase the capacity of the organization as needed to deliver on this plan. The Selected Applicant will begin curating educational information, hosting events, and creating other resources for scaling the program.
- Phase C (Program Scaling): The Selected Applicant will scale programming and services to reach statewide audiences including in municipalities beyond Boston and Cambridge that are seeking to implement BPS. The Selected Applicant will reach deeper into the building professional and owner audience for engagement. The Exchange will also expand beyond building professional and owner audiences into new audiences such as contractors, lenders, real estate investors, and insurance agencies.
- Phase D (Program Extension or Expansion): Subject to the successful implementation of Phases A-C, as determined by MassCEC, and the availability of additional funds, MassCEC may fund the Selected Applicant to expand the scope of Exchange programming and services or extend the number of years services are provided for Phases A, B, and C. Continuation of the efforts in the Exchange can take the form of additional funding via MassCEC, federal grant funding, and/or the organization establishing a revenue stream of its own for continued work.

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#### NOTICE OF POTENTIAL ADDITIONAL FUNDING:

MassCEC reserves the right to add additional funding to the Program or extend the Program beyond the initial four (4) years contemplated by this RFP, should Selected Applicant satisfy the milestones established in contracting, as determined by MassCEC, MassCEC secures additional funding (state, federal, or a combination thereof), and the services continue to align with the Decarbonization Clearinghouse. MassCEC estimates this funding may be as much as \$2 million in addition to the base \$4 million contemplated by this RFP. In the event that federal funding is secured, the Selected Applicant would be considered a “Subrecipient” of federal funds, and would be responsible for meeting any relevant federal compliance requirements. Applicants should only apply if they have the capacity now or are able to add capacity in the future to fulfill federal funding reporting requirements in the event that additional federal resources are secured.<sup>5</sup>

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<sup>5</sup> <https://www.energy.gov/scep/technical-assistance-adoption-building-energy-codes>

## II. ABOUT MASSCEC

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

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

## III. PROGRAM CONTEXT AND GOALS

### PROGRAM CONTEXT

Many cities within the Commonwealth are rapidly adopting next-generation climate policies to reduce carbon emissions and make buildings safer, healthier, and more affordable to operate. However, stakeholders for larger buildings (property owners, architects, energy consultants, engineers, construction companies, etc.) do not have an information resource exchange or network of trusted experts to provide training, education, and technical building science solutions for retrofit strategies that can be employed for building decarbonization. Government officials, building professionals, and building owners recognize the need for the Commonwealth to 1) inclusively engage and aid communities in achieving climate policy objectives related to building decarbonization, 2) rapidly scale the market demand for high-performance buildings and retrofits, and 3) provide centralized staffing to connect these audiences with education and guidance material.

In order to facilitate immediate effectiveness and ability to deliver rapid impact, the Exchange will ideally build off established relationships with the Massachusetts building professional community. The Exchange will primarily focus on knowledge related to retrofits of existing buildings. It will provide education for the building professional community seeking to decarbonize through retrofit projects or through long-term building upgrades as investments in

replacements are needed. This Exchange will draw from the experience and informational materials of similar organizations in other leading cities, including the New York City Building Energy Exchange, the Washington D.C. Building Innovation Hub and the newly established St. Louis and Kansas City Building Exchanges. While developed in partnership with local and state governments in municipalities that have BPS, these Exchanges operate as independent organizations, intended to be a neutral party while also being responsive to changes in BPS and Utility and State Incentives and Policy.

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## PROGRAM GOALS

The goals of the Program are to:

- Deliver customizable best-practice and educational resources to stakeholders working to decarbonize larger existing buildings or comply with BPS.
- Create suites of events, resources, and programs that equitably engage architectural, engineering, and contractor audiences, with a special outreach to the affordable housing sector and building owners with small real estate holdings, as well as newer audiences such as financiers, investors, and workforce training organizations.
- Improve understanding in the building professional community of the diversity of approaches successfully being employed to decarbonize large buildings through retrofits.
- Increase observed building energy performance improvements and increase application of retrofit techniques and best practices among relevant architectural, sustainability, and engineering communities.
- Network with and learn from similar organizations.
- Adapt relevant roadmaps, strategies, and materials from other Exchanges to the Massachusetts market.
- Centralize access to embodied carbon information, tools, and lessons.
- Serve as a forum for MassCEC and other local, state, and federal agencies to share tools and resources for large building retrofit content, such as BETA: building specific decarbonization case studies and templates, BETA: Roadmap building strategies, etc.
- Connect audiences to existing technical and financial resources, such as Mass Save, in coordination with the ongoing development of the Building Decarbonization Clearinghouse.
- Create centralized information about buildings that have utilized MassCEC support for decarbonization roadmaps, MassCEC building-specific decarbonization planning resources, DOER Low and Moderate Income Technical Assistance, or MassSave decarbonization planning so that qualified contractors can be connected to potential retrofit work.

## IV. ELIGIBILITY

For the sake of this RFP, the term “Applicant” may refer to either a single entity or several entities applying together. Teams with multiple entities should have one entity that takes responsibility for organizing the team and proposal (“Lead Applicant”). MassCEC will contract with the Lead Applicant. Applicants may be companies or non-profits with multiple employees. Applicants can partner with other organizations (“Project Partners”) to provide complementary expertise that a single entity may not possess.

## V. ESTIMATED TIMELINE

Release of RFP	May 23, 2024
Webinar	June 5, 2024, 1 pm
Questions due to MassCEC via email to <a href="mailto:buildings@masscec.com">buildings@masscec.com</a>	June 12, 2024
Questions with Answers Posted to MassCEC Website	June 17, 2024
Proposals Due	July 10, 2024, by 5 pm
Interviews of Top Applicants	Late July, 2024
Notification of Award	Mid August, 2024

Timeline is subject to change at MassCEC’s discretion.

## VI. SCOPE OF WORK

### Phase A: Assessment and Program Planning

#### TASK 1: PROGRAM MANAGEMENT AND REPORTING

The Selected Applicant will be responsible for administration, documentation, communication, and evaluation related to the Exchange and the tasks in this agreement. This includes but is not limited to:

- Tracking key performance metrics including, but not limited to:
  - Number of new program participants by target audience.
  - Number of total participants.
  - Number of virtual and in-person events offered.
  - Number of views and downloads of online resources like guides and toolkits.

- Percentage of participants from priority equity audiences (professionals serving the affordable housing sector, building owners with small real estate holdings, and minority and women-owned businesses).
- Evaluating program impact by:
  - Periodically administering follow-up surveys to event attendees to determine knowledge gained and actions taken based on information learned from resources and training.
- Attending weekly check-ins with MassCEC, or another agreed upon frequency based on the needs of MassCEC and the Selected Applicant, and quarterly check-ins with MassCEC, EEA and DOER, including maintaining notes from meetings.
- Providing quarterly written updates (in brief memo or slide format) that will include, at a minimum:
  - Completed follow-up surveys with a summary of the results.
  - Qualitative lessons learned on engaging target audiences, content offerings, and emerging understanding of gaps in knowledge.
  - Planned or implemented modifications to the Program.
  - Proposed modified budget for next year based on experience in the quarter.
- Compiling an Annual Program summary within one (1) month of the end of each year that synthesizes the quarterly reports and provides a monthly and total value for each of the metrics listed above, as well as a synopsis of lessons learned and any Program modifications. Memo format or slides is acceptable or addition of retrofit section of organization's current annual report.
- Measure progress, analyze feedback, revise Implementation plan and budget annually to continually evaluate efforts to reach intended audiences, build credibility and achieve the goals identified in the early assessment and Implementation Plan. Example evaluation and strategy work may include:
  - Analyzing quarterly or annual data on audience growth and engagement (digital and in person, quantitative and qualitative) to improve effectiveness and reach.
- Coordination with the Building Decarbonization Clearinghouse development, as appropriate

The Applicant is encouraged to add additional metrics (and/or modify the ones above) for tracking relevant program outputs and outcomes based on the Applicant's proposal.

**Deliverable(s):**

- Kickoff Meeting with MassCEC, DOER, and EEA.
- Weekly check-in meetings with MassCEC, or another agreed upon frequency based on the needs of MassCEC and the Selected Applicant.
- Quarterly check-ins with MassCEC, EEA and DOER.
- Quarterly written update and program metrics updates.
- Meeting minutes from weekly MassCEC check-ins and quarterly check-ins with MassCEC, EEA and DOER.
- Annual Program Summary, including proposed annual budget modifications.
- Final Program Report at the end of four (4) year period.



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## TASK 2: NEEDS ASSESSMENT

The Selected Applicant will complete an initial needs assessment to determine stakeholder needs and what value an Exchange may offer. The assessment should consider the needs of stakeholders most motivated to access the Exchange, such as those subject to BPS in Boston and Cambridge, as well as stakeholders who will be engaged during the statewide expansion of marketing and content in Phase C. The assessment should target the local policy landscape, state of the market, major stakeholders, partner organization capabilities, building stock characterization, and local goals. The Selected Applicant should plan to collaborate with VEIC to understand what work has already been done in the statewide Clearinghouse assessment and with Mass Save Program Administrators to align with existing efforts and applicable incentive programs. Depending on the information available from the Clearinghouse assessment, the Exchange assessment may include, but not be limited to:

- Analysis of local/regional needs related to large building decarbonization support, especially as they relate to local BPS.
- Identification and documentation of educational retrofit content currently available in Massachusetts.
- Identification of educational gaps in current resources.
- Identification of audiences not being reached and methods to engage, including the possibility of providing resources in languages other than English.
- Identification of resources that should be adapted to the Massachusetts market.
- Identification of most common challenges faced by existing Exchanges in other communities and recommended solutions.

### **Deliverable(s):**

- Notes from at least one (1) meeting with VEIC.
- Notes from at least one (1) meeting with Mass Save Program Administrators.
- Early Assessment.

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## TASK 3: PROGRAM IMPLEMENTATION PLAN

Using the needs assessment, the Selected Applicant will create a program implementation plan to guide the creation of the Exchange. At a minimum, the implementation plan must include:

- Outreach strategy for engaging key stakeholders.
- Hiring, sub-contracting, or personnel scale-up strategy (as needed).
- Four (4) year budget with one (1) year breakouts. Selected Applicant will have the opportunity to modify the budget annually based on program progress and early experience.

- Descriptions of resources to be included on the Exchange, including whether they are adapted or new, expected format (e.g., online guide, in person or virtual workshop, recording, etc.), and target audience.
- Program implementation timeline.
- Program measurement and evaluation plan.
- Plans for how to partner with MassSave to raise awareness of and increase engagement with relevant Program Administrator incentives and offerings.
- Strategy to scale the program from an initial focus on Boston and Cambridge in Phase B, to a statewide audience in Phase C.
- Long-term funding strategy to continue the Exchange beyond the four (4) year grant period, in the event that no additional funding is secured.

**Deliverable(s):**

- Program implementation plan.

## Phase B

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### TASK 4: PROGRAM IMPLEMENTATION

The Selected Applicant will expand their organizational capacity to support the proposed initiatives and deliver new and adapted educational content to priority audiences, with an initial focus on communities subject to BPS.

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#### TASK 4.1: INCREASE ORGANIZATIONAL CAPACITY

The Selected Applicant should increase organizational capacity based on the needs identified in the early assessment and the hiring or personnel scale-up strategy identified in the program plan. Those working on the Exchange should be able to provide expertise on the following topics:

- Retrofitting of large-scale commercial buildings.
- Zero-over-time planning.
- Embodied Carbon Analysis and Reduction.
- Local BPS.
- Benchmarking/building energy reporting.
- Recent building code updates related to existing building retrofits.
- Electrification retrofits.
- Or other related expertise as identified in the hiring, sub-contracting, or personnel scale-up strategy.

**Deliverable(s):**

- Implementation of the hiring or personnel scale-up program plan, as needed.

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#### TASK 4.2: CREATE AND DELIVER EDUCATIONAL CONTENT

Based on the needs assessment the Selected Applicant will adapt existing resources from other Exchanges and create new educational content and opportunities specific to Massachusetts. The Selected Applicant will provide content and opportunities in formats appropriate to the target audiences.

- Adapt existing resources to a Massachusetts market. Resources may include stakeholder specific guidance documents, such as:
  - Affordable housing retrofit guidance, such as the [Decarbonization Roadmap for Affordable Multifamily Housing](#), [Climate Ready Buildings](#), or [LISC Affordable Housing Decarbonization Hub](#).
  - Office building guidance, such as [Turning Data into Action](#).
  - Commercial and nonprofit building guidance such as lessons learned from [MassCEC's BETA: Nonprofit Buildings Pilot](#) and [BETA: Commercial Buildings Decarbonization Plans](#).
  - Case studies such as [RMI REALIZE Demonstrations](#).
- Create new content and resources based on gaps identified in early needs assessment and case studies that explicitly include information on incentives and financing with a specific focus on compliance with BERDO and BEUDO goals.
- Deliver educational content. Educational content and opportunities may be provided in the following formats:
  - Technical courses, workshops, trainings, and panel discussions.
  - Networking and thought-leadership forums.
  - e-Learning programs and platform.
  - Exhibits of local high-performance or net zero buildings and/or technologies that demonstrate significant gains in energy efficiency and electrification.
  - Website customization based on building stakeholder needs and priorities.
  - Technology explainers, such as wastewater heat recovery, heat recovery ventilation, and commercial heat pump options.

**Deliverables:**

- List of new and adapted educational content and learning opportunities, including format and targeted audience.

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**TASK 4.3: DISSEMINATE STATE, LOCAL, AND MASS SAVE INCENTIVE AND POLICY INFORMATION RELATED TO BUILDING DECARBONIZATION**

The Exchange will serve as a hub for information and events related to local BPS, Statewide Energy Reporting and Benchmarking, Clean Heat Standard, and other evolving decarbonization policies in Massachusetts and the federal government. The Selected Applicant will keep up to date with evolving policy developments, while also ensuring that regulatory stakeholders are well-informed about the benefits of using the Exchange to disseminate information from a central location. The Selected Applicant will also ensure that target audiences are kept informed of the latest regulatory developments and incentive offerings, empowering them to align their practices with evolving industry standards. Strategies may include:

- Disseminating policy and incentive information from Mass Save and government entities. Municipalities, state, and federal actors will be encouraged to use the Exchange and its network of building professionals to disseminate information on policy and incentives relevant to large building stakeholders. The Exchange will assist municipalities, the state, and the federal government synthesize content across organizations to create stakeholder and building type specific focus. For example, a training offered through the Exchange might highlight for a K-12 School building professional and owner audience:
  - Evolving Mass Save Incentives for existing buildings relevant to school rehabilitation and retrofit.
  - How the Massachusetts Clean Heat Standard, Alternative Portfolio Standard, SMART policy for solar, Green Schools funding, and Massachusetts Clean Peak Standard impact school retrofit projects, and federal incentives could benefit school retrofits.
  - Case studies of schools retrofitting and electrifying in Massachusetts and the Northeast.
  - Specific examples of Cambridge and Boston schools that are retrofitting to meet local building performance standard requirements with a variety of approaches.
- Directing owners to listings of building professionals with large building retrofit technical expertise and completed projects:
  - Create listings of projects and professional firms with relevant technical expertise.
- Directing building owners and professionals to financing options. Examples include:
  - Traditional lenders.
  - Massachusetts Community Climate Bank.
  - Commercial PACE (Property Assessed Clean Energy).
  - Mass Save supported lenders.

**Deliverables:**

- List of events and content with policy and incentive focus.
- Description and location of listing of building professionals with retrofit expertise retrofit and completed projects.
- List of events and content related to financing options.

## Phase C

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### TASK 5: PROGRAM SCALING

The Selected Applicant will use the early experience and resources to scale programming and services for a statewide audience to ensure geographic diversity. The Exchange will expand beyond early adopters in the building professional and owner audience to reach building professionals and owners that have not traditionally been engaged. Scaling will include developing new content consistent with buildings in less urban settings and engaging new

audiences beyond the building professional and owner audience, such as banks and insurance agencies. The Selected Applicant may employ the following strategies to bring the program to scale:

- Hire additional staff as needed, to accommodate increased services, expanded content offerings and expanded geographic focus.
- Conduct outreach and marketing to new audiences such as:
  - Those in less urban settings.
  - Banks, lenders, and insurance agencies.
- Create a process or platform to connect buildings that have received state or MassSave support for decarbonization roadmaps or building specific decarbonization plan support with qualified contractors who have participated in Exchange events and community.
- Create new content and resources specific to the needs of new audiences.
- Leverage data from legislatively required Building Energy Reporting to inform outreach and engagement priorities.

**Deliverables:**

- Record of outreach conducted to new audiences.
- Listing and or links to new educational content and learning opportunities.
- List of priority audiences and building types for scaling.

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**TASK 6: ADDITIONAL TASKS WITHIN INITIAL GRANT PERIOD**

As budget allows, Applicants may propose additional scopes for the Exchange that they believe would enhance the Program. Detailed tasks and payment structure will be negotiated during contracting with Selected Applicant.

Phase D

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**TASK 7: PROGRAM EXTENSION OR EXPANSION**

Subject to the successful implementation of Phases A-C, as determined by MassCEC, the availability of additional funds, and the services continue to align with the Decarbonization Clearinghouse, MassCEC may fund the Selected Applicant to expand Exchange programming and services or extend the number of years services are provided, with additional funding of up to \$2 million. MassCEC anticipates that this Phase would entail similar tasks to Phases A-C (i.e., program management & reporting, continued content development and delivery, targeted outreach, and other miscellaneous tasks), subject to the outcomes and lessons learned during Phases A-C.

**VII. HOW TO APPLY**

MassCEC must receive responses to this RFP no later than Wednesday, July 10<sup>th</sup> 2024 at 5:00pm ET. Applicants must apply to all phases, with availability for a potential Phase D. Only complete, timely proposals will be considered. MassCEC, at its sole discretion, may determine whether an application is complete. The submission must be in electronic form, submitted via email to [buildings@masscec.com](mailto:buildings@masscec.com). Proposals should be in a single PDF document. “Building Performance Exchange” must appear in the email subject line.

Please include in your proposal:

- **Attachment A:** Authorized Applicant’s Signature and Acceptance Form.
- **Attachment B:** Application Form.
  - Proposed approach to tasks described in Section 6 (Scope of Work).
- **Attachment C:** Proposed Budget by Task and by Milestones.
  - Budget for each task. While the contract will be structured as regular base grant payments with some milestone payments based on certain deliverables, an approximate range of staffing or contracting costs should be included.
  - Provide budget ideas for how money should be spent if additional funding is secured. For example, would you add to the investment each year in the first four (4) years, would you expand number of years supported, etc.
- Resumes of key participating individuals, including from project partners.
- Up to three (3) relevant work samples or links to work samples.

Please review and be prepared to sign Attachment D (Sample Agreement). Any requested change to Attachment D (Sample Agreement) should be noted in Attachment B (Application Form).

## VIII. SELECTION CRITERIA

Applicant proposals will be evaluated on the following criteria:

### **Experience and Qualifications: (35%)**

- To what extent does the Applicant demonstrate the eligibility criteria outlined in Section IV?
- Does the Applicant have close relationships with the Massachusetts design, engineering, sustainability, and construction communities working on projects subject to BPS?
- Does the Applicant have experience creating educational content related to large building retrofits, affordable housing, and reducing embodied carbon?
- Does the Applicant have experience developing audience-specific curriculum; delivering both in person and virtual training; creating customizable best-practice and educational resources; and developing exhibitions and technology demonstrations?
- Does the Applicant have subject matter expertise in large building retrofits, including but not limited to:
  - Retrofitting of large-scale commercial buildings.

- Zero-over-time planning.
- Embodied Carbon Analysis.
- Local BPS.
- Recent building code updates related to existing building retrofits.
- Electrification retrofits.
- Does the Applicant demonstrate experience successfully delivering equitable and inclusive programs to diverse audiences, including managing budgets and timelines, bringing pilot programs to scale, timely hiring of new staff, tracking metrics and evaluating program outcomes, and writing reports?
- Does the Applicant have the experience and qualifications to develop an approach that will focus special attention on companies in the design, engineering, and construction industry working on affordable housing retrofit?
- Does the Applicant have the potential to assume long-term ownership of the Exchange and establish the Exchange as a semi-permanent resource in Massachusetts?
- Does the Applicant have experience incorporating the concepts of diversity, equity, and inclusion into program design and successfully working with diverse audiences, such as minority and women owned business enterprises, design teams and building professionals serving affordable and public housing clients, and non-profits and other organizations serving low- and moderate-income residents and Environmental Justice neighborhoods.
- Does the Applicant have experience hiring a diverse workforce and/or does the Applicant have a defined strategy for diverse hiring and contracting?
- Does the Lead Applicant or other member of the Applicant Team have Supplier Diversity Office (SDO) certification as a diverse business enterprise or non-profit or do they meet the criteria for any of the diverse business enterprises certified with the SDO but have not completed certification with the SDO?

**Applicant Team (if applicable):**

- Does partnership have a history of collaboration?
- Does partnership have a clear structure for collaboration?

**Completeness of Proposed Approach (25%):**

- To what extent does the Applicant's proposed approach align with the tasks requested by MassCEC in Section VI?
- Does the Applicant propose strong ideas and methods for educating the building professional community on large building retrofit content and ideas?
- Does the Applicant have a strategy for an awareness campaign that will lead to high visibility in the design, engineering, and contractor community in Massachusetts and engage firms and individuals not generally engaged in high performance content offerings?

- Does the Applicant propose a method of revising annual budgets and implementation plan that will be responsive to MassCEC, EEA, and DOER guidance?
- Does the Applicant propose additional initiatives or approaches that would improve the impact of this effort? Does the Applicant provide additional insights that would improve the proposed scope?
- Has the Applicant proposed a compelling approach to longer-term Exchange operation, including through establishing long-term funding and/or utilizing future state funding streams?

**Cost Competitiveness and Soundness of Budget (15%):**

- *Cost Comparison:* How does the Applicant’s proposed costs and cost by category of tasks compare to the budget and other applicants?
- *Outcomes vs. grant amount:* How does the scale and quality of the proposed scope compare to other applicants? How much work is proposed with the available budget?
- *Budget Comprehensiveness:* How well does the Applicant lay out budget categories in clear fashion and does it correspond well with narrative in proposed approach?
- *Quality of Proposal for Milestones, Payments, and Revision on Annual Basis:* Is the Applicant’s proposal for upfront payment, base grant payments to support continuing work and milestone payments for work above the continuing work comprehensive and well thought out?

**Overall Quality of Proposal (25%):**

- *Understanding of Program Concepts:* Does the Applicant demonstrate an understanding of the concepts and motivators underlying the Program?
- *Leveraging Knowledge Opportunities:* Does the Applicant identify opportunities to leverage knowledge they or partners have to scale the results, within Massachusetts?
- Does the Applicant have relationships with other Building Exchanges to leverage lessons learned and strategies employed and materials developed?

**XI. BUDGET**

MassCEC anticipates contracting with the Selected Applicant for the Tasks described in Section VI for Phases A, B and C for no more than Four Million Dollars (\$4,000,000) initially even though in later years additional funding may be secured. The proposed budget in the application should reflect the proposed approach described in Attachment B (Application for Lead Applicant) and Attachment C (Proposed Budget Categories and Milestones and Payments).

MassCEC anticipates that the Selected Applicant will be paid by the completion of the tasks described in Section VI (and any others mutually agreed upon) on a milestone basis, not to exceed an agreed upon maximum. Invoices for Selected Applicant will be paid no more frequently than on a monthly basis and no less frequently than quarterly. MassCEC can advance payments at contract execution and plan to deliver quarterly payments to support operations so that staff can be hired quickly to increase organizational capacity. Details of payment of



milestones and dates will be negotiated in contracting and adjusted by MassCEC based on input from EEA and DOER.

As described above, subject to the Selected Applicant's successful implementation of Phases A-C (as determined by MassCEC) and MassCEC securing additional funding, this budget may be expanded (and the Agreement between MassCEC and the Selected Applicant amended) to account for additional funding.

## X. CONTACT INFORMATION FOR QUESTIONS

[buildings@masscec.com](mailto:buildings@masscec.com)

## XI. GENERAL REQUEST FOR PROPOSALS CONDITIONS

### NOTICE OF PUBLIC DISCLOSURE

As a public entity, MassCEC is subject to Massachusetts' Public Records Law, codified at Chapter 66 of the Massachusetts General Laws. Thus, any documentary material, data, or other information received by MassCEC from an Applicant is a public record subject to disclosure. Applicants shall not send MassCEC any confidential or sensitive information in response to this RFP. If confidential information is submitted as part of the application and not clearly marked as confidential, such information may be made publicly available by MassCEC without further notice to the Applicant.

### DISCLAIMER & WAIVER AUTHORITY

This RFP does not commit MassCEC to award any funds, pay any costs incurred in preparing an application, or procure or contract for services or supplies. MassCEC reserves the right to accept or reject any or all applications received, waive minor irregularities in submittal requirements, modify the anticipated timeline, request modification of the application, negotiate with all qualified Applicants, cancel or modify the RFP in part or in its entirety, or change the application guidelines, when it is in MassCEC's best interests.

This RFP has been distributed electronically using MassCEC's website. It is the responsibility of Applicants to check the website for any addenda or modifications to an RFP to which they intend to respond. MassCEC accepts no liability and will provide no accommodation to Applicants who submit an application based on an out-of-date RFP document.

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## CONTRACT REQUIREMENTS

Upon MassCEC's authorization to proceed with the proposal, MassCEC and the awarded Applicant(s) will execute a contract, substantially in the form of the template agreement attached hereto as Attachment D, which will set forth the respective roles and responsibilities of the parties.