The Commonwealth of Massachusetts

Executive Office of Energy and Environmental affairs

Department of Energy Resources

Judith F. Judson, Commissioner

100 Cambridge Street, 10th Floor

Boston, MA 02114



Program Opportunity Notice (PON)

Document Title: Municipal Energy Technical Assistance Grant Program

COMMBUYS Bid#: BD-17-1041-ENE01-ENE01-16272

Agency Document Number: PON-ENE-2017-031

Issued May 12, 2017

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](http://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**

***May 2017***

***PON-ENE-2017-031***





**GRANT APPLICATION**

**BACKGROUND**

* Municipal Energy Technical Assistance Grants (Grants) are those Grants that provide funding to independent third parties to aid municipalities, regional school districts, municipal lighting plants, or water/wastewater districts in the study, negotiation, development and/or management of clean energy projects.
* These Grants are offered on an annual basis, provided that funding is made available. Up to $500,000 is available for awards. 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 $12,500 for Municipal Energy Technical Assistance (META), except for the zero net energy and zero net-ready assessments, and microgrid evaluations, where the maximum allowable Grant amount is $5,000. Zero net energy and zero net-ready integrated design services are eligible for the maximum Grant in the amount of $12,500.
* Municipal energy coordination has a maximum Grant amount of $13,750 per town ($12,500 plus 10% administrative fee) to procure and manage any project listed in Section A on behalf of a municipal entity; $7,500 to provide assistance in becoming a Green Community and a maximum Grant amount of $5,000 to provide assistance to existing Green Communities.
* An initial disbursement will be conditioned on the Department of Energy Resources (DOER) receiving a signed contract between the Grantee and its selected third party technical assistance consultant. Remaining disbursements will be based on the receipt of vendor invoices provided to the Grantee detailing vendor services, tasks completed and charged.
* All Grant-funded projects should be complete by May 30, 2019. Funds not expended by then will be forfeited.
* The DOER will contract directly with regional planning authorities and other technical assistance agencies for municipal energy coordination.

**ELIGIBILITY**

* The DOER’s Green Communities Division is making available, Grants for META to **ALL** 351 Massachusetts municipalities, regardless of Green Community designation status, **PLUS** all regional school districts, technical assistance agencies[[1]](#footnote-1), water/wastewater districts and municipal lighting plants.
* Previous Green Communities Division Technical Assistance Grant[[2]](#footnote-2)recipients (excluding regional planning authorities and other technical assistance agencies) must have **completed all aspects of their previous grants, including all reporting, in order to apply for this current META opportunity.**
* All applicants may apply for META Grants that meet the eligibility requirements specified in the application for the projects types listed in Section A.
* Regional planning authorities/technical assistance agencies can ONLY apply for the project types listed in Section B.

**APPLICATIONS & AWARDS**

**Applications may be submitted commencing at 9 AM June 14, 2017 and closing at 5 PM June 28, 2017. 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; then 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 of one of the following:**
	+ An application is complete and all required information has been provided.
	+ An application is not complete and additional information is required.
	+ All funding for this grant opportunity has been awarded and the application is therefore not eligible for review.
* ***NOTE:*** In order to be deemed complete, an application **MUST** contain the required signature in Attachment B (Certification of Application), the attachments *with* the required information requested under Eligibility Requirements below as applicable and all information requested in Attachment A (Project Summary).

**ASKING QUESTIONS**

* This application is available as PON-ENE-2017-031 on COMMBUYS (as a “Bid.”)
* All questions must be submitted by 5 PM on June 5, 2017 to COMMBUYS.
* To find an item on COMMBUYS: log into [COMMBUYS](https://www.commbuys.com/bso/), 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 15.

**APPLICANT INFORMATION**

|  |  |
| --- | --- |
| Municipality/Regional School District/Water or Wastewater District/Regional Planning Agency/Municipal Lighting Plant (in MA)/Regional Planning Authority/other Technical Assistance Agency | Street Address  |
| City/Town | Zip code |
| CEO Name | CEO Title |
| Grant Point of Contact  | Title |
| Telephone  | Email |

1. **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

 Energy Savings Performance Contract

 Evaluation of potential microgrid systems

In Investigate 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 Building[[3]](#footnote-3) (Must meet ASHRAE[[4]](#footnote-4) Level 2 or equivalent standard)

New High Performance Building Assistance

An assessment of potential energy efficiency and/or renewable energy measures for new building construction design

An assessment for the municipality to consider a Zero Net Energy Building (ZNEB) for the construction of a new municipal building. Typically this would include the hiring of a facilitator to work with the building committee and conduct a charrette with some technical experts

Adding a study for a ZNEB to be included in an already planned feasibility study for a new municipal building

Integrated design services to ensure ZNEB measures remain a primary consideration throughout the planning, design, engineering and construction phases of new construction

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

***NOTE:*** The DOER has a separate solicitation for funding the design and installation of wastewater energy recovery systems outside of a wastewater treatment facility. Information on this solicitation can be found [here](http://www.mass.gov/eea/docs/doer/procurement/pon-wwer022014no-forum.pdf).

Consultant support to apply International Performance Measurement & Verification Protocol (IPMVP) to Green Community energy usage data for communities with the following circumstances:

* Newly functioning ventilation: and or Significant changes in operating hours

***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.](http://www.mass.gov/anf/docs/osd/uguide/prf62designateddoer.pdf)

1. **MUNICIPAL CLEAN ENERGY COORDINATION ACTIVITIES**

Technical Assistance Agencies may apply to perform the following activities:

* + - Prepare to become a Green Community: (Max $7,500 per town for this group of activities up to 100 hours)
			* Criterion #1 – Review existing by-laws and assist in developing new by-law if needed
			* Criterion #3 – For Baseline creation: Set up, review and enter data into MassEnergyInsight
			* Criterion #3 – For 5 year Energy Reduction Plan: help arrange audits, prepare plan
			* Criterion #4 – Drafting of Fuel Efficient Vehicle Policy and/or Vehicle Inventory
			* Consolidate documents in preparation for submitting designation application
		- For Existing Green Communities: (max $5,000 per town for this group of activities)
			* Assist with grant application preparation
			* Assist with procurement activities for approved grant funded projects
			* Assist with Annual Report preparation
		- For any municipal entity: (Max $12,500 per town plus up to 10% administration fee)
			* Procurement and management of any clean energy project on behalf of a municipal entity listed above in **Section A**

**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
	+ Evidence that the roof has a 20-year life span,
	+ Visuals that demonstrate limited HVAC equipment on the roof and no trees that could cause shading,
	+ Visuals that demonstrate the roof is either flat or south facing.
	+ ***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
	+ 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. (Please note that the DOER’s [Ground Mounted Solar PV Guide](http://www.mass.gov/eea/docs/doer/renewables/solar/solar-pv-guide.pdf) discourages installation of ground-mounted solar in “locations that require significant tree cutting, because of the important water management, cooling and climate benefits trees have.”)
	+ Visuals that demonstrate there are utility lines nearby. Please mark utility lines clearly on your documents.
	+ 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:

* Price quotes and scope from the proposed consultant
* Whether targeted sites are known at this time. If so, please also attach:
	+ Feasibility study or site assessment for targeted sites
	+ 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:

* + Letters of expression of interest from at least five utility customers in the community
* 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:

* Site assessment. (Google earth maps or <http://maps.nrel.gov/imby> are resources for site assessment information.)
* Outline of the business/ownership model
* Assessment of community interest.
* 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*](http://www.mass.gov/eea/docs/doer/renewables/solar/community-shared-solar-model-frameworks-032813.pdf)
* *See* [*Community Shared Solar: Implementation Guidelines for Massachusetts Communities*](http://www.mass.gov/eea/docs/doer/renewables/solar/community-shared-solar-implementation-guidelines-with-contracts-032913.pdf)

*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[[5]](#footnote-5) (*must meet ASHRAE[[6]](#footnote-6) Level 2 or equivalent standard), please attach:

* A copy of a MassSave audit completed within the last three years, or proof that an audit is scheduled within the next six months of this grant application, or
* Proof those efficiency improvements have been completed within the last five years. Please describe the project in Attachment A and attach all related invoices.

***NOTE:*** These requirements are not necessary for applicants served by municipal light plants.

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 50% of assessment for facilities served by utility efficiency programs. Applicants must commit toworking with their existing utility efficiency programs if funded with an META grant.

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.

For *Consultant support to apply International Performance Measurement & Verification Protocol (IPMVP) to Green Community energy usage data for communities*

* Applicants must be a Green Community with significant changes in building operating hours and/or significant renovations that resulted in greater energy use intensity. **Please include in Project Summary (Attachment A): identifying which building(s) the IPMVP is sought, and what alterations have been made since the community’s baseline year.**

**New High Performance Building Assistance**

For *Assessment of Potential Energy Efficiency and/or Renewable Energy Measures for New Building Construction Design,* please attach:

* Documentation that the appropriate governing body (e.g. board of selectman, town council, mayor, school committee), has formed a building committee to consider a new building.
* A copy of certified meeting minutes for this governing body.

For a *Zero Net Energy or Zero Net-Ready Building Assessment*, please attach:

* Documentation that the appropriate governing body (e.g. board of selectman, town council, mayor, school committee), has formed a building committee to consider a new building.
* A copy of certified meeting minutes for this governing body.

For a *Zero Net Energy or Zero Net-Ready 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.

For a *Zero Net Energy or Zero Net-Ready Building Integrated Design 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.
* A copy of certified meeting minutes for this authorization.

**Municipal Clean Energy Coordination**

***NOTE:*** Under this solicitation, municipalities may receive services to help them achieve Green Communities designation; PLUS services available to existing Green Communities (once they become designated).

Technical Assistance Agencies applying for Municipal Clean Energy Coordination under Section B, please attach:

* + A Memorandum of Understanding signed by the CEO of the municipality and by the entity providing services for each municipality to receive support services. (See Attachment B for definition of Chief Executive Officer (CEO))
	+ The Memorandum of Understanding must include: 1) the services to be provided and estimated costs (see earlier list of “municipal energy coordination activities”); 2) why support from a technical assistance agency is necessary.

**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 in order 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 Technical Assistance project will be completed by May 30, 2019;
* 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; and,
* Please note in the summary the amount of grant requested:
	+ $12,500, including for integrated design services for zero net energy or zero net-ready new construction;
	+ $5,000 for a zero net energy or zero net-ready building assessment,
	+ $5,000 for evaluation of potential microgrid systems

*Technical Assistance Agencies only:*

* + $5,000 per municipality for services provided to existing Green Communities
	+ $7,500 per municipality for services provided to becoming a Green Community
	+ $13,750 per municipal entity to procure and manage any clean energy project entity listed above in Section A (up to $12,500 for clean energy assistance plus $1,500 administrative fee. For procurement and management assistance projects less than $12,500, administrative fees will be capped at 10%, based on actual costs).

# ATTACHMENT B

**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, technical assistance agency, regional school district, municipal light plant 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.

# For technical assistance agencies, the chief executive officer is the executive director.

# For municipal light plants, the chief executive officer is the general manager.

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

**Getting Started**

* Municipalities or other entities submitting an application to the Green Communities Division for the FIRST TIME will need to provide basic information to their [Regional Coordinator](http://www.mass.gov/eea/energy-utilities-clean-tech/green-communities/green-communities-coordinators/). Please provide the municipal or entity name, legal address including zip code, and the primary contact name, title, email, and phone number. For municipalities that are Designated Green Communities, provide the name and email of the primary contact who will submit the META grant application to the Regional Coordinator.
* **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](http://www.mass.gov/eea/energy-utilities-clean-tech/green-communities/green-communities-coordinators/)

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

1. Technical assistance agencies include: Regional Planning Authorities, Councils of Governments, Extension Services, and Joint Powers Entities that provide clean energy assistance to municipalities. [↑](#footnote-ref-1)
2. This includes both Owner’s Agent Technical Assistance (OATA) grants last offered in 2014 and META grants offered beginning in 2015 and 2016. [↑](#footnote-ref-2)
3. 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. [↑](#footnote-ref-3)
4. American Society of Heating, Refrigerating and Air-Conditioning Engineers [↑](#footnote-ref-4)
5. 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. [↑](#footnote-ref-5)
6. American Society of Heating, Refrigerating and Air-Conditioning Engineers [↑](#footnote-ref-6)