ROY COOPER
Governor
ELIZABETH S. BISER
Secretary
JULIE WOOSLEY
Director

NORTH CAROLINA
Environmental Quality

July 12, 2023

Ms. Stephanie Ashley
Executive Director
Blue Ridge Community Action, Inc.
800 North Green Street
Morganton, North Carolina 28655

Subject: Review of Blue Ridge Community Action's Application for the Weatherization Assistance Program's Five-Year Bipartisan Infrastructure Law Funding Opportunity

Dear Stephanie,

Congratulations on behalf of the North Carolina Department of Environmental Quality, State Energy Office. Your application submitted for the *"Weatherization Assistance Program's (WAP) Five-Year Bipartisan Infrastructure Law (BIL) Funding Opportunity"* has been conditionally approved in the amount of $10,683,880 for *"Region 6"*. As a condition of the subaward, the WAP will be required to conduct a public hearing in accordance with 10 CFR 440.14 and 10 CFR 440.15 to formally adopt your organization as the qualified provider for *"Region 6"* of the BIL program. In addition, to receive the full funding amount, at least 30% of housing units in North Carolina's BIL State Plan must be weatherized within the funding timeframe.

Please note that as a result of progress evaluations, WAP may, at its delegated discretion, authorize the following actions: (1) continue to fund the project, contingent upon the availability of funds appropriated by the United States Department of Energy for the purpose of this program and the availability of future-year budget authority; (2) place a hold on funding the project, pending further supporting data or funding; or (3) discontinue funding for the project because of insufficient progress, change in strategic direction, or lack of funding.

Before proceeding with next steps, Blue Ridge Community Action must sign the acknowledgement form concerning the following documents for the BIL program by July 21, 2023:

- Application Assessment Rubric
- Five-Year BIL State Plan
- Health and Safety Plan
- Standard Work Specifications
- Training and Technical Assistance Plan

A digital *"RightSignature"* package will separately provide the above documents to you within two business days. Thank you for your willingness to participate in the BIL program. Together, we will implement a robust program that best serves North Carolina's underserved and disadvantaged communities.

Sincerely,

Matthew Davis

Matthew F. Davis
State Energy Office
Weatherization Supervisor

5 Yr. BIL Application Assessment Rubric

2023

Subgrantee Name: Blue Ridge Community Action

Criteria	Low		Medium		High		
	Description	Score	Description	Score	Description	Score	
1.SEO Pre-Review:							Comment Box (Applicable to Low Scores)
a. Expenditures	Subgrantee expended less than 80% of its allocation during FFY2022-23.		Subgrantee expended 80% to 89% of its allocation during FFY2022-23.		Subgrantee expended 90% or more of its allocation during FFY2022-23 -OR- Not Applicable	High Ranking	
b. Deliverables	Subgrantee delivered less than 80% of its contractual obligations in FFY2022-23.		Subgrantee delivered 80% to 89% of its contractual obligations in FFY2022-31.		Subgrantee delivered 90% to 100% of contractual obligations in FFY2022-23 -OR- Not Applicable	High Ranking	
c. Responsiveness	Subgrantee was not responsive to calls or email inquiries.		Subgrantee was moderately responsive to calls or email inquiries.		Subgrantee was very responsive to calls or email inquiries -OR- Not Applicable	High Ranking	
2. SEO Pre-Review Financial Performance Assessment:							
a. Financial Reporting	Financial Status Reports were submitted late greater than 25% of the time during FFY2022-23.		Financial Status Reports were submitted late between 1% to 25% of the time during FFY2022-23.		All Financial Status Reports were submitted on time during FFY2022-23 -OR- Not Applicable	High Ranking	
3. Single Family Questions							
3.1. Agency Experience & Preparedness to implement Wx services and blending funding opportunities (5 pts)	Low - No experience - 2 years experience, staff needs to be ramped up No Experience Blending Funding		Moderate - 3-9 years experience in Wx, staff in place Moderate/Some Experience in Blending Funding		High - More than 10 yrs. & Wx staff in place, performing Wx Blending Funding is a standard practice within the agency	5	
3.2 Proposed Wx contractors or related partners (3 pts)	No list and/or limited list		Partial list and subgrantee recognizes the need to more partners		List of contractors in place and working in Wx	3	
3.3 How will subgrantee implement ee measures and clean energy upgrades to assist in a more resilient energy grid? (5 pts)	Minimum EE and clean energy measures		EE measures and some clean energy approach		EE Measures. clean energy and working with outside entities/resources	5	
3.4 Recruitment strategies to Wx DACs and Priority Populations. (5 pts)	Business as usual. No demonstration to collaborate with Focus Area 1.		Demonstrated willingness to target disadvantaged communities and priority populations, but are leveraging a limited number of new partnerships to maximize impacts. Moderate demonstration to collaborate with Focus Area 1.		Explore outreach opportunities including working with the agency who is accountable for Focus Area 1	5	
3.5 What demographics/metrics collected and how PII is safe? (5 pts)	All demographic populations are covered, Paper copies only, little to no mention of how documents are secured, shredded after electronic upload.		Have physical paper copies of client files and metrics; however, files are under lock/key of authorized personnel and are stored electronically in an encrypted database management system with authorization from key case workers.	3	Data is stored and transferred using an encrypted database management system. Uses access controls to limit access to authorized personnel. Paper copies are shredded after scanned / uploaded into the system.		
3.6 Strategies to minimize Wx deferrals and increase completed units? (7 pts)	Business as usual, primarily using DEQ funding, Wx Readiness and/or LIHEAP $, going beyond could be difficult for the agency. There is no clear plan or strategy to minimize deferrals		Agency has a plan that incorporates braiding/blending funds from relevant organizations.		Innovative ideas are well thought out, realistic. timely, and articulated, even though they haven't been implemented yet.	7	
3.7 How to retain modern workforce in Wx. For current employees, relevant training, career advancement. (5 pts)	Low emphasis on retaining and advancing a modern workforce in weatherization through various strategies and opportunities.		Emphasis on retaining and advancing a modern workforce in weatherization through various strategies and opportunities.		Strong emphasis on retaining and advancing a modern workforce in weatherization through various strategies and opportunities.	5	
3.8 How will this project support equitable job opportunities, increase diversity, aid in training/apprenticeship placement, and commit to jobs with living wages and benefits that align with Justice40 initiatives? (10 pts)	No clear plan in place to support equitable job opportunities, J40 is not addressed		An outline exists for taking on apprentices, living wages, and J40, but it is not detailed.		A detailed plan is created to support apprentices, living wages, and J40 initiatives.	10	
3.9 What procedures for ongoing reporting to SEO on project process, project setbacks? (7 pts)	Minimum strategy utilizing "Accountable Results for Community Action" (AR4CA) database and "Financial Status Report, 286"		Some details of project progress relayed beyond the minimum strategy.		Project process and project setbacks articulated, anticipated and outlined process on how to handle breakdowns of project setbacks.	7	
3.10 Identify at least one or more Go/NoGo milestones in project (3 pts)	Milestones not addressed.		At least one or more milestones identified, but the timeframes and progress reports are not detailed.		Complete milestone plan with detailed timeline and progress reports.	3	
4 Unit Schedule and Workforce:							
a. Unit completion is outlined in budget and appears reasonable	Unit completions and costs are identified, but they appear unreasonable for each quarter.		Unit completions and costs are identified and reasonable, but they slightly exceed the maximum ACPU without a footnote.		Unit completions and costs are identified and reasonable. Overall, the ACPU is achieved.	High Ranking	
b. Workforce T&TA	Planning workbook does not adequately support the single/multifamily responses.				Planning workbook adequately supports the single/multifamily responses.	High Ranking	

SEO Pre-Review Technical and Financial Score	High Ranking
Key Operations and Personnel Experience Score	53
Unit Schedule and Workforce	High Ranking
Cumulative Application Score *(Needs 40 to Pass)*:	**53**
Level:	ACCEPT

Assessment Completed by:

Matthew Davis
Type Name

Matthew Davis
Signature

Weatherization Supervisor
Type Title

7/6/2023
Date

Overall, the application is comprehensive and exceptional for participating in the 5-year BIL program. The document is clear, concise, and delivers a holistic message about BRCA's vision for accomplishing NC WAP's core objectives in Region 6. There are minor suggestions that could be implemented for the application for items such as: (1) integrating BRCA's vision for collaborating with Focus Area 1 of the T&TA approach; (2) shredding paper copies of files after scanning into the encrypted database for enhanced security; and (3) noting that 5-year BIL funds for T&TA will be mainly applied to Focus Areas 1, 2, and 3. As such, NC WAP recommends approval of the 5-year BIL application for BRCA.

Overall Impressions

Released March 2015

North Carolina Department of Environmental Quality

Weatherization Assistance Program
BIL Weatherization Provider Application

FORWARD

Funding Opportunity: This application is to receive funds for weatherization services under the Bipartisan Infrastructure Law (BIL). BIL was enacted on November 15, 2021, with the U.S. Department of Energy (DOE) releasing specific guidance for Weatherization Assistance Program (WAP) agencies under Weatherization Program Notice BIL 22-1 on March 30, 2022. Financial stimulus from the BIL will build on the historic strength of WAP by elevating funding for the next five years.

Application Timeline:

Application Activity	Time and Date
Application Sent by	3:00 pm Friday, June 16, 2023
Written Questions Due by	5:00 pm Thursday, June 23, 2023
Application Due by	5:00 pm Friday, June 30, 2023
Selected Service Providers Notified by	5:00 pm Friday, July 14, 2023

Statement of Need: The State Energy Office (SEO) at the North Carolina Department of Environmental Quality (NC DEQ) is committed to ensuring affordable, just, and equitable access to energy. The state recognizes that low-income North Carolinians are faced with many multifaceted challenges including inflation, high energy and housing costs, and continued market impacts from the COVID-19 pandemic. Thus, the WAP aims to reduce these stressors by improving home energy efficiency, thereby fostering a healthier and more affordable life for North Carolina residents. Based on these initiatives, WAP has played a key role in not only decreasing energy costs for low-income persons, but also in reducing carbon emissions as well as providing and promoting jobs in clean energy.

The purpose of weatherization services is to install energy conservation measures in the homes of income-eligible persons, especially homes occupied by the elderly, persons with disabilities, and children. Funds are applied to the most cost-effective conservation measures, which are determined by conducting an on-site energy audit of the dwelling. Energy conservation measures funded through the program may range from air sealing and insulating single-family homes to replacing heating systems, windows, and doors. WAP assistance is eligible in all types of housing units, including both single and multifamily housing, manufactured housing, and group homes. To achieve a successful WAP program, SEO plans to build a more sustainable WAP workforce, improve and innovate the existing WAP program, and surge the number of weatherized homes.

The SEO is in search of weatherization agencies for both single-family and multifamily units that will participate in a cooperative home repair approach.[1] The state has been divided into different

[1] SEO will follow 10 CFR 440.14 and 15 for the selection of weatherization service providers and corresponding regions.

regions that will be served by one collaborative (i.e. a Weatherization Hub) based on the geographic jurisdictions of NC's weatherization service providers (**Figure 1**). Participating agencies will receive free training in the collaborative home repair model to better serve low-income homeowners—this will include training of a unified intake process, collaborative case management process, and uniform program assessment strategies for services such as accessibility modifications, weatherization, home repair programs, and electrification assistance as needed.

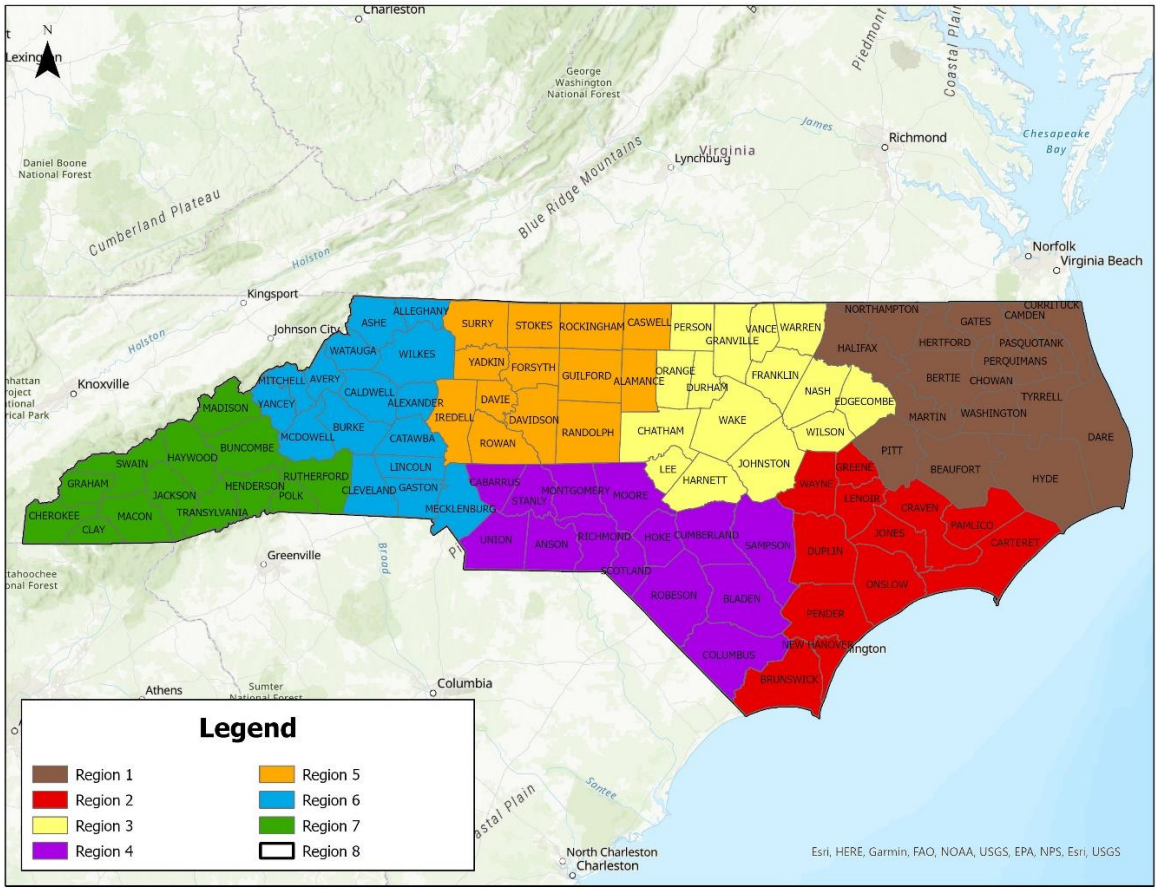

Figure 1. Map of North Carolina color coded by single family weatherization regions. Each region will house a collaborative hub that oversees weatherization and home upgrade services for eligible NC residents. Region 8 encompasses the entire state and is specifically for weatherization of multifamily homes.

The North Carolina SEO WAP will distribute $89,776,045 of BIL funds for the purpose of enhancing energy efficiency in the homes of low-income families, particularly those in disadvantaged communities (DACs), in all 100 counties of North Carolina. The WAP energy upgrades provide homeowners relief through energy savings and home improvements that support equitable health and safety for North Carolinians. The NC SEO anticipates that the ~$89.7M BIL stimulus will aid over 6,000 households across the state. $69.783M has been reserved for direct weatherization services (**Table 1**).

Table 1. Total 5-year Funding Distribution for Direct Weatherization Services by NC Region[2]

Region	Program Operations	Admin	Health & Safety	Total 5-year Allocation	Anticipated Number of Weatherized Units
1	$2,132,760	$284,700	$533,190	$2,950,651	266
2	$3,655,809	$488,010	$913,952	$5,057,771	456
3	$7,739,504	$1,033,139	$1,934,876	$10,707,519	966
4	$3,913,039	$522,348	$978,260	$5,413,647	489
5	$11,161,893	$1,489,991	$2,790,473	$15,442,357	1,394
6	$7,722,417	$1030,858	$1,930,604	$10,683,880	964
7	$3,522,266	$470,184	$880,567	$4,873,017	440
8	$10,592,424	$1,413,973	$2,648,106	$14,654,502	1,323
Total	**$50,440,112**	**$6,733,203**	**$12,610,028**	**$69,783,343**	**6,298**

BIL Reporting Requirements: Contingent on use of BIL funding, any selected entities will be mandated to follow the most up-to-date U.S. DOE and NC WAP program and reporting requirements. All grant awards made under this Program shall comply with applicable law and regulations including, but not limited to, the WAP regulations contained in the Code of Federal Regulations (CFR) at 10 CFR 440, DOE Financial Assistance Rules at 2 CFR 200, and the Bipartisan Infrastructure Law (Infrastructure Investment and Jobs Act), Public Law 117-58.

BIL Eligibility: To be eligible for BIL funds, the following qualifications of weatherization service providers must be met for implementation of contract activities:

1. Service Provider(s) must be a Community Action Agency or other public or nonprofit entity.
2. Service Providers(s) shall have detailed knowledge of, and experience in, weatherization services, including performance of energy efficiency retrofits.
3. Service Providers(s) shall be familiar with the North Carolina WAP and have relations with weatherization related agencies in the state.
4. Service Providers(s) should be familiar with methods for blending Federal, State, local funding opportunities in weatherization.
5. Service Provider(s) shall have the ability to complete projects equitably within the service area(s) (single-family) and/or throughout the state of North Carolina (multifamily).

[2] The funding allocations were calculated using U.S. DOE's Allocation Formula that incorporates factors such as heating/cooling degree days, low-income population based on U.S. Census data (S1702), and residential energy burden based on U.S. DOE's LEAD tool. This methodology may be found in 10 CFR 440.10(3) and (4).

North Carolina Department of Environmental Quality

Weatherization Assistance Program—
BIL Weatherization Provider Application

I. Applicant Details

Applicant Name: Blue Ridge Community Action, Inc.
Mailing Address: 800 N. Green St., Morganton, NC 28655
Street Address: same as above
Agency Website: www.brcainc.org
Telephone Number: 828.438.6255

Board Chair
Name: Inita Smith
Email: [redacted]
Direct Phone: [redacted]

Executive Contact
Name: Stephanie Ashley
Email: [redacted]
Direct Phone: [redacted]

Program Contact
Name: Shawna Hanes
Email: [redacted]
Direct Phone: [redacted]

Fiscal Contact
Name: Karen Harshman
Email: [redacted]
Direct Phone: [redacted]

II. Certification

THIS IS TO CERTIFY THAT TO THE BEST OF MY KNOWLEDGE THE INFORMATION CONTAINED IN THIS APPLICATION IS TRUE AND CORRECT PRIOR TO SUBMISSION TO NC SEO.

Stephanie E. Ashley

Name of Executive Director/CEO

Stephanie E. Ashley

Signature of Executive Director/CEO

6/28/2023

Date of Certification

Application Directions: Please fill out all applicable questions using concise and clear language in the boxes below. **You may extend your answers beyond the length of the boxes provided.** Please mark yes or no questions in boxes with an "X". Point values have been assigned to all questions for evaluation. Entities applying for single-family weatherization must score 40 pts or higher to be selected for BIL funding. Entities applying for multifamily only or both multifamily and single-family must score 52 pts or higher to be selected for BIL funding.

Applications shall be in sent in PDF format with the subject of: "Weatherization Assistance Program—BIL Funding Application, *[Your Agency Name]*". Please submit the application by 5:00 pm Friday, June 30, 2023 via email to Matthew Davis at matthew.davis@deq.nc.gov AND Helen Hossley at Helen.Hossley@deq.nc.gov.

The SEO will not respond to verbal questions. All written questions received by 5:00 p.m. Eastern Standard Time, on Thursday, June 22, 2023 will be answered in writing.

Confidentiality: If an applicant deems that certain information required by this application is confidential, the applicant must label such information as CONFIDENTIAL prior to submission. For each subsection marked as CONFIDENTIAL, the proposer must provide a convincing explanation and rationale sufficient to justify an exemption of the information from release under the Freedom of Information Act. The explanation and rationale must be stated in terms of (a) the prospective harm to the competitive position of the proposer that would result if the identified information were to be released and (b) the reasons why the information is legally exempt.

III. Weatherization Services

3.1 Please describe your agency's experience and preparedness to implement weatherization services and blending funding opportunities within your service area. (5 pts)

see attachment

3.2 Please provide a list of proposed weatherization contractors or related partners. (3 pts)

see attachment

3.3 How will you and partners implement (1) energy efficient and (2) clean energy upgrades that assist in a more resilient energy grid? (5 pts)

see attachment

3.4 Please provide a description of the recruitment strategies that will be utilized to find units to weatherize throughout the state. Specifically, how are units within disadvantaged communities and households with elderly, disabled, young children, high energy burden, and high energy users recruited. (5 pts)

see attachment

3.5 What demographics and metrics will be collected for persons in units to be weatherized? How does your agency keep the private and personal information of clients safe? (5 pts)

see attachment

3.6 What strategies and methods will your agency use to reduce weatherization deferrals and increase completed units? (7 pts)

see attachment

3.7 How will your agency retain and advance a modern workforce in weatherization? For current employees, please include relevant training opportunities, career advancement opportunities, and any other relevant information. (5 pts)

see attachment

3.8 How will this project support equitable job opportunities, increase the diversity of hired employees, aid in training/apprenticeship placement within the energy sector, and commit to jobs with living wages and benefits that align with Justice40 initiatives? (Please note that participating in the apprentice program and placing apprentices within their organization will likely be a requirement under BIL funding.) (10 pts)

see attachment

3.9 What procedures will be used for ongoing reporting to NC SEO on project progress and any project setbacks (with root cause analysis)[3] encountered? These reporting strategies should go beyond the "Accountable Results for Community Action" database and Financial Status Report "286". (7 pts)

see attachment

3.10 Identify at least one or more Go/No-Go milestones in the project. A Go/No-Go milestone is a major milestone in the project that if not completed on time may result in a cancellation of the subaward. Progress towards meeting the Go/No-Go milestones must be reported in the quarterly progress reports submitted to NC DEQ and U.S. DOE. At these Go/No-Go milestones, NC DEQ will evaluate project performance, schedule adherence, and contribution to the WAP goals and objectives. (3 pts)

see attachment

[3] A "root cause analysis" is the process of discovering the underlying causes of problems in order to identify appropriate long-term solutions.

IV. Single-Family Services

Are you applying for weatherization of single-family units? [X] Yes [ ] No

If you answered yes to the question above, please answer question 4.1 below.

4.1 Based on Figure 1 (see page ii), please specify the service region(s) your agency will serve. Please note that more than one region may be selected.

[ ] Region 1 [ ] Region 2 [ ] Region 3 [ ] Region 4

[ ] Region 5 [X] Region 6 [ ] Region 7

V. Multifamily Services

Are you applying for weatherization of multifamily units? [ ] Yes [X] No

By applying for multifamily weatherization services, my agency agrees to weatherize multifamily homes equitably throughout the state of North Carolina (Region 8). [ ] Yes [X] No

If you answered yes to both of the questions above (Section V), please answer the following questions (5.1–5.4). If no to multifamily services, please leave the questions below blank. Go to Section VI.

5.1 What methods will you use to certify weatherization eligibility multifamily households? (5 pts)

Not applicable

5.2 Please provide a description of the recruitment strategies that will be utilized to find multifamily units to weatherize throughout the state. Specific methods to reduce weatherization deferrals in the state for multifamily units should be discussed. (10 pts)

Not applicable

5.3 Describe any additional training required to conduct multifamily weatherization. How will training in multifamily weatherization assist in creating a modern workforce in weatherization? (5 pts)

Not applicable

5.4 Any BIL-funded weatherization work on multifamily buildings with 5 or more units will be required to pay wages to all laborers and mechanics engaged in the construction, alteration, or repair of those multifamily buildings (whether employed by a contractor or subcontractor) wages "at rates not less than those prevailing on similar projects in the locality, as determined by the Secretary of Labor." Please describe how you will abide by these Davis Bacon Act requirements. (7 pts)

Not applicable

VI. Required Application Attachments

6.1 Resume(s) of those who will manage the weatherization program. If applying for both single-family and multifamily weatherization services, please specify which manager will be responsible for each service type (if applicable).

6.2 Completed Budget Template in PDF format. Excel Budget Template provided.

6.3 Certificates of Insurance that document relevant coverage for weatherization services, the limits of liability and coverage dates of Service Provider(s) policies. All documents and coverage must be current and applicable to the requested service region(s).

6.4 Statement of Confidentiality (if applicable).

6.5 Please provide us with your most recent Financial Status Report "286" for FY 22-23.

III. Weatherization Services cont.

3.1 Please describe your agency's experience and preparedness to implement weatherization services and blending funding opportunities within your service area.

BRCA has a wealth of experience and a strong level of preparedness to implement weatherization services and blend funding opportunities within its service area. Over the years, BRCA has demonstrated successful and efficient operation of the Weatherization Assistance Program in the counties served. This experience provides a solid foundation for facilitating the BIL Weatherization program in the assigned region.

BRCA has invested in the necessary infrastructure to handle 4 key focus areas: increased intake, increased production, development of a workforce, and sound fiscal management necessary to meet the targets set by SEO. This infrastructure includes adequate facilities, equipment, staffing, and systems to effectively manage the program's operations and administrative tasks.

1. **INCREASED INTAKE**
   BRCA has implemented a centralized intake approach as an integral part of its operational model. This innovative strategy enables the intake staff to proactively engage with clients who may not have sought out BRCA's weatherization services initially, providing them with valuable education about the benefits of weatherization for their households. With their in-depth understanding of how weatherization assistance works and the necessary eligibility criteria, the intake staff can effectively determine which clients would benefit from the program.

   In addition to the centralized intake system, BRCA has a satellite office situated in Charlotte's Ascend Nonprofit Solutions building, which serves as a central hub for social services for clients within our target demographic. This strategic location enhances our accessibility and allows us to cater to the needs of a wider range of individuals and families. New intake staff will be hired upon award of assigned region.

   BRCA also plans to collaborate with other Community Action Agencies in the assigned region who are currently providing non-BIL weatherization services in an effort to utilize their already established methods of outreach.

2. **INCREASED PRODUCTION**
   To ensure high-quality services, BRCA currently has five **certified** Quality Control Inspectors/Energy Auditors on staff. These professionals bring an average of 8.6 years of experience in the field, with the most senior auditor having over 13 years of experience. Their expertise and knowledge enable BRCA to conduct thorough assessments and audits of weatherization projects, ensuring compliance with standards and regulations.

   BRCA plans to collaborate with other Community Action Agencies in the assigned region who are currently providing non-BIL weatherization services in an effort to utilize their already established methods of installing energy efficient measures via their in-house crews or state approved contractors.

3. **WORKFORCE DEVELOPMENT**
   Recognizing the need for additional resources in anticipation of increased funding and productivity, BRCA has a General Contractor on staff who is actively in the process of hiring crew members for on-site work. This step has been taken to supplement the efforts of state-approved contractors. By expanding our workforce, BRCA aims to efficiently scale up operations and meet the demand for weatherization services.

4. **FISCAL MANAGEMENT**
   In terms of financial management, BRCA's Weatherization and Finance Department are highly skilled at leveraging and blending funding from multiple complementary sources (Duke, PNG, BCBS Healthy Home Initiative, etc.). This expertise allows BRCA to maximize the impact of available resources and effectively allocate funding across various weatherization and home improvement projects. By combining funding opportunities, BRCA can enhance the overall scope and reach of its weatherization efforts.

   Furthermore, BRCA's Energy Director brings 11 years of experience to the table, ensuring sound leadership and expertise in the field. Our Finance Director has fiscally managed weatherization for 20+ years. Additionally, BRCA’s Executive Director has previous experience operating a Weatherization program that covered an 11-county area. Their knowledge and insights provide valuable guidance and strategic direction to BRCA's weatherization initiatives.

Overall, BRCA's extensive experience, well-equipped infrastructure, certified professionals, financial management capabilities, and seasoned leadership team make it a capable and prepared agency to implement weatherization services and effectively blend funding opportunities within an extended service area.

3.2 Please provide a list of proposed weatherization contractors or related partners.

Here is a list of proposed weatherization contractors and related partners that BRCA currently utilizes to provide weatherization services to eligible clients:

SHELL
Builders Services dba Austin Company
Efficiency 1st Residential
Green Horizons Innovators
Johnsons Construction
GreenServe

ELECTRICAL
Southern Electrical
Rutherford Heating & Air
Helms Electrical

HVAC
DRF Enterprise dba Century Services
Jerry's Mechanical
Carolina Comfort Service
Rutherford Heating & Air
Carolina Air Experts
Benchmark Heating

AUDIT
Efficiency 1st Residential
Opulence Dynasty Renewables (new)
Energy Home Inspection (new)

Please note that most of these contractors have been working with BRCA for a number of years and are well-versed in BRCA's processes for distributing work including audits, work orders, and pictures (via sharefile), invoicing and payment schedules, and quality control (inspections, change orders, reviews, and surveys). There are a couple of new contractors indicated above (Auditing firms: Opulence Dynasty Renewables and Energy Home Inspection) who have recently joined BRCA's network.

NOTE: BRCA intends to supplement contractor work with in-house crews while soliciting participation from additional contractors year-round.

As it relates to plumbing work, our current contractor Benchmark Heating is expected to have a valid NC Plumbing license by July 1, 2023. Additional plumbing services will be overseen by our on-staff General Contractor.

3.3 How will you and partners implement (1) energy efficient and (2) clean energy upgrades that assist in a more resilient energy grid?

IMPLEMENTATION OF ENERGY EFFICIENT UPGRADES:

To implement energy-efficient upgrades, BRCA and our partners will follow a systematic approach that involves the following steps: a) Assessment and Audit, b) Recommendations, c) Project Planning, d) Installation and Retrofitting, e) Quality Control and Inspections.

a) BRCA will conduct comprehensive energy assessments and audits of clients' properties to identify areas of energy inefficiency and potential improvements. This will involve examining the building envelope, insulation, HVAC systems, lighting, refrigerators, and other relevant factors.

b) Based on the audit results, recommendations will be provided for energy-efficient upgrades. These may include insulation improvements, sealing air leaks, upgrading to energy-efficient refrigerator, lighting conversions, and optimizing HVAC systems.

c) BRCA’s certified Energy Auditors will develop a detailed project plan (work order), including cost estimates and scope of work.

d) Qualified contractors will carry out the installation and retrofitting work according to the project plan. This may involve upgrading insulation, replacing outdated appliances, upgrading HVAC systems with energy-efficient units.

e) Rigorous quality control inspections will be conducted to ensure that the energy-efficient upgrades meet programmatic standards and guidelines (SWS) and county building codes.

IMPLEMENTATION OF CLEAN ENERGY UPGRADES:

BRCA recognizes the importance of collaborating with utility companies to expand opportunities for clean energy upgrades for the clients we serve. We have a history of successful partnerships with utility companies, and we aim to continue and strengthen these collaborations in the future.

One notable collaboration was our participation in the Community Solar Pilot Program initiated by NCDEQ (North Carolina Department of Environmental Quality) in coordination with Blue Ridge Energy.

Through this program, BRCA was able to enhance the weatherization process by offering clients access to renewable energy through solar power. Clients received a 15 to 20-year subscription to community solar panels located at Patterson School's solar farm in Lenoir, NC.

This initiative not only provided energy efficiency improvements to clients but also introduced them to the benefits of renewable energy. By leveraging community solar resources, we were able to extend the reach of clean energy to clients who may not have had access otherwise.

Building on this success, BRCA is eager to foster further partnerships with utility companies. These collaborations will enable us to provide similar innovative and sustainable improvements to our clients in the future. By working together, we can leverage resources, expertise, and funding to expand the availability of clean energy upgrades, such as solar installations and other renewable energy solutions, to a larger number of households.

These partnerships with utility companies will be instrumental in advancing our mission of promoting energy efficiency, resilience, and sustainability. We look forward to cultivating these relationships and working together to bring clean energy benefits to the communities we serve.

3.4 Please provide a description of the recruitment strategies that will be utilized to find units to weatherize throughout the state. Specifically, how are units within disadvantaged communities and households with elderly, disabled, young children, high energy burden, and high energy users recruited.

Our recruitment strategies are designed to reach a wide range of households throughout our territory, with a particular emphasis on disadvantaged communities and households facing specific challenges such as elderly, disabled individuals, young children, high energy burdens, and high energy users. The following approaches are utilized:

1. Door-to-Door Outreach: Conducting door-to-door outreach in targeted low-income areas is a chief strategy for recruitment. This approach allows us to directly engage with residents, assess their needs, and provide information about our weatherization services.
2. Mutual Referrals: We establish partnerships with social service organizations that serve disadvantaged communities. Through mutual referrals, we collaborate with these organizations to identify eligible households in need of weatherization assistance.
3. Information Dissemination: Informative letters and brochures are distributed to local churches, community centers, and other gathering places to raise awareness about our weatherization services. Public service announcements are also broadcasted through local media channels to reach a wider audience.
4. Collaborative Events: We actively participate in local collaborative events, such as community fairs and resource expos, to connect with households facing energy burdens. These events provide opportunities to educate attendees about the benefits of weatherization and initiate the recruitment process.
5. Web-based Meetings with Partners: Regular web-based meetings are conducted with partner organizations to share information and updates about our weatherization program. This ensures that our partners are well-informed and can refer eligible households to us.

6. Presentations to Civic Groups and Organizations: We make presentations to various civic groups, organizations, and community associations to raise awareness about our weatherization services. These presentations highlight the benefits of weatherization and how it can alleviate energy burdens.
7. Collaboration with Energy Providers: We collaborate with local energy providers for cross-referral and information distribution. This partnership helps us identify households with high energy burdens or consumption patterns that may benefit from weatherization services. Our partnership with Duke Energy, specifically, has yielded 580 leads directed to BRCA as a result of the collaborative marketing campaign since the beginning of May 2023. This will be an ongoing source of referrals for the agency.

Tailored Recruitment Approaches:

1. Elderly and Disabled: Presentations and recruitment efforts are concentrated at Senior Centers, Nutrition Sites, and various senior citizen activities to reach elderly individuals. For disabled clients, similar recruitment tactics are utilized.
2. Young Children: To ensure the inclusion of families with young children, we focus on sharing information and giving presentations at daycare centers and during Head Start parent meetings. This targeted approach helps us reach households with young children who may benefit from weatherization services.

Our recruitment strategies are multifaceted and tailored to engage and inform households within disadvantaged communities, including those with specific challenges such as elderly, disabled individuals, young children, high energy burdens, and high energy users. Through these efforts, we aim to ensure that our weatherization services reach those who need them the most.

3.5 What demographics and metrics will be collected for persons in units to be weatherized? How does your agency keep the private and personal information of clients safe?

BRCA recognizes the importance of collecting demographic and metrics information for all clients served through the Weatherization Assistance Program. These data points are crucial for assessing client eligibility and measuring program effectiveness.

To ensure the confidentiality and privacy of our clients' personal information, BRCA has implemented robust measures and safeguards. Here are the steps we take to protect client data:

1. Restricted Access: Client information obtained during the intake process is securely stored in both the state's database (AR4CA) and BRCA's internal database (CAP60). This includes but is not limited to client income, household members' identification, home ownership documentation, applicable case notes, and other confidential information. Access to these databases is limited to registered and approved staff members who have undergone proper training and background checks.
2. Confidentiality Policies: BRCA has strict confidentiality policies in place that all staff members must adhere to. These policies outline the protocols for handling and storing client information, emphasizing the importance of data privacy and prohibiting unauthorized disclosure.

3. Data Redaction: To further protect sensitive information, all social security numbers are redacted from physical files before they enter the weatherization department. This helps minimize the risk of identity theft or unauthorized access to personal data.
4. Secure Database Management: BRCA's internal database (CAP60) is a trusted nonprofit data management system used by 40 states and serving 1.2 million clients. This system is designed to meet industry standards and best practices for data security, ensuring that client information remains protected.

By implementing these measures, BRCA maintains a strong commitment to safeguarding the private and personal information of our clients. We recognize the sensitive nature of the data we collect and handle, and we strive to uphold the highest standards of data privacy and security throughout our operations.

3.6 What strategies and methods will your agency use to reduce weatherization deferrals and increase completed units?

BRCA has implemented several strategies to reduce weatherization deferrals and increase the number of completed units. These strategies include:

1. Collaboration with Community Partners: BRCA actively seeks opportunities for collaboration with other entities in the community. By leveraging additional funding sources and resources, we can address issues that may fall outside the scope of traditional weatherization services. This collaborative approach allows us to provide comprehensive solutions and reduce deferrals.
2. Referrals to Other Housing Programs: BRCA recognizes that some clients may have exceptional needs that extend beyond the scope of weatherization. In such cases, we refer clients to other housing programs that specialize in addressing those specific needs. Our application process includes language that allows BRCA to share information with other agencies, with the client's permission, to ensure a coordinated approach to meeting their housing needs.
3. Utilization of DOE Readiness Funding: BRCA plans to maximize the utilization of available DOE Readiness funding to address issues that historically contribute to clients being put on the deferral list. These may include significant repairs such as roofs, plumbing, electrical, or minor to moderate structural repairs. By leveraging this funding, we can address critical issues and move clients from the deferral list to completed projects.
4. Utilization of In-House Crews: BRCA has in-house crews that can be deployed to address measures that are not allowable with weatherization funding but are necessary to complete a project. This flexible approach allows us to overcome obstacles and ensure that as many units as possible are weatherized and completed.
5. Pre-Audits: To streamline the weatherization process and identify homes that may fall outside the scope of weatherization early on, BRCA conducts pre-audits. This proactive approach enables us to quickly identify homes that may require significant repairs or fall into the deferred category. By identifying these cases early, we can allocate resources more efficiently and focus on projects that align with weatherization requirements.

By implementing these strategies, BRCA aims to minimize deferrals and increase the number of completed units, ensuring that more households benefit from the weatherization assistance program.

3.7 How will your agency retain and advance a modern workforce in weatherization? For current employees, please include relevant training opportunities, career advancement opportunities, and any other relevant information.

BRCA already places a strong emphasis on retaining and advancing a modern workforce in weatherization through various strategies and opportunities. Here's how we plan to ensure the development and growth of our employees:

1. Competitive Salaries and Fringe Benefits: BRCA offers highly competitive salaries and outstanding fringe benefits, ensuring that our weatherization staff is compensated adequately. Our agency's comprehensive fringe benefits, encompassed by an exceptional indirect cost rate, rival those offered by leading companies in the market. This approach has contributed to a low turnover rate among our staff.

2. Tiered Approach and Career Advancement for Field Staff: BRCA implements a tiered approach to positions within the weatherization department. New auditing staff members are hired as WAP Project Manager I and are expected to acquire the required training outlined in the NC Training and Technical plan including but not limited to obtaining their Building Analyst/Envelop certifications and progress through BRCA's on-the-job training processes toward the higher-level WAP Project Manager II position. Once they complete the necessary on-the-job training hours and auditing experience, auditors can sit for the BPI QCI test. Upon successfully passing, staff transitions to the WAP Project Manager II position, accompanied by a salary increase.

3. Ongoing Field Training Opportunities: BRCA is committed to providing training opportunities for staff members. We plan to offer training focused on weatherization continuing education, clean energy applications, and multifamily weatherization. The weatherization continuing education track includes additional training in CAZ (Combustion Appliance Zone) testing, cost-effective air sealing techniques, and auditing and inspecting using modern technology. The clean energy applications track includes training from the NC Clean Energy Technology Center, specifically covering topics such as the Fundamentals of Solar PV Design and Installation, Solar Storage, and Hands-on Solar PV labs. These training programs allow our staff to gain insights into the benefits of solar power and how to integrate clean energy upgrades with weatherization practices. The multifamily weatherization track includes building on the existing multifamily knowledge of auditors through trainings provided by Community Housing Partners and Piedmont Triad Regional Council covering topics such as Weatherizing Small Multifamily Buildings and Gap Multifamily Quality Control Inspector.

4. Administrative Support Staff Development: BRCA will provide opportunities for administrative support staff to receive training in areas such as office automation, quality customer service, and utilizing various quantitative reporting methods. Each support staff is required to become proficient at using various reporting systems as well as utilizing Microsoft Suites, Google Suits, and a variety of databases. This ensures that our administrative team possesses the necessary skills to support efficient operations and deliver excellent service to our clients as well as provide them with marketable skills.

5. Outreach Staff Development: BRCA will provide opportunities for administrative support staff to receive training in areas such as eligibility determination, quality customer service, and utilizing

various quantitative reporting methods. Each outreach staff is required to become proficient at public speaking, event planning, and client file management. This ensures that our outreach team possesses the skills to promote the program via varied platforms to diverse populations.

6. Conferences and Peer Learning: BRCA encourages ALL weatherization staff members to attend informational conferences within the weatherization/energy industry. These conferences facilitate peer-to-peer learning and provide opportunities for our staff to interact with other professionals in the field, enhancing their knowledge of whole-house, administrative support, and outreach concepts while fostering personal and professional growth.

By implementing these strategies, BRCA maintains a motivated and skilled workforce, ensuring that our staff members are equipped with the necessary training and development opportunities to excel in their roles within the weatherization program.

3.8 How will this project support equitable job opportunities, increase the diversity of hired employees, aid in training/apprenticeship placement within the energy sector, and commit to jobs with living wages and benefits that align with Justice40 initiatives? (Please note that participating in the apprentice program and placing apprentices within their organization will likely be a requirement under BIL funding.)

BRCA is committed to supporting equitable job opportunities, increasing the diversity of hired employees, facilitating training and apprenticeship placements within the energy sector, and providing jobs with living wages and benefits aligned with the Justice40 initiatives. Here's how we plan to accomplish these goals:

1. Targeted Job Postings: To promote equitable job opportunities and increase diversity among our employees, BRCA will advertise positions through organizations that align with the Justice40 Initiative goals. Job postings will be shared with clients receiving and/or applying for services, local community colleges, Historically Underutilized Business Associations, non-profit organizations serving similar clientele (such as United Way and Goodwill), Historically Black College and Universities, and ethnic organizations in our assigned region. This targeted approach aims to attract a diverse pool of applicants and create inclusive employment opportunities.

2. Participation in Apprenticeship Program: BRCA fully intends to participate in the apprenticeship program outlined in the State of North Carolina Bipartisan Infrastructure Law Weatherization Assistance Plan. This program will not only provide valuable training and skill development opportunities, but it will also ensure a competitive pay structure with an hourly rate of $30 (plus benefits). By actively engaging in apprenticeships, we enable individuals to gain the necessary skills and knowledge for successful placements within the energy sector. This aligns with our mission of Helping People, Changing Lives, as it empowers individuals to become self-sustainable through meaningful employment. This opportunity will be life changing for participants.

By actively pursuing these strategies, BRCA contributes to the Justice40 initiatives by promoting equity, diversity, and training opportunities within the energy sector. We believe that offering jobs with competitive wages and benefits ensures a sustainable and supportive work environment that aligns with the principles of Justice40.

3.9 What procedures will be used for ongoing reporting to NC SEO on project progress and any project setbacks (with root cause analysis) encountered? These reporting strategies should go beyond the "Accountable Results for Community Action" database and Financial Status Report "286".

BRCA will provide comprehensive and transparent reporting to NC SEO regarding program progress, setback encountered, and any root cause analyses. Here's an overview of the procedures we will utilize for ongoing reporting:

1. Quarterly Progress Reports: BRCA will submit detailed quarterly progress reports to NC SEO. These reports will go beyond basic financial reporting and will encompass comprehensive updates on project activities, milestones achieved, challenges faced, and mitigation strategies employed. The reports will include quantitative data, such as the number of units weatherized, and client demographics, as well as qualitative information, such as project highlights and lessons learned if applicable.

2. Root Cause Analysis for Setbacks: In the event of project setbacks, BRCA will conduct comprehensive root cause analyses to identify the underlying reasons. We will investigate the factors that contributed to the setback, assess their impact on project progress, and determine effective strategies for resolution and prevention. This proactive approach will ensure continuous learning and help us achieve better program outcomes. This information will be reported to SEO in the quarterly report or immediately if need be.

3. Proactive Communication: BRCA understands the importance of proactive communication with NC SEO regarding project progress and any encountered setbacks. We will maintain open lines of communication to promptly report any deviations from the planned schedule, unexpected challenges, or potential risks.

4. Reporting Guidelines Compliance: BRCA will strictly adhere to the reporting guidelines and requirements specified by NC SEO. We will ensure that all relevant data and information are accurately captured and reported in the prescribed format. This includes providing detailed narratives, supporting evidence, and data analysis to offer a comprehensive view of project progress.

Through detailed updates and thorough root cause analyses of setbacks encountered, BRCA aims to foster a proactive approach that enables timely problem-solving and informed decision-making. By adhering to these reporting procedures, we strive to maximize the project's success and impact, ensuring transparency and accountability throughout the process.

3.10 Identify at least one or more Go/No-Go milestones in the project. A Go/No-Go milestone is a major milestone in the project that if not completed on time may result in a cancellation of the subaward. Progress towards meeting the Go/No-Go milestones must be reported in the quarterly progress reports submitted to NC DEQ and U.S. DOE. At these Go/No-Go milestones, NC DEQ will evaluate project performance, schedule adherence, and contribution to the WAP goals and objectives.

BRCA has identified one Go/No-Go milestone for this project. The completion of 43% of the allocated units by the end of Q2 2025 (*Contingent upon receipt of allocation)* through the project is a critical assessment point of the project's progress and performance. This milestone signifies a major checkpoint, and its timely achievement is crucial to ensure the continuation of the subaward. Progress towards meeting this milestone will be reported in the quarterly progress reports submitted including any root cause analysis to NC SEO.

BUDGET AND PRODUCTION PLANNING		
Region Allocation	$ 10,683,880	
Total Administration	$ 1,030,858	
Program Operations	$ 7,722,417	
Health and Safety	$ 1,930,604	
Total Budget Check	$ 10,683,879	
ACPU Operations	$ 8,010.81	
ACPU Total	$ 8,010.81	**<---- The BIL ACPU is $8,009 for all years.**

	PRODUCTION		
Quarterly Performance Period	**Number of Planned Units**		
Q1 (tentative start October 1, 2023)	*0*	2023	
Q2	*0*		
Q3	*0*		
Q4	*50*		
Year 1 Subtotal	50		
Q1	*50*	2024	
Q2	*50*		
Q3	*65*		
Q4	*65*		
Year 2 Subtotal	230		
Q1	*70*	2025	
Q2	*70*	420	0.435684647
Q3	*75*		
Q4	*75*		
Year 3 Subtotal	290		
Q1	*80*	2026	
Q2	*80*		
Q3	*80*		
Q4	*80*		
Year 4 Subtotal	320		
Q1	*74*	2027	
Q2	*0*	Q2 - Q4 (Program could be extended, but it is not a guarantee)	
Q3	*0*		
Q4	*0*		
Year 5 Subtotal	74		
TOTAL	**964**		

WORKFORCE PLANNING

	CURRENT:		PLANNED:	
Subgrantee Workforce	Staff	Contractors	Staff	Contractors
RITs and Crew Leads/Architectural Contractors	*1*	*5*	*7*	*5*
Energy Auditors/QCI	*5*	*3*	*8*	*3*
Trade Professionals (HVAC, electric, etc.)	*0*	*8*	*2*	*12*
Program Managers/Directors	*2*	*0*	*3*	*0*
WAP Support/Admin	*2*	*0*	*5*	*0*
Other - Intake/Outreach	*4*	*0*	*6*	*4*
Other -	0	0	0	0
Total	14	16	31	24

planned totals including current and additional staff needed

Please provide responses to the following:	**Response:**
1) What is your current average timeframe for hiring and onboarding new staff?	The current average timeframe for hiring and onboarding new staff in the weatherization department at BRCA is relatively short, spanning around two months. Once a candidate is selected and hired, the onboarding process typically takes approximately one week. During this time, the new employee will review and complete the necessary employment documents specific to BRCA. They will also be introduced to the agency's staff, familiarize themselves with the organization's processes, and become acquainted with the physical location. Following the initial onboarding week, the new staff members are promptly integrated into the weatherization department for extensive on-the-job training. This hands-on training approach allows them to gain practical experience and acquire the necessary skills to carry out their duties effectively.
2) What are your primary challenges in the hiring and onboarding process?	BRCA faces four major challenges in the hiring and onboarding process. These challenges include: 1. Attracting qualified candidates for this specialized work: Finding candidates with the specific skills and experience needed for the available positions can be a challenge. It requires actively sourcing and targeting individuals who possess the required expertise in weatherization services. 2. Building a diverse applicant pool: Ensuring diversity and inclusion in the hiring process is important, but it can be a challenge to attract a diverse range of applicants. 3. Competition for talent from other organizations: The demand for qualified individuals in the field of weatherization services may lead to competition with other organizations seeking to hire similar talent. 4. Passive candidate engagement: Engaging with passive candidates, who may not be actively seeking new opportunities, presents a challenge.
3) Do you anticipate receiving support from other program staff at the Subgrantee level? If yes, what role will shared staff fill?	Yes, BRCA anticipates receiving support from other program staff at the Subgrantee level. 1. Outreach (CSBG Case Managers): These staff members will play a crucial role in reaching out to the community and identifying individuals or families who could benefit from the services provided by BRCA. They will engage with clients, assess their needs, and connect them with the appropriate resources and assistance.
4) If you plan to add contractors at the Subgrantee level, what is your goal for executing contract(s)? Please provide dates.	Our RFP is open year round so that any potential contractors are able to apply to become an approved WAP contractor. Those contractors would also be used to complete BIL weatherization. BRCA plans to execute contracts with BIL contractors with the effective date of January 1, 2024.
5) Do you anticipate your agency shifting from crew-based to contractor-based models, or vice-versa? Please explain.	BRCA has a General Contractor on staff who is actively in the process of hiring crew members for on-site work. This step has been taken to supplement the efforts of state-approved contractors. By expanding our workforce, BRCA aims to efficiently scale up operations and meet the demand for weatherization services. BRCA will use both contractors and internal crews to complete jobs.
6) Provide any additional comments on your plans for ramping up workforce.	BRCA plans to collaborate with other Community Action Agencies in the assigned region who are currently providing non-BIL weatherization services in an effort to utilize their already established methods of installing energy-efficient measures via their in-house crews or state-approved contractors. During the initial phase of scaling up, BRCA plans to inform clients, especially those in the Justice40 Initiative demographic, who participate in any of our existing programs about the available BIL weatherization positions. This approach has the potential to benefit our clients in two ways: firstly, by providing comprehensive human services to those clients, and secondly, by offering employment opportunities to clients interested in joining the BIL weatherization program.

TRAINING AND TECHNICAL ASSISTANCE PLANNING Note: This tab does not imply that Temporary Subgrantees will directly receive T&TA funds. It is only intended to assist with planning purposes.

PLANNING								
Training Topic(s)	**Training Category**	**Comprehensive or Specific Training?**	**Planned Year and Quarter**	**Training Center/Provider**	**Estimated Costs**	**Total Number of Participants**	**Actual Costs**	**Remarks/Comments**
Building Analyst/Envelop	*Field*	*comprehensive*	*TBD*	*CHPor PTRC*	*$2,825.00*	7	$19,775 00	Paid for NC SEO
BPI EA	*Field*	*comprehensive*	*TBD*	*CHP or PTRC*	*$1,150.00*	4	$4,600.00	Paid for NC SEO
BPI QCI	*Field*	*comprehensive*	*TBD*	*CHP or PTRC*	*$2,245.00*	4	$8,980.00	Paid for NC SEO
NEAT/MHEA	*Field*	*specific*	*TBD*	*CHP or PTRC*	*$2,099.00*	4	$8,396.00	Paid for NC SEO
HVAC Fundamentals	*Field*	*specific*	*TBD*	*CHP*	*$2,099.00*	9	$18,891 00	Paid for NC SEO
CAZ	*Field*	*specific*	*TBD*	*CHP*	*$695.00*	8	$5,560.00	Paid for NC SEO
IDL	*Field*	*specific*	*TBD*	*CHP*	*$5.49*	8	$43.92	Paid for NC SEO
LEAD SAFETY FOR RENOVATION, REPAIR, AND PAINTING	*Field*	*specific*	*TBD*	*EI GROUP*	$220.00	8	$1,760.00	Paid for NC SEO
ASBESTOS OPERATIONS & MAINTENANCE	*Field*	*specific*	*TBD*	*EI GROUP*	$450.00	15	$6,750.00	Paid for NC SEO
CPR/BLOOD BORNE PATHOGENS	*Field*	*specific*	*TBD*	*DANE COOK*	$549.00	20	$10,980 00	Paid for NC SEO
METRICS OF MOISTURE	*Field*	*specific*	*TBD*	*PTRC*	$2,200.00	8	$17,600 00	Paid for NC SEO
ASHRAE	*Field*	*specific*	*TBD*	*CHP or PTRC*	$650.00	4	$2,600.00	Paid for NC SEO
MANUFACTURED HOME FUNDAMENTALS	*Field*	*specific*	*TBD*	*CHP*	$2,395.00	4	$9,580.00	Paid for NC SEO
ADVANCED HVAC TROUBLESHOOTING	*Field*	*specific*	*TBD*	*CHP*	$1,995.00	8	$15,960 00	Paid for NC SEO
OSHA 30	*Field*	*comprehensive*	*TBD*	*TBD*		15	$0.00	Paid for NC SEO
GAP MULTIFAMILY QCI	*Field*	*comprehensive*	*TBD*	*CHP*	$1,995.00	4	$7,980.00	Paid for NC SEO
WEATHERIZING SMALL MULTIFAMILY BUILDINGS	*Field*	*specific*	*TBD*	*CHP*	$1,995.00	15	$29,925 00	Paid for NC SEO
FUNDAMENTALS OF SOLAR pv DESIGN AND INSTALLATION	*Field*	*specific*	*TBD*	*NC CLEAN ENERGY TECHNOLOGY CENTER*	$1,199.00	8	$9,592.00	Paid for NC SEO
SOLAR STORAGE	*Field*	*specific*	*TBD*	*NC CLEAN ENERGY TECHNOLOGY CENTER*	$799.00	8	$6,392.00	Paid for NC SEO
HANDS-ON SOLAR PV LABS	*Field*	*specific*	*TBD*	*NC CLEAN ENERGY TECHNOLOGY CENTER*	$799.00	8	$6,392.00	Paid for NC SEO
EXCEL	*Field*	*specific*	*TBD*	*SkillPath*	$199.00	8	$1,592.00	Paid for NC SEO
DEALLING WITH DIFFICULT CLIENTS	*Field/admin*	*specific*	*TBD*	*SkillPath*	$199.00	20	$3,980.00	Paid for NC SEO
BUILDING SCIENCE FUNDAMENTALS	*Field*	*comprehensive*	*TBD*	*PTRC*	$1,850.00	4	$7,400.00	Paid for NC SEO
DUCT BLASTER	*Field*	*specific*	*TBD*	*PTRC*	$1,100.00	8	$8,800.00	Paid for NC SEO
WEATHERIZATION APPLICATIONS FOR RESIDENTIAL ENERGY DYNAMICS	*Field*	*specific*	*TBD*	*PTRC*	$850.00	8	$6,800.00	Paid for NC SEO
INTRO TO ENERGY AUDITOR PRACTICAL SKILLS	*Field*	*comprehensive*	*TBD*	*PTRC*	$2,000.00	4	$8,000.00	Paid for NC SEO
CONFINED SPACE AWARENESS	*Field*	*specific*	*TBD*	*EI GROUP*	$450.00	8	$3,600.00	Paid for NC SEO
							$231,928.92	

[redacted] [redacted]

ACORD™ CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 8/18/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
McGriff Insurance Services LLC
Post Office Box 13941
Durham, NC 27709
919 281-4500

CONTACT NAME: Summer Phillips (NC)
PHONE (A/C, No, Ext): [redacted]
FAX (A/C, No): [redacted]
E-MAIL ADDRESS: [redacted]

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : Philadelphia Indemnity Insurance Co.	[redacted]
INSURER B : Technology Insurance Company	[redacted]
INSURER C : Tokio Marine Specialty Insurance Co.	[redacted]
INSURER D :	
INSURER E :	
INSURER F :	

INSURED
Blue Ridge Community Action Inc
800 N Green St
Morganton, NC 28655-5610

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY	X	X	[redacted]	07/01/2023	07/01/2024	EACH OCCURRENCE	$1,000,000
	CLAIMS-MADE / X OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	$100,000
							MED EXP (Any one person)	$5,000
							PERSONAL & ADV INJURY	$1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$2,000,000
	X POLICY / PRO-JECT / LOC						PRODUCTS - COMP/OP AGG	$2,000,000
	OTHER:							$
A	AUTOMOBILE LIABILITY	X	X	[redacted]	07/01/2023	07/01/2024	COMBINED SINGLE LIMIT (Ea accident)	$1,000,000
	X ANY AUTO						BODILY INJURY (Per person)	$
	OWNED AUTOS ONLY / SCHEDULED AUTOS						BODILY INJURY (Per accident)	$
	X HIRED AUTOS ONLY / X NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	$
								$
A	X UMBRELLA LIAB / X OCCUR			[redacted]	07/01/2023	07/01/2024	EACH OCCURRENCE	$1,000,000
	EXCESS LIAB / CLAIMS-MADE						AGGREGATE	$1,000,000
	DED / X RETENTION $10,000							$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			[redacted]	07/01/2023	07/01/2024	X PER STATUTE / OTH-ER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y / N: Y (Mandatory in NH)	N / A					E.L. EACH ACCIDENT	$500,000
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	$500,000
							E.L. DISEASE - POLICY LIMIT	$500,000
C	Pollution CL			[redacted]	07/01/2023	07/01/2024	1,000,000	
A	Professional Liab			[redacted]	07/01/2023	07/01/2024	1,000,000/2,000,000	
A	Abuse/Molest.			[redacted]	07/01/2023	07/01/2024	1,000,000/2,000,000	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

If required by written contract with the name insured, executed prior to a loss, Certificate Holder is included as Additional Insured with regards to General Liability and Auto Liability coverage.

**** Workers Comp Information ****

Proprietors/Partners/Executive Officers/Members Excluded: Terry Elliot, Barbara Myers, Hilary Ventura

CERTIFICATE HOLDER

N.C. Department of Environmental Quality
217 West Jones Street
Raleigh, NC 27699

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

[redacted] [redacted]

FSR-286

North Carolina Weatherization Assistance Program

BUDGET TO ACTUAL VARIANCE REPORT

Invoice Date	Invoice Number	PO Numbers	Federal Tax ID Number
May 2023	BRCA May23DOEWX	[redacted]	[redacted]

1. Name of Subgrantee and Complete Address:

Blue Ridge Community Action, Inc.
800 North Green Street
Morganton, North Carolina 28655

2. WAP/LIHEAP/HARRP CONTRACT NUMBERS: [redacted]

3. GRANT PERIOD: *From:* July 1, 2022 *To:* June 30, 2023

4. FINAL REPORT:

X	No
	Yes

5. ACCOUNTING BASIS:

CASH		Indirect Cost Rate
ACCRUAL	X	[redacted]

6. DATE REPORT SUBMITTED: *June 9, 2023*

7. REPORTING Month: May 1, 2023 - May 31, 2023

Category	8. Approved To Spend			9. Payments Received To Date			10. Available Balance (DEQ)		
	DOE WAP	LI WAP	HARRP	DOE WAP	LI WAP	HARRP	DOE WAP	LI WAP	HARRP
Training & Tech Assistance	$ 43,413			$ 43,413			$ -		
Administration	$ 59,738	$ 59,468	$ 31,109	$ 50,637	$ 59,468	$ 31,109	$ 9,101	$ -	$ -
Program Operations	$ 470,157	$ 992,625	$ 818,729	$ 462,771	$ 799,128	$ 717,746	$ 7,386	$ 193,497	$ 100,983
Health and Safety	$ 156,717	$ 309,205		$ 65,130	$ 108,686		$ 91,587	$ 200,519	
Readiness Fund	$ 49,250			$ 30,022			$ 19,228		
Total:	$ 779,275	$ 1,361,298	$ 849,838	$ 651,973	$ 967,282	$ 748,855	$ 127,302	$ 394,016	$ 100,983

14. Agency's GL Remaining Budget (Box 8 minus Box 13)

DOE WAP	LI WAP	HARRP
$ -		
$ -	$ -	$ -
$ -	$ -	$ -
$ -	$ -	
$ -		
$ -	$ -	$ -

Category	11. Total Expenditures Previous Report			12. Current Period Expenditures			13. Total Expenditures To Date		
	DOE WAP	LI WAP	HARRP	DOE WAP	LI WAP	HARRP	DOE WAP	LI WAP	HARRP
Training & Tech Assistance	$ 43,413			$ -			$ 43,413		
Administration	$ 50,637	$ 59,468	$ 31,109	$ 9,101	$ -	$ -	$ 59,738	$ 59,468	$ 31,109
Program Operations	$ 462,771	$ 799,128	$ 717,746	$ 7,386	$ 193,497	$ 100,983	$ 470,157	$ 992,625	$ 818,729
Health and Safety	$ 65,130	$ 108,686		$ 91,587	$ 200,519		$ 156,717	$ 309,205	
Readiness Fund	$ 30,022			$ 19,228			$ 49,250		
Total:	$ 651,973	$ 967,282	$ 748,855	$ 127,302	$ 394,016	$ 100,983	$ 779,275	$ 1,361,298	$ 849,838

15. DOE WAP Pmt Advance Balance

Advance	Recouped	Remain Bal
$ -	$ -	$ -
$ -	$ -	$ -
$ -	$ -	$ -
$ -	$ -	$ -
$ -	$ -	$ -

Total Contract Units	59	90	102
Completed To Date	57	87	117
Units Completed this Month	8	18	11
Average Cost Per Unit	$ 8,248	$ 11,409	$ 6,997
Energy Audits Completed this Month	0	6	N/A
Final Inspections Completed this Month	0	14	
Units in Progress	0	0	0
Percent of Units Completed	★ 97%	★ 97%	★ 115%
Percent of H&S expended	100%	100%	N/A
Percent of Total Expended	100%	100%	100%
Remaining Units to Complete	2	3	-15

DOE Advance \ Solar Advance	$ -	$ -	N/A
A. Cash Received, Grant to Date (as of submission date)	$ 651,973	$ 967,282	$ 748,855
D. Cumulative Landlord or Other Contributions	$ -	$ -	$ -
B. CASH Balance	$ (127,302)	$ (394,016)	$ (100,983)
C. Cash Requested	$ 127,302	$ 394,016	$ 100,983

Attach copies of the DOE, LIHEAP and HARRP Completed Units Reports

Reporting Month Activity
Reflect numbers from AR4CA

Clients on Waitlist	Initial Applicants	Applicants Denied	Applicants Approved	Units Deferred
485	14	8	24	0

Name of Preparer: Karen Harshman

Name of Prog Coordinator: *(Please Initial)* Shawna Tate

By signing this report, I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false

Name of Certifying Official, Title (Signature and Date)

Subgrantee: **Blue Ridge Community Action, Inc.**

Program: **DOE WAP**

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Contracted Units:	5	5	5	5	5	5	5	5	5	5	5	4	59
Actual Units Completed:	0	3	2	4	9	5	19	6	0	1	8	0	57
Variance to date:	**-5**	**-7**	**5**	**4**	**8**	**8**	**22**	**23**	**18**	**14**	**17**	**13**	**-2**

Program: **LI WAP**

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Contracted Units:	7	7	7	7	7	7	7	7	7	7	10	10	90
Actual Units Completed:	1	1	2	4	6	3	9	15	13	15	18	0	87
Variance to date:	**-6**	**-12**	**-17**	**-20**	**-21**	**-25**	**-23**	**-15**	**-9**	**-1**	**7**	**-3**	**-3**

Program: **HARRP**

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Contracted Units:	8	8	8	8	8	8	8	9	9	9	9	10	102
Actual Units Completed:	1	6	6	4	23	19	11	22	12	2	11	0	117
Variance to date:	**-7**	**-9**	**-11**	**-15**	**0**	**11**	**14**	**27**	**30**	**23**	**25**	**15**	**15**

Special Notes: