ATTACHMENT B: STATEMENT OF QUALIFICations Application Form

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| **Contact Information** | | | |
| **Lead Applicant Organization Name** | Click or tap here to enter text. | | |
| **Contact Name and Position** | Click or tap here to enter text. | | |
| **Street Address** | Click or tap here to enter text. | | |
| **City or Town** | Click or tap here to enter text. | | |
| **State** | Click or tap here to enter text. | **Zip Code** | Click or tap here to enter text. |
| **Contact Email** | Click or tap here to enter text. | | |
| **Contact Phone** | Click or tap here to enter text. | | |

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| **Organization Description**  *Complete this section once for every organization that is part of the Applicant team.* ***If there are multiple organizations that are part of the Applicant team, please copy this table for each organization that is part of the Applicant team****.* | |
| **Organization Name** | Click or tap here to enter text. |
| **Are you a pre-qualified Mass Save vendor?** | Yes  No |
| **If you are a pre-qualified Mass Save vendor, which Tasks are you pre-qualified for?** | Comprehensive Building Assessment  Portfolio Decarbonization Roadmap  Focused Study |
| **Organization Description**  *Describe your organization’s history and mission.*  *(200 words maximum)* | Click or tap here to enter text. |
| **Supplier Diversity Office Certifications**  *Optional*  *(Please check all the apply)* | Does your company have any of the following certifications from Massachusetts’ [Supplier Diversity Office](https://www.mass.gov/certification-program-for-sdo):  Minority Business Enterprise  Women Business Enterprise  Service-Disable Veteran Business Enterprise  Veteran Business Enterprise  Lesbian, Gay, Bisexual, and Transgender Business Enterprise  Disability-Owned Business Enterprise |
| **Non-certified Diverse Business Enterprises** *Optional* | *Identify if you believe that your organization meets the criteria for any of the business enterprises above but has not completed certification with the Supplier Diversity Office:*  *Click or tap here to enter text.* |
| **Diversity, Equity, and Inclusion Mission or Vision Statement**  *Optional* | *Please include a brief summary of your organization’s diversity, equity, and inclusion mission or vision statement or a link to such a statement on your organization’s website. Please describe what your organization is proactively doing to promote diversity, equity, and inclusion and what steps you plan to take in the future.*  Click or tap here to enter text. |

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| **Review of Attachment C: Sample Agreement** | |
| **Has the Applicant reviewed Attachment C: Sample Agreement? (Required)** | Yes |
| **Are there any changes to this template contract agreement that would be necessary before the Applicant could sign the contract?** (Note: MassCEC has limited ability to change our contract terms.) | No  Yes. If so, please elaborate below and/or provide an annotated version of Attachment C with your statement of qualifications.  Click or tap here to enter text. |

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| **Statement of Qualifications**  *Describe how the Applicant or Applicant team demonstrates all of the areas of required experience described in Section 6 (Required Experience & Threshold Selection Criteria). Please reference relevant past projects that Applicant team organizations (or individuals from those organizations) have worked on. Where applicable reference relevant certifications and credentials. Please call attention to your firm’s leadership in professional organizations, commissions or similar organizations that inform local or state level energy policy. Please also describe any long-term and on-going relationships with schools or school districts.*  *Suggested word limits are to encourage concision. Applicant may write more if they feel it is necessary to address the prompt. Please do not feel obligated to approach the suggested word limit.* | |
| **Energy Assessment and Mass Save Program Experience (for Applicants applying to work on Mass Save-eligible projects only)** *(suggested 150-word limit)* | *Click or tap here to enter text.* |
| **Site Assessment**  (suggested 300-word limit) | *Click or tap here to enter text.* |
| **Technical Knowledge**  *(suggested 300-word limit)* | *Click or tap here to enter text.* |
| **Technical Services**  *(suggested 300-word limit)* | *Click or tap here to enter text.* |
| **Health and Safety**  *(suggested 150-word limit)* | *Click or tap here to enter text.* |
| **Market Knowledge**  *(suggested 300-word limit)* | *Click or tap here to enter text.* |
| **Diversity, Equity, and Inclusion**  *(suggested 150-word limit)* | *Click or tap here to enter text.* |
| **Cost Estimation**  *(suggested 150-word limit)* | *Click or tap here to enter text.* |
| **Analytical Capability**  *(suggested 150-word limit)* | *Click or tap here to enter text.* |
| **Facilitation and Project Management**  *(suggested 150-word limit)* | *Click or tap here to enter text.* |
| **Customer Engagement and Communication**  (suggested 150-word limit) | *Click or tap here to enter text.* |

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| **Proposed Approach & Relevant Experience**  *The sections below are an opportunity to describe the Applicant’s proposed approach to each of the Tasks described in the RFQ.* ***IF YOU ARE A PRE-QUALIFIED MASS SAVE VENDOR, please only fill out the following: ‘Approach to Green School Works Renewable Scope’, ‘Capacity of Organization’, ‘Additional Proposed Scope’, and ‘Additional Information about Proposed Approach’.*** *Any additions to the scope should be described separately as additional Tasks.*  *For each task, describe your firm’s experience, capacity, and capabilities in providing the services requested herein (including resumes of team members as a separate attachment). Be sure to list any experience as it relates to each specific task. Provide examples of previously accomplished work and approximate timeline from start to finish when able. Three relevant examples preferred for each task you are bidding to provide. MassCEC is particularly interested in examples of how your work resulted in project implementation and overcame barriers for these often-challenging decarbonization measures.*  *Suggested word limits are to encourage concision. Applicants may write more if they feel it is necessary to address the prompt. Please do not feel obligated to approach the suggested word limit.* | |
| **Applicant Attestations – Select all that apply:**  **Tasks**  This statement of qualifications is for Task 1 (Comprehensive Building Assessment).  This statement of qualifications is for Task 2 (Portfolio Decarbonization Roadmap).  This statement of qualifications is for Task 3 (Focused Study).  **Type of Participant:**  Applicant is interested in serving Mass Save-eligible Participants.  Applicant is interested in serving non-Mass Save-eligible Participants. | |
| **Approach to Task 1: Comprehensive Building Assessment**  *(suggested 300-word limit)* | *Click or tap here to enter text.* |
| **Approach to Task 2: Decarbonization Roadmap**  *(suggested 300-word limit)* | *Click or tap here to enter text.* |
| **Approach to Task 3:**  **Focused Study**  *(suggested 300-word limit)* | *Click or tap here to enter text.* |
| **Approach to Green School Works Renewable Scope**  *(suggested 300-word limit)* | ***On-site renewable energy feasibility analysis:***  *Click or tap here to enter text.*  ***MA Class I Renewable Energy Certificate (“REC”) analysis:***  *Click or tap here to enter text.* |
| **Capacity of Organization**  *Applicants must identify how many studies they can conduct concurrently****.***  *(suggested 300-word limit)* | *Click or tap here to enter text.* |
| **Additional Proposed Scope**  *Optional: If desired, please describe an added task or expanded scope which you believe would enhance the value of this initiative.*  *(suggested 300-word limit)* | *Click or tap here to enter text.* |
| **Additional Information about Proposed Approach**  *Please share anything else the Applicant team would like MassCEC to know about your proposed approach. Applicants may attach additional content if desired.*  *(suggested 300-word limit)* | *Click or tap here to enter text.* |

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| **Project Team Rates**  *Please provide your proposed hourly (or unit rates if specified) in the table provided for the technical and engineering services you are interested in performing. You may choose to provide the same or different pricing for each level (Principal, Sr Engineer, Jr. Engineer, etc.) for each of the services listed. MassCEC reserves the right to set guidelines and caps.* | | | |
| **Organization** | **Name** | **Position** | **Hourly Rate** |
| *Click or tap here to enter text.* | *Click or tap here to enter text.* | *Click or tap here to enter text.* | *Click or tap here to enter text.* |
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| **Budget and Schedule**  *Fill out an estimated completion timeline and budget for each Task. The budget should reflect the proposed approach described above. Add additional lines for additional proposed Tasks as necessary.*  *All costs stated above shall be ALL INCLUSIVE, i.e., expenses, copies, mileage, data storage, etc. shall be included in the quoted prices.*  *Note: As outlined in Section 9 (How to Participate) MassCEC expects to finalize the scope and budget for each project after reviewing a project-specific proposal, but MassCEC will not approve budgets outside of these ranges unless additional scope has been added and approved.* | | | | |
| **Task Description** | **Estimated Completion Timeline from Contract Signing** | | **Per Unit Cost (may be a range)** | **Notes** |
| Comprehensive Building Assessment | *Click or tap here to enter text.* | | *Click or tap here to enter text.* | *Click or tap here to enter text.* |
| Decarbonization Roadmap | *Click or tap here to enter text.* | | *Click or tap here to enter text.* | *Click or tap here to enter text.* |
| Focused Study | *Click or tap here to enter text.* | | *Click or tap here to enter text.* | *Click or tap here to enter text.* |
| Green School Works Renewable Scope (per school) | *Click or tap here to enter text.* | | *Click or tap here to enter text.* | *Click or tap here to enter text.* |
| If applicable, additional proposed task | *Click or tap here to enter text.* | | *Click or tap here to enter text.* | *Click or tap here to enter text.* |
| (Add additional lines as necessary for any additional tasks) | *Click or tap here to enter text.* | | *Click or tap here to enter text.* | *Click or tap here to enter text.* |
| **Schedule Narrative**  *Please provide any details about the anticipated schedule beyond the estimated completion timeline for each Task listed in the table above that the Applicant would like MassCEC to be aware of (suggested 200-word limit)* | | *Click or tap here to enter text.* | | |
| **Budget Narrative**  *Please provide any details about the budget beyond the budget for each Task listed in the table above that the Applicant would like MassCEC to be aware of.*  *(suggested 200-word limit)* | | *Click or tap here to enter text.* | | |

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| **References** | |
| *Include three references for the Applicant’s previous work. The references must include the name of the organization, contact person, a full address, email, and phone number, as well as a one sentence description of the Applicant’s work for the reference.* ***If there are multiple organizations that are part of the Applicant team, please copy this table for each organization that is part of the Applicant team****.* | |
| **Organization Name** | *Click or tap here to enter text.* |
| **Reference 1:** | Organization: Click or tap here to enter text.  Contact Name: Click or tap here to enter text.  Contact Title: Click or tap here to enter text.  Contact Email: Click or tap here to enter text.  Contact Phone Number: Click or tap here to enter text.  Description of the Applicant’s work for the Reference: Click or tap here to enter text. |
| **Reference 2:** | Organization: Click or tap here to enter text.  Contact Name: Click or tap here to enter text.  Contact Title: Click or tap here to enter text.  Contact Email: Click or tap here to enter text.  Contact Phone Number: Click or tap here to enter text.  Description of the Applicant’s work for the Reference: Click or tap here to enter text. |
| **Reference 3:** | Organization: Click or tap here to enter text.  Contact Name: Click or tap here to enter text.  Contact Title: Click or tap here to enter text.  Contact Email: Click or tap here to enter text.  Contact Phone Number: Click or tap here to enter text.  Description of the Applicant’s work for the Reference: Click or tap here to enter text. |

Please include the following attachments:

* Team Member Resumes: Include resumes of each individual who would be part of the project team.
* Report Samples (if available): Include up to three (3) report samples that demonstrate the Applicant team’s ability to provide the type of technical assistance described in this RFQ. MassCEC understands that not all final deliverables can be publicly shared, and so report samples are optional based on availability.
* An example of a completed renewable energy feasibility analysis.