



THOMAS M. MENINO
MAYOR

Office of the Mayor
Environmental and Energy Services
James W. Hunt, III, Chief

Renew Boston Facilitation Consultant
Issued July 1, 2009—Due July 27, 2009

INTRODUCTION

Overview

The City of Boston acting through its Office of Environmental and Energy Services (E&ES), Boston City Hall, Room 603, Boston, MA 02201, seeks proposals from a consultant or a team of consultants to serve as **Renew Boston Facilitation Consultant(s)** (FC). The FC will support:

- (1) The creation of an innovative service delivery entity—**Renew Boston**—that coordinates the provision of energy efficiency and alternative energy services to all Boston businesses and residents;
- (2) Renew Boston's implementation of the City of Boston's \$6,506,200 award under the American Recovery and Reinvestment Act (Recovery Act), Energy Efficiency and Conservation Block Grant (EECBG), and related Recovery Act opportunities; and
- (3) Renew Boston's coordination of energy efficiency funding and programs created under the laws of the Commonwealth of Massachusetts.

History

On March 6, 2009, Mayor Thomas M. Menino announced the creation of **Renew Boston** to further his ambitious goals:

- 200 megawatt electricity demand response and avoided demand growth through energy efficiency and alternative energy installations by 2017;
- 25 megawatts of solar power installations by 2015;
- 7 percent reduction of greenhouse gas emissions below 1990 levels by 2012 and an 80 percent reduction by 2050.

On March 30, 2009, Mayor Menino, joined by Former Vice President Al Gore, named the Boston Climate Action Leadership Committee, a 21 member group representing a

broad spectrum of the community charged with charting Boston's collective response to climate change. Among many other tasks, the Leadership Committee will inform the Mayor's ongoing creation of Renew Boston.

On June 24, 2009, the City of Boston filed its *Energy Efficiency Conservation Strategy*, as required by the Recovery Act, EECBG (see Appendix for outline). Mayor Menino and the Office of Environmental and Energy Services drafted a ten-part plan for the EECBG's \$6,506,200 allocation to the City of Boston. The City's EECBG strategy focuses on providing Boston's residents and small businesses with the financial resources they need to make their homes and workplaces more efficient while also helping them cut their energy bills. The City has developed a plan that will stretch Boston's federal dollars by leveraging \$20 million from existing utility programs and by accessing private-sector financial resources. The City's EECBG initiative sets an ambitious goal of reducing the City's greenhouse gas emissions by 40,000 metric tons annually. Boston's plan will also stimulate green industries and create 100 high-quality green-collar jobs.

Also on June 24, 2009, Mayor Menino launched the **Renew Boston Residential Energy Efficiency Program Pilot Program**. The \$200,000 Renew Boston pilot is funded by Boston Connects, Inc., and its Empowerment Zone Green Job Creation project, and a corporate charitable contribution. The EZ project is designed to move 8-14 Empowerment Zone residents into green careers as energy auditors and auditors' assistants while also creating residential energy savings within EZ communities. The Renew Boston pilot will provide full funding for 160 homes of Boston residents with median income between 60-120% to receive a comprehensive energy audit and Level 1 energy efficiency work provided by Next Step Living, Inc, a new Boston company located at the Marine Industrial Park. Renew Boston pilot participants will be identified by the Massachusetts Energy Consumers Alliance and by the City's Community Action Program (CAP) provider, Action for Boston Community Development (ABCD) from applicants who exceed ABCD's 0-60% median income guidelines for its energy efficiency services.

Renew Boston Overview

To further advance the Mayor's goals, the City seeks to create a single organization, **Renew Boston**, with the mission to help residents and businesses use less energy and generate their own clean energy. **Renew Boston** aims to *coordinate customer-sited energy service delivery*, particularly energy efficiency and alternative energy services. The City's intends for **Renew Boston** to:

- (1) provide one-stop shopping for Boston residents and businesses interested in energy efficiency and alternative energy work on existing buildings in Boston (webpage/call center intake);
- (2) organize provision of energy efficiency and alternative energy services for Boston residents and businesses by municipal and quasi-City agencies, non-profit and for-profit entities;

- (3) coordinate provision of financing of energy efficiency and alternative energy services by municipal and quasi-City agencies, non-profit and for-profit entities,
- (4) coordinate education and outreach programs to connect services with businesses and residents;
- (5) coordinate and track connection of businesses and residents with auditors and contractors providing energy efficiency and alternative energy services; monitor and verify contractors' work;
- (6) coordinate connection between the Boston Public Schools and green collar workforce development programs; and
- (7) develop performance management and GIS/information technology platform to support outreach strategies and monitor and verify installations for energy efficiency and greenhouse gas emissions reductions.

The FC retained by E&ES will support the creation of Renew Boston by recommending:

- the form of entity and management model that best achieves Renew Boston's mission,
- the administrative location(s) of its services (with consideration of government and quasi-government agencies, utilities, independent non-profit organizations, and for profit companies), and
- a financing plan to ensure long-term self-sufficiency.

Source of Funding

The FC position is made possible by grants totaling \$250,000 from the Barr Foundation and The Boston Foundation to the Boston Charitable Trust Fund (BCTF). For the purposes of the grants, and for overseeing the FC position, E&ES will act as lead agent on behalf of the BCTF. E&ES will coordinate the review of all proposals, selection and supervision of service providers, and will requisition funds from the BCTF for FC payment.

Eligible Applicants

Eligible applicants include consultants with extensive experience in:

- Facilitation of new program development involving numerous municipal agencies, quasi-governmental agencies, and external partners, including
 - Organization Models and Accountabilities
 - Corporate development and strategy
 - Finance, capital and operating
 - Information Technology
 - Marketing and Sales
- Existing Energy Efficiency and Alternative Energy Programs
 - Federal incentives, particularly tax law
 - State incentives
 - Utility incentives
- City of Boston departments

- Quasi-City agencies
- Non-Governmental Organizations involved in energy efficiency and alternative energy service provision
- Organizing and managing brainstorming processes; synthesizing and finalizing policy recommendations as to the structure and location of a new program

The City encourages multi-disciplinary team proposals. It is possible that E&ES could award multiple contracts for FC tasks. In such event, the total amount of contracts will not exceed \$250,000.

Scope of Work

1) The FC is expected to start work August 2009 for a one-year position. The consultant is expected to work in the E&ES office, Boston City Hall, Room 603, under the direct supervision of the Director of Energy Policy. The FC will work on a weekly basis—whether full-time or part-time, or a combination of both—between the hours of 9 A.M. and 5 P.M., Monday through Friday. E&ES will exercise flexibility with respect to the need for work under the contract to be performed outside the office and the hourly time when work will be performed during the work week. The consultant will bill for services on an hourly rate, which must include all overhead and fringe benefits, if applicable. Upon selection, the consultant will enter into a contract with E&ES.

2) The FC will work with an internal Renew Boston Formation Group to survey existing resources (e.g. programs and expertise) across departments and partnership organizations [See Appendix]:

- Existing program strengths and weaknesses;
- Constituents served;
- Program interaction;
- Potential for synergistic program use; potential for leverage of other resources;
- Gap analysis.

(3) The FC will assist E&EA and the Renew Boston Formation Group to prepare for the best use of new resources available to support Renew Boston and to create a program that operates sustainably after the Recovery Act's 36 month timeframe. Primary focus will be on resources provided by:

- The Recovery Act's Energy Efficiency and Conservation Block Grant (EECBG), formula grant \$6,506,200.

Focus will also be on resources available to the City from:

- Discretionary EECBG funds for which the City of Boston can apply from the Commonwealth of Massachusetts; and
- New sources of bond funding available under the Recovery Act, including Qualified Energy Conservation Bonds, Clean Renewable Energy Bonds, Property Assessed Clean Energy bonds.

Focus will also be on Renew Boston's opportunity to coordinate external resources:

- Recovery Act funding to the Commonwealth of Massachusetts' State Energy Program (SEP);
- Recovery Act funding to Weatherization Assistance Programs (WAP); and
- Funding for Massachusetts energy efficiency programs regulated by the Department of Public Utilities, including programs funded by system benefit charges and proceeds from the Commonwealth's participation in the Regional Greenhouse Gas Emissions (RGGI) auction processes.

(4) The FC will facilitate a Renew Boston visioning process involving City departments, quasi-City agencies, and collaborating partners that

- Creates opportunities for inter-departmental/agency/partners brainstorming and dialogue. Questions will include:
 - What services should Renew Boston provide to Boston residents and businesses?
 - Where could these services best be housed?
 - How can Renew Boston support the financing for these services, using both conventional resources and innovative financing mechanisms?
 - Given existing programs identified in the survey, how can they best be reorganized, branded, and coordinated to best serve City priorities; how can City resources be leveraged to meet the ideal vision and Renew Boston policy goals?
 - What are the limits of existing resources, and what capacity, programs, and/or tools need to be created to more fully realize the Renew Boston's goals?
- Benchmarks against national and international best practices
- Examples:
 - Cambridge Energy Alliance;
 - Efficiency Vermont;
 - Chicago Climate Action Plan;
 - Boulder County, CO, Climate Smart Energy Efficiency Upgrade Program;
 - Center of Wisconsin Studies (COWS) and Milwaukee Energy Efficiency (ME2);
 - Delaware Sustainable Energy Utility;
 - New York City's PlaNYC;
 - Babylon, NY , Long Island Green Homes Program;
 - San Francisco Clean Energy Loan Program;
 - Toronto HELP (Home Energy Loan Program);
 - London Climate Change Authority;
 - United Kingdom, Borough of Woking.

(5) The FC will facilitate a Renew Boston consensus-building process with recommendations addressing:

- the form of entity and management model (including oversight, implementation, and monitoring and verification) that best achieves Renew Boston's mission,
- the administrative location(s) of its services (with consideration of government and quasi-government agencies, utilities, independent non-profit organizations, for profit companies), and
- the fiscal structure and financing plan to ensure long-term self-sufficiency

(6) The FC will coordinate the Renew Boston visioning process involving the internal Renew Boston Formation Group with the **Renew Boston Advisory Committee** named by Mayor Menino. **E&ES Staff will manage the Renew Boston Advisory Committee's work.** The Committee will include subject-matter experts on energy efficiency and alternative energy service delivery, including social marketing expertise. Committee membership will include municipal and state governmental officials and representatives from utilities, labor, academia, and community-based organizations. .

PROPOSAL REVIEW PROCESS

Application Process and Schedule

Applicants must submit an original and three (3) copies of the application in a sealed envelope marked "Renew Boston Facilitation Consultant Position" no later than 5:00 PM, Monday, July 27, 2009.

<p style="text-align: center;">No applications will be accepted after <u>5:00PM (EDT), Monday, July 27, 2009.</u></p>
--

Completed applications must be submitted directly to:

Bradford Swing
Director of Energy Policy
Office of the Mayor
Environmental and Energy Services
Boston City Hall, Room 603
Boston, MA 02201

Contact Information

Questions regarding this RFP should be directed to Bradford Swing, Director of Energy Policy, who may be reached by telephone at (617) 635-3425 or by e-mail at brad.swing@cityofboston.gov.

Selection Criteria

All applications will be reviewed by E&ES staff for eligibility under the program. Applications will be rated by a Review Committee based upon the strength of the proposal (experience with municipal and quasi-governmental organization; capacity with organization models and accountabilities, corporate development and strategy, finance (capital and operating), information technology, marketing and sales; knowledge of existing energy efficiency and alternative energy programs, including federal, state and utility incentives; demonstration of new program development facilitation; evidence of participation in similar or comparable Scope of Work activities); the applicant's organizational experience and capacity to fulfill FC tasks in a timely manner; and the hourly rate and total cost to provide the consultant services.

PROPOSAL SUBMISSION REQUIREMENTS

Proposal Requirements

At a minimum, all submittals must include:

1. A cover letter;
2. A statement demonstrating the respondent's understanding of the project, indicating how the team meets the desired qualifications, skills, and experience;
3. A description of the respondent's approach to performing the FC tasks outlined in the RFP. Proposers must demonstrate a thorough understanding of the scope of work and the expertise and capacity to address the required tasks;
4. A description of the team's qualifications, structure, and leadership, including resumes of key personnel, summaries of successfully completed relevant projects and associated deliverables, and descriptions of each team member's role in those projects. Include client contact names and telephone numbers;
5. A statement of availability and hourly rates that will be charged for key personnel, including all fringe benefits and overhead. The proposer must detail the total cost to perform all scope of work tasks, which will be a "not to exceed" amount. Upon selection, the consultant will enter into a contract with E&ES for the total cost stated; work tasks will be performed and compensated on an hourly basis.

Proposal Review

A selection committee composed of members of the Mayor's Office, E&ES, the Barr Foundation, and The Boston Foundation will evaluate submissions based on the team's qualifications, understanding of the project, proven relevant experience, and cost-effectiveness. A contract will be awarded to the responsible and responsive proposer with the most advantageous proposal, taking into consideration all evaluation criteria.

E&ES reserves the right to waive portions of the RFP for all applicants, to excuse minor informalities on proposals, or to reject all proposals, if deemed in the best interest of the City of Boston.

APPENDIX

Collaborating and partnership organizations

City of Boston departments and Quasi-City agencies include:

- Mayor's Office
 - Food and Fuel Anti-Poverty Initiative
 - Thrive in Five
 - Elderly Commission
 - Interagency Green Building Committee (Green Team)
- Department of Neighborhood Development
 - Homecenter
 - Homeworks
 - Heatworks
 - Neighborhood Housing Development
 - Green Affordable Housing Program
 - Business Development
 - Boston Buying Power
 - Main Streets
 - Loans and Bond programs
 - Boston Local Development Corporation (BLDC)
 - Boston Industrial Development Financing Authority (BIFDA)
 - Empowerment Zone coordination (Boston Connects, Inc.)
- Boston Redevelopment Authority
 - Jobs and Community Services
 - Green Collar Workforce Initiative
 - Empowerment Zone Coordination
 - Boston Connects, Inc.
 - Residential EE Pilot Program
 - Boston's One-Stop Career Centers
 - Economic Development
 - Development Review
 - Community Development and Housing
 - Institutional Planning and Development
 - Industrial Development
 - Marine Industrial Park
 - Financial Services
 - BLDC
 - BIFDA
 - Tax-Exempt Bonds for Non-Profit Institutions
 - Tax-Exempt Industrial Development Bonds (IDB's)
 - Tax-Exempt Enterprise Zone Facility Bonds (EZ Bonds)
 - Taxable Bonds

- Economic Initiatives
 - Green Tech Initiative
 - Efficient Newmarket
 - Back Streets
 - LifeTech Boston
- Planning and Zoning
 - Green Building Zoning
 - Wind Zoning
 - Government Center Green Growth District
 - Development Review Guidelines-Energy Protocol
 - Information technology/GIS
- Research
- Boston Public Schools
 - Superintendent's Office
 - Coordination with Green Tech Workforce Development
- Office of Environmental and Energy Services
 - Mayor's Climate Action Leadership Committee coordination
 - Boston Energy Alliance vision
 - \$300-500 million revolving loan fund
 - 200 megawatt demand reduction
 - 25-35% Boston's electricity customer participation
 - Coordination with Mass Efficiency Program
 - Solar Boston
 - 25 megawatt goal by 2015
 - Boston Green Fund (City-led carbon offset program)
 - Parks Department
 - Grow Boston Greener
 - 100,000 trees by 2020
 - Environment Department
 - Air Pollution Control Commission
 - Climate Action Plan Implementation
 - Lights Out Boston
 - Inspectional Services Department
 - Building Permitting
- Office of Administration and Finance
 - Boston About Results performance management
- Office of Information Technology
 - Boston Website
 - Enterprise GIS
 - Wireless Boston
- Boston Public Health Commission
 - Environmental Health
 - Healthy Cities Initiative
 - Asthma Prevention and Control
- Boston Water and Sewer Commission

- Billing function

Boston non-governmental organizations include:

- Action for Boston Community Development
- Mass Energy Consumers Alliance
- Boston Climate Action Network
- Community Labor United
- Alternatives for Community and the Environment (ACE)
- A Better City
- Boston Chamber of Commerce
- Labor Unions

Utilities

- NSTAR
- National Grid
- Veolia/Trigen Steam

Energy Efficiency Conservation Strategy

City of Boston Energy Efficiency and Conservation Block Grant *Energy Efficiency Conservation Strategy, June 25, 2009*

The American Recovery and Reinvestment Act of 2009 (Recovery Act) allocated \$6.5 million to the City of Boston through the U.S. Department of Energy's Efficiency and Conservation Block Grant (EECBG). Mayor Menino and the Office of Environmental and Energy Services have drafted a ten-part plan for the use of these funds. The City's EECBG strategy focuses on providing Boston's residents and small businesses with the financial resources they need to make their homes and workplaces more efficient while also helping them cut their energy bills. The City has developed a plan that will stretch Boston's federal dollars by leveraging existing utility programs and by accessing private-sector financial resources. The City's EECBG initiative sets an ambitious goal of reducing the City's greenhouse gas emissions by 40,000 metric tons annually. Boston's plan will also stimulate green industries and create 100 high-quality green-collar jobs.

Residential Programs:

1. Energy Retrofit Program for Existing Homes

EECBG funds: \$2 million; Potential funds leveraged: \$5.3 million

Under this program, the City of Boston will encourage homeowners to make energy-efficient home improvements by leveraging EECBG funds to establish a weatherization program for homeowners with 60-120% of state median income. This population has been underserved by traditional federal and utility-sponsored energy efficiency programs. The new retrofit program will augment existing utility energy efficiency programs to provide no-cost home energy retrofits to Boston residents. The City plans to retrofit more than 2,000 Boston homes.

2. Energy Efficiency Program for Multi-Family Buildings

EECBG funds: \$1 million; Potential funds Leveraged: \$2.7 million

The City will improve the energy efficiency of multi-family buildings, with a focus on affordable housing. This program will build on the City's Green Affordable Housing Program (GAHP). Under GAHP, the Department of Neighborhood Development administered funding to integrate energy efficiency, renewable energy, green building, and healthy homes strategies into affordable housing. With EECBG funds, the GAHP program will now target the efficiency of existing buildings. EECBG funds will be used to benchmark the energy performance of DND's existing housing stock and to make efficiency improvements in poorly performing buildings.

3. Residential Retrofit Program and Solar Pilot

EECBG funds: \$300,000; Potential funds leveraged: \$6.2 million

The City will stimulate the residential solar market by creating a Boston Energy Challenge. This initiative will leverage the new NSTAR Solar program, utility energy efficiency incentives, and third-party financing to increase the number of residential renewable energy systems in the City. The program will incentivize homeowners to invest in deep energy efficiency retrofits by offering them no-upfront-cost solar power purchase agreements. This program aims to install more than 100 residential solar systems in the City.

4. Rental Property Energy Audit Ordinance Research and Development

EECBG funds: \$100,000

Nearly two thirds (2/3) of Boston residents live in rental properties. Traditionally, it has been difficult to incentivize landlords to make energy efficiency improvements on their properties as they often are not responsible for energy bills. Additionally, potential renters have no way to easily compare the energy performance of properties, meaning landlords who invest in energy efficiency cannot capture the benefits of providing efficient properties. The City will use EECBG funds to develop policies that encourage landlords to upgrade the energy performance of their properties. EECBG funds will also be used to develop a public information website that will allow residents to search a rental property database that includes energy efficiency ratings. Research under this program will help inform the City's wider climate action activities.

5. Community Based Program Outreach

EECBG funds: \$500,000

Marketing energy efficiency services requires effective community engagement and focused public outreach. Community-based marketing has proven to be a successful way of reaching a broad range of residents. The City will coordinate with community organizations to design and implement an outreach strategy that effectively targets every Boston neighborhood. The City will work with schools, churches and neighborhood-based groups to promote its EECBG incentive programs.

Small Business Programs:

6. Small Business Energy Efficiency Program

EECBG funds: \$1,000,000; Potential funds leveraged: \$2.3 million

The City of Boston will encourage small businesses to make energy-efficiency improvements by leveraging EECBG funds to establish a small business incentive program. The City program will augment existing utility small business energy efficiency programs and federal tax credits to provide low-cost retrofits to Boston small businesses. This program will help struggling business during the economic downturn.

Municipal Programs:

7. Energy Savings Performance Contract Buy Down for Municipal Building

EECBG funds: \$500,000; Potential funds leveraged: \$6 million

The City of Boston will use EECBG funds to buy-down the cost of an energy savings performance contract (ESPC) at the City's main library branch at Copley Square. This building has had previous energy audits and has been targeted as one of the City's largest energy consumers. The City will use EECBG funds to procure a performance contracting owner's agent off a list of state-approved agents. Owner's agents are technical experts with a background in building sciences. The owner's agent will represent the City in any negotiations with energy services companies. This agent will produce an energy savings performance contract RFP for the library. Once the RFP is issued and an ESCO contractor has been procured, the City will use \$475,000 of EECBG funds to bring down the payment price of the ESPC and help the City realize operational budget savings.

8. Municipal Solar Installation on Archives

EECBG funds: \$400,000; Potential funds leveraged: \$545,000

The City of Boston recently acquired and renovated a large building at 201 Rivermoor Street in West Roxbury to house the City's archival materials. This building has a large, open roof that can accommodate several hundred kilowatts of solar photovoltaics (PV). Preliminary feasibility analysis of the site, funded through the U.S. Department of Energy's Solar America Cities program, indicates that this building would be an excellent site for a large solar array. The City will use \$400,000 of EECBG funds to support this project. The City expects to leverage more than \$575,000 in rebates from the state's Commonwealth Solar initiative. At current market rates (~\$6.50 per kW), Boston will be able to acquire a 150kW system with these funds. Over its 25-year lifetime, a system of this size could be expected to produce 4,665 megawatt hours of electricity.

9. Municipal Energy Office

EECBG funds: \$300,000

The City of Boston will establish a municipal energy office to coordinate energy efficiency and renewable energy practices for public buildings. Initial staffing will be one full-time position and 1-2 college interns. Due to a City hiring freeze, this position will initially be a full-time contractor. The position will be staffed by a Certified Energy Manager or by someone with a similar skill set. The office will develop and implement a comprehensive energy strategy for municipal buildings. Energy office staff will produce

a baseline inventory of all energy use by facility and operation, track future energy use, assess the potential value of energy improvements, coordinate energy savings performance contracts, leverage utility energy efficiency programs and private financing, implement energy projects and programs and maximize the city's demand response capacity. The municipal energy office will become self-financing beyond the three-year grant period by capturing a portion of energy efficiency and conservation savings.

10. LED Street Light Deployment Pilot
EECBG funds: \$50,000

The City of Boston will pilot two LED street light projects. Building on Boston's leadership with LED traffic lights, the City is studying the installation of LED street lights. As with LED traffic lights, LED street lights use a fraction of the energy consumed by conventional lights and have the potential to generate significant savings through energy efficiency and reduced maintenance. Boston expects that investments in LED streetlights will payback between 3-7 years. Initial surveys have demonstrated that LED street lights can also improve the quality of outdoor lighting, and the longer service life of LED's can serve an important public safety role.