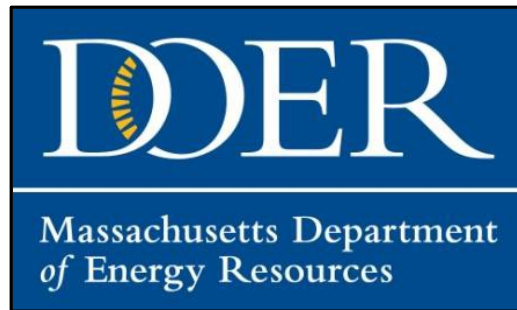


THE COMMONWEALTH OF MASSACHUSETTS
**EXECUTIVE OFFICE OF ENERGY AND
ENVIRONMENTAL AFFAIRS**
DEPARTMENT OF ENERGY RESOURCES
PATRICK C. WOODCOCK, COMMISSIONER

**100 Cambridge Street, Suite 1020
Boston, MA 02114**



Program Opportunity Notice (PON)

Document Title: Municipal Energy Technical Assistance Grant Program

COMMBUYS Bid Number: BD-20-1041-ENE01-ENE01-52762

Agency Document Number: PON-ENE-2020-018

Issued June 24, 2020

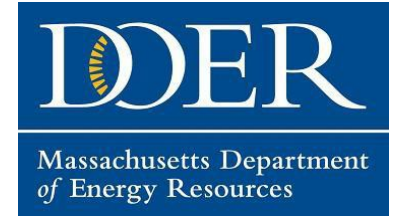
Please Note: This is a single document associated with a complete Bid (also referred to as Solicitation) that can be found on www.COMMBUYS.com. All Bidders are responsible for reviewing and adhering to all information, forms and requirements for the entire Bid, which are all incorporated into the Bid. Bidders may also contact the COMMBUYS Helpdesk at COMMBUYS@state.ma.us or the COMMBUYS Helpline at 1-888-MA-STATE. The Helpline is staffed from 8:00 AM to 5:00 PM Monday through Friday Eastern Standard or Daylight time, as applicable, except on federal, state and Suffolk county holidays.



Municipal Energy Technical Assistance Grants

June 2020

PON-ENE-2020-018



GRANT APPLICATION

BACKGROUND

Municipal Energy Technical Assistance Grants (Grants) are Grants that provide funding to independent third parties to aid municipalities, regional school districts, and water/wastewater districts in the study, negotiation, development and/or management of clean energy projects. The Grants are offered on an annual basis, provided that funding is made available. The amount of available funding, for future Grant rounds may vary. The cumulative total of actual awards depends upon the number of applications received, their eligibility and the funding allocation available for this Grant program.

An applicant may receive a Grant of up to twelve thousand five hundred dollars (\$12,500) for Municipal Energy Technical Assistance, except for the zero-energy and zero-ready assessments, and microgrid evaluations, where the maximum allowable Grant amount is five thousand dollars (\$5,000). Zero-energy and zero-ready integrated design services are eligible for the maximum Grant in the amount of twelve thousand five hundred dollars (\$12,500).

AWARD

Funding will be provided by the Department of Energy Resources (DOER). The budget for this Grant program is two hundred and fifty thousand dollars (\$250,000). The budget may be increased or decreased at the sole discretion of the DOER

ELIGIBILITY

The DOER Green Communities Division is making available, Municipal Energy Technical Assistance (META) Grants to **ALL** 351 Massachusetts municipalities, regardless of Green Community designation status, **IN ADDITION** all regional school districts and water/wastewater districts are eligible to apply for grants under this Program Opportunity Notice.

- Previous Green Communities Division Technical Assistance Grant¹ recipients must have **completed all aspects of their previous grants, including all reporting, in order to apply for this current opportunity. Preference will be given to applicants that have not received META awards previously.**
- All Grant-funded projects must be completed by September 30, 2022. Funds not expended by then will be forfeited
- All applicants may apply for META Grants that meet the eligibility requirements specified in the application for the project types listed in Section A.

APPLICATIONS & AWARDS

Applications may be submitted commencing at 9 AM August 20, 2020 and closing at 4 PM August 20, 2020. Any applications received prior to or after the above dates and times will be rejected

- Applications must contain, at a minimum, the information requested in the application. The DOER will communicate to an applicant if an application is incomplete and provide the applicant the option of providing additional information. If the applicant chooses not to provide additional information the DOER will reject the application as incomplete.
- **Applications will be reviewed, and awards made based on the order in which complete applications are received until all available funds are disbursed. Applicants will be notified that their application was received. *NOTE:*** In order to be deemed complete, an application **MUST** contain the required signature in Attachment B (Certification of Application), the attachments containing all the required information requested under Eligibility Requirements below as applicable, and all information requested in Attachment A (Project Summary).

ASKING QUESTIONS

This Program Opportunity Notice (PON) is being conducted under 815 CMR 2.00, and has been distributed electronically using COMMBUYS, the Commonwealth's official procurement record system (<http://www.commbuys.com>). The project name is the Municipal Energy Technical Assistance Grant Program (META) and the project number is PON-ENE-2020-018. Correspondence to the DOER should include this project number as well as the title. All notifications and amendments to this PON will be posted on COMMBUYS. It is the responsibility of every potential respondent to check COMMBUYS for any addenda or modifications to a PON to which they intend to respond. The Commonwealth of Massachusetts and its subdivisions accept no liability and will provide no accommodations to respondents who fail to check for amended PONs or submit inadequate or incorrect responses.

Respondents may not alter PON language or any PON component files. Those submitting a proposal must respond in accordance to the PON directions and complete only those sections that prompt a respondent for a response. Modifications to the body of this PON, specifications, terms and conditions, or which change the intent of this PON are prohibited. Any unauthorized alterations will disqualify a response.

¹ This includes both Owner's Agent Technical Assistance (OATA) grants last offered in 2014 and META grants offered 2015-2019

All proposals and information submitted in response to this PON are subject to the Commonwealth of Massachusetts Public Records Law, M.G.L., Chapter 66, Section 10, and to Chapter 4, Section 7 and Subsection 26. Any statements in submitted responses that are inconsistent with these statutes shall be disregarded.

- This application is available as PON-ENE-2020-018 on COMMBUYS (as a “Bid.”)
- All questions must be submitted by 5 PM on August 12, 2020 to COMMBUYS
- All answers shall be posted by 5PM on August 14, 2020 to COMMBUYS
- To find an item on COMMBUYS: log into [COMMBUYS](#), locate the Bid, acknowledge receipt of the Bid, and scroll down to the bottom of the Bid Header page. The “Bid Q&A” button allows Bidders access to the Bid Q&A page.
- To submit an application, see the Instructions on page 13

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APPLICANT INFORMATION

Municipality/Regional School District/Water or Wastewater District/	Street Address
City/Town	Zip code
CEO Name	CEO Title
Grant Point of Contact	Title
Telephone	Email

A) MUNICIPAL ENERGY TECHNICAL ASSISTANCE PROJECT TYPE

Please check the appropriate box

- Municipal solar PV systems no less than 15 kW in size on property owned by a municipality
- Net metering agreements for projects no less than 15 kW in size on property not owned by the applicant
- Community shared solar (CSS)
- An assessment to explore a community shared solar system on private or public property
 - Development of a community shared solar system on private or public property
- Owner's agent services for energy savings performance contract
- Evaluation of potential microgrid systems
- Investigation clean energy resiliency opportunities at critical municipal facilities
- Evaluation of storage opportunities for public facilities with high demand charges and/or paired with municipally owned solar PV
- Audit of Oil, Propane or Electric Heated Building² (Must meet ASHRAE Level 2 or equivalent standard)
- NOTE: Audits found not meeting ASHRAE Level 2 will not be reimbursed**

² See circular figure at the bottom of this webpage: <http://www.ashrae.org/resources--publications/bookstore/procedures-for-commercial-building-energy-audits> to better understand ASHRAE Energy Audit Levels.

- New high-performance building assistance
 - An assessment for the municipality to consider a zero-energy ready, zero-energy and/or passive (PHI or PHIUS) building for the construction of a new municipal building
 - Zero-energy ready, zero-energy or passive (PHI or PHIUS) building integrated design services
- Energy efficiency technical assessments of processes at public water supply and wastewater treatment facilities
- Technical assistance for developing engineering drawings and/or bid specifications to develop clean energy procurement documents
- Heating system conversion engineering study and/or bid specifications
 - Conversion of heating system type – boiler or furnace along with controls and distribution system – to a more efficient type (e.g. steam to hot water, or combined heat and power)
 - Conversion to clean burning efficient biomass or wood pellet or chips fueled heating system
 - Conversion to high-efficiency heat pump system (air, water or ground sourced)
 - Addition of a solar water collector to supplement domestic hot water and/or space heating (either stand-alone or in combination with one of the above heating systems)
 - Conversion to water or wastewater source heat pumps
- A qualifying study to determine efficacy and scope of building retro-commissioning, for municipal facilities over 20,000 square feet, which should include:
 - Utility data review
 - Building management system performance review
 - Specification development for retro-commissioning project
- Technical assessment and recommendations for transitioning a fleet of at least fifty (50) vehicles to electric and/or hybrid vehicles, including, but not limited to:
 - Collecting and reviewing existing vehicle data to determine drive-cycles and system duty-cycles (use of telematics is recommended)
 - Recommended vehicle replacement strategy, including vehicle costs, and estimated energy and fuel savings
 - Necessary charging equipment required for the recommended strategy. Studies should also note any facilities upgrades needed to support the recommended vehicles and charging equipment
 - Other implementation issues and barriers for transitioning to electric and hybrid electric vehicles, including maintenance and service impacts

NOTE: Applicants are highly encouraged to use META grants to procure consulting/engineering services of vendors on statewide contract PRF62. [Click here to access vendor list and user guide.](#)

ELIGIBILITY REQUIREMENTS

All applications must meet the following requirements to be eligible for META. All required documentation must be provided to confirm eligibility for all projects listed under Section A.

- For municipal solar PV projects, a site assessment must be provided. Please **attach a feasibility study or site assessment for the site.** A study or assessment must, at a minimum, include the following:
 - Roof-mounted systems
 - o Evidence that the roof has a twenty (20)-year life span
 - o Visuals that demonstrate limited HVAC equipment on the roof and no trees that could cause shading
 - o Visuals that demonstrate the roof is either flat or south facing.
 - o **NOTE:** META services may be used to confirm a roof is structurally sound to support the additional load of a solar PV system
 - Ground-mounted systems (including canopies)
 - o Visuals that demonstrate there is no shading (buildings, structures, trees). Noting that trees will be removed is not acceptable and such proposals will be ineligible for META.
 - o Confirmation that proposed site meets the characteristics of a Category 1 land use in the most recent guidelines of the Solar Massachusetts Renewable Target (SMART) program. [Visit the SMART website](#) for more information.
 - o Visuals that demonstrate there are utility lines nearby. Please mark utility lines clearly on your documents
 - o Visuals that demonstrate the site is either flat, or if sloping, that the system will face south

- For net metering agreements on property not owned by the applicant, please attach:
 - o Price quotes and scope from the proposed consultant
 - o Whether targeted sites are known at this time. If so, please also attach:
 - o Feasibility study or site assessment for targeted sites
 - o All documentation required above for Municipal Solar PV projects, except that visuals demonstrating that utility lines are nearby are not required

- For community shared solar (CSS) assessment projects, please attach:
 - o Letters of expression of interest from at least five utility customers in the community
 - o A letter from a solar industry representative familiar with CSS documenting a conversation it has had with the community

- For community shared solar (CSS) development projects on private or public property, please attach:
 - o Site assessment. (Google Earth maps or <http://pvwatts.nrel.gov/> can provide assessment information.)
 - o Outline of the business/ownership model
 - o Assessment of community interest.
 - o Letters of commitment from at least five CSS participants

- A feasibility study or site assessment for the identified site. The study or assessment must, at a minimum, include the information required for a Municipal Solar PV system noted above
 - See [Community Shared Solar: Review and Recommendations for Massachusetts Models](#)
 - See [Community Shared Solar: Implementation Guidelines for Massachusetts Communities](#)
- For owner’s agent services for energy savings performance contracts, a solicitation for an Energy Services Company (ESCO) must have been issued for each affected municipality and/or public entity, and solicitations must be filed with the DOER per M.G.L. ch.25A.
- For each affected municipality or public entity, please specify the date the procurement was issued for selection of the ESCO vendor
 - For each affected municipality or public entity, please specify the date of acknowledgement of receipt from DOER of the “Notice of EMS Procurement” per M.G.L ch. 25A
- For evaluation of potential microgrid systems, please attach:
- Price quotes and scope from the proposed consultant
 - Whether or not targeted sites are known at this time. If so, please describe
- For investigation of clean energy resiliency opportunities at critical municipal facilities, please attach:
- Approximate number of people served by the facility on a daily basis
 - Approximate number of people served by the facility during an emergency
 - Existing distributed generation and/or backup infrastructure (type and capacity)
- For investigation of storage opportunities at public facilities, please attach:
- Annual energy consumption of facility
 - A copy of a recent bill showing demand charges
 - Interval data for the proposed facility (if exists)
 - If paired with existing municipally owned solar PV, identify system location and size
 - If paired with new solar PV, all documentation required above for Municipal Solar PV projects
- For an audit of oil, propane or electric heated building (must meet ASHRAE Level 2 or equivalent standard), please attach:
- Draft scope of work to be used in soliciting potential vendors³
- For energy efficiency technical assessments of processes at public water supply and wastewater treatment facilities
- Energy efficiency technical assessments **MUST** conduct an in-depth study for one or more major treatment processes or pieces of equipment. Studies may not focus on typical building energy efficiency measures, such as lighting and heating

META grant funds can be used for up to fifty percent (50%) of assessment for facilities served by utility efficiency programs. Applicants must commit to working with their existing utility efficiency programs if funded with a META grant

³ See this document https://www.pnnl.gov/main/publications/external/technical_reports/PNNL-20956.pdf to better understand ASHRAE Energy Audit Levels and for model specifications

- For technical assistance for developing engineering drawings and/or bid specifications to develop procurement documents for energy efficiency measure(s), please attach:
 - An audit that identifies measure(s) to be implemented, including estimated energy and cost savings

- For heating system conversion engineering study and/or bid specifications, the building must have at least one of the following:
 - An audit that confirms the building is properly weatherized and insulated, i.e., measures to address the building envelope were not recommended in the audit due to the building being well-sealed. **Please attach a copy of this building audit**
 - Documentation that the building has been properly weatherized and insulated within the last five years; this can include invoices for air sealing and insulation. **Please attach a copy of this documentation**
 - An audit stating that the building cannot be further insulated without major renovation. For example, brick or masonry buildings cannot add wall insulation without major renovations to add insulation on the interior wall of every room. Attic spaces in these buildings, however, often can be insulated without major renovation and documentation must be shown that these spaces have been weatherized and insulated. **Please attach a copy of this audit**

NOTE: For conversion to water or wastewater source heat pumps, proof of a prior audit or weatherization is not required, but weatherization must be included in the scope of the study as a separate measure, as well as the impact of its implementation on the sizing and design of the water/wastewater source heat pumps.

New High-Performance Building Assistance

- For a zero-energy ready, zero-energy and/or passive (PHI or PHIUS) building feasibility study, please attach:
 - Documentation that the governing body (e.g. board of selectman, town council, mayor, school committee), has authorized appropriated funds for a feasibility study for a new building.
 - A copy of certified meeting minutes for this authorization
 - List of team members including a description of each individual's experience working on passive (PHI or PHUS) and zero-energy projects.
 - Documentation of the energy use intensity (EUI) expected before incorporating renewables in order to reach design goals (zero-energy ready, zero-energy or passive (PHI or PHIUS))

- For a zero-energy ready, zero-energy or passive (PHI or PHIUS) building integrated d services, please attach:
 - Documentation that the governing body (e.g. board of selectman, town council, mayor, school committee), has authorized appropriated funds for design, engineering and/or construction of a new building
 - List of team members including a description of each individual's experience working on passive (PHI or PHUS) and zero-energy projects
 - Documentation of energy modeling completed assessing design goals (zero-energy ready, zero-energy and/or passive (PHI or PHIUS.))
 - Documentation of the Energy Use Intensity (EUI) expected before incorporating renewables in

- order to reach design goals (zero-energy ready, zero-energy or passive (PHI or PHIUS.))
- Evidence of engagement with MassSave Program Administrators New Construction personnel

For a qualifying study to determine efficacy and scope of building retro-commissioning, please attach:

- A brief building description
- Square footage (must be a minimum of 20,000 square feet)
- A general HVAC description (central plant as well as distribution systems for both heating and cooling)
- Controls system description, including brand, age, date of last software update
- A list of major equipment, including number and age of each type
- A brief renovation, retrofit, and equipment replacement history
- Energy Use Intensity of building (kBtu/sf). Priority given to buildings with EUIs between fifty (50) and one hundred and twenty (120)
- Commitment to implement cost-effective retro-commissioning measures identified

For a technical assessment and recommendation for transitioning a vehicle fleet to electric and/or hybrid vehicles, please include:

- Current fleet size (small, medium, and heavy-duty vehicles)
- Total fuel usage for previous fiscal year (gasoline, diesel, and, if applicable alternative fuels)
- Draft scope of work, which should address items listed on page 6

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ATTACHMENT A – PROJECT SUMMARY

PLEASE ATTACH A DETAILED SUMMARY OF THE PROJECT, LIMITING YOUR RESPONSE TO NO MORE THAN 3 PAGES.

The following must be included for the application to be deemed complete. You must address each bullet:

- Estimated annual clean energy benefits (e.g. kWh saved, MMBtu saved, clean energy kWh generated). If META is being provided to identify the clean energy benefits (audits, for example), those benefits must be reported to the DOER following completion of META services, if awarded
- Steps completed in the project to date (e.g. town approvals)
- Confirmation that the technical assistance project will be completed by September 30, 2022
- Why a third-party municipal energy consultant is critical for your entity to implement this project
- A discussion of the specific tasks you expect the third-party municipal energy consultant to perform once services are awarded
- Please note in the summary the amount of grant requested:
 - Twelve thousand five hundred dollars (\$12,500) including for integrated design services for zero-energy or zero-ready new construction
 - Five thousand dollars (\$5,000) for a zero-energy or zero-energy-ready building assessment,
 - Five thousand dollars (\$5,000) for evaluation of potential microgrid systems

ATTACHMENT B – CERTIFICATION OF APPLICATION

CERTIFICATION OF APPLICATION

The Certification of Application below must be provided as a *scanned pdf with signature*.
For joint applications, one certification must be submitted for each municipality.

CERTIFICATION OF APPLICATION

The **Chief Executive Officer** must complete this certification.

I, _____ am authorized to execute said Application on behalf of -
_____, the applying municipality, regional school district,
or water/wastewater district.

I verify that the information in the Municipal Energy Technical Assistance Grant Application is true.

[Signature of Chief Executive Officer]

[Title of Chief Executive Officer]

[Date]

NOTE: THE CHIEF EXECUTIVE OFFICER IS DEFINED AS THE MANAGER IN ANY CITY HAVING A MANAGER AND IN ANY TOWN HAVING A CITY FORM OF GOVERNMENT, THE MAYOR IN ANY OTHER CITY, AND THE BOARD OF SELECTMEN IN ANY OTHER TOWN UNLESS SOME OTHER OFFICER OR BODY IS DESIGNATED TO PERFORM THE FUNCTIONS OF A CHIEF EXECUTIVE OFFICER UNDER THE PROVISIONS OF A LOCAL CHARTER OR LAWS HAVING THE FORCE OF A CHARTER.

FOR REGIONAL SCHOOL DISTRICTS, THE CHIEF EXECUTIVE OFFICER IS THE SUPERINTENDENT.

FOR WATER/WASTEWATER DISTRICTS, THE CHIEF EXECUTIVE OFFICER IS THE SUPERINTENDENT.

INSTRUCTIONS — If you have any problems or questions about the application process, please contact Paul Carey, paul.s.carey@state.ma.us

- **No paper submission** is required or accepted for the grant application. The process is electronic only.

Application Materials Checklist – ARE YOUR MATERIALS READY?

- ✓ Begin each of your electronic files with your municipal/entity name followed by wording that makes the content of the file clear – this is **REQUIRED**
- ✓ META Grant Application (Word or PDF file)
- ✓ Summary of Project (Attachment A) (Word or PDF file)
- ✓ Signed Certification of Application (Attachment B) (PDF file)
- ✓ Supporting Audits, Studies, MOUs, other documentation.

Please only submit once. If you made a mistake, or forgot something, please contact Paul Carey at paul.s.carey@state.ma.us / 617-626-7372.

META Grant Application Process

1. Email the required documents to Paul.S.Carey@state.ma.us
2. You will receive an email indicating receipt of the documents. Determination of the grant award will not occur at this time.

Get Help

Pre-Grant Application Process - [Contact your Regional Coordinator](#)

Application Process and Technical Issues - Contact Paul.S.Carey@state.ma.us / 617-626-7372