



North Carolina Department of Environmental Quality
State Energy Office
Weatherization Assistance Program
Infrastructure Investment and Jobs Act (IIJA)
Request for Proposal (RFP)
Weatherization of Single-Family Units

RFP release date: Friday, December 5, 2025

RFP deadline to respond: 5:00 pm Friday, January 23, 2026

ALL VENDORS:

The enclosed packet contains a "*REQUEST FOR PROPOSAL*" for Weatherization of Single-Family Units. **This approach is being utilized for the IIJA funds only. This solicitation model does not affect the annual Weatherization program design, or the funding allocated to the agencies supporting that program.**

The proposal consists of the following documents:

REQUEST FOR PROPOSAL

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I. Summary

The North Carolina Department of Environmental Quality (NC DEQ), State Energy Office, Weatherization Assistance Program (WAP) is committed to ensuring affordable, just, and equitable access to energy. Through the WAP, NC DEQ works to assist Low-to-Medium Income (*LMI*) residents in North Carolina (income of $\leq 200\%$ federal poverty level) with energy efficiency upgrades to reduce their energy burden and improve home living conditions. To boost programmatic outcomes, WAP is working to build a more sustainable workforce, innovate the existing WAP, and surge the number of homes served. WAP believes that persons in need can be served more effectively by the State if both federal and state funds are blended for home energy efficiency and essential health and safety renovations. For program success, the WAP envisions finding lead weatherization agencies for the 7 single family Weatherization Hubs in different regions of North Carolina. These lead weatherization agencies will participate in a local cooperative between local governments, home repair and community development organizations, aging related agencies, community social services, housing and development agencies, councils of governments, and other nonprofits.

II. Background

Low-income North Carolinians are faced with many multifaceted challenges including inflation, and high energy and housing costs. 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 WAP 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. Weatherization assistance is eligible in all types of housing units, including



both single and multifamily housing, manufactured housing, and group homes. To achieve a successful program, WAP plans to build a more sustainable weatherization workforce, improve and innovate the existing WAP, and surge the number of weatherized homes. The state of North Carolina aims to serve low-income persons, specifically those in disadvantaged communities (DACs) that could benefit from more energy-efficient dwellings.

WAP 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 regions that will be served by one collaborative hub (i.e., a Weatherization Hub) based on the geographic jurisdictions of North Carolina'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.

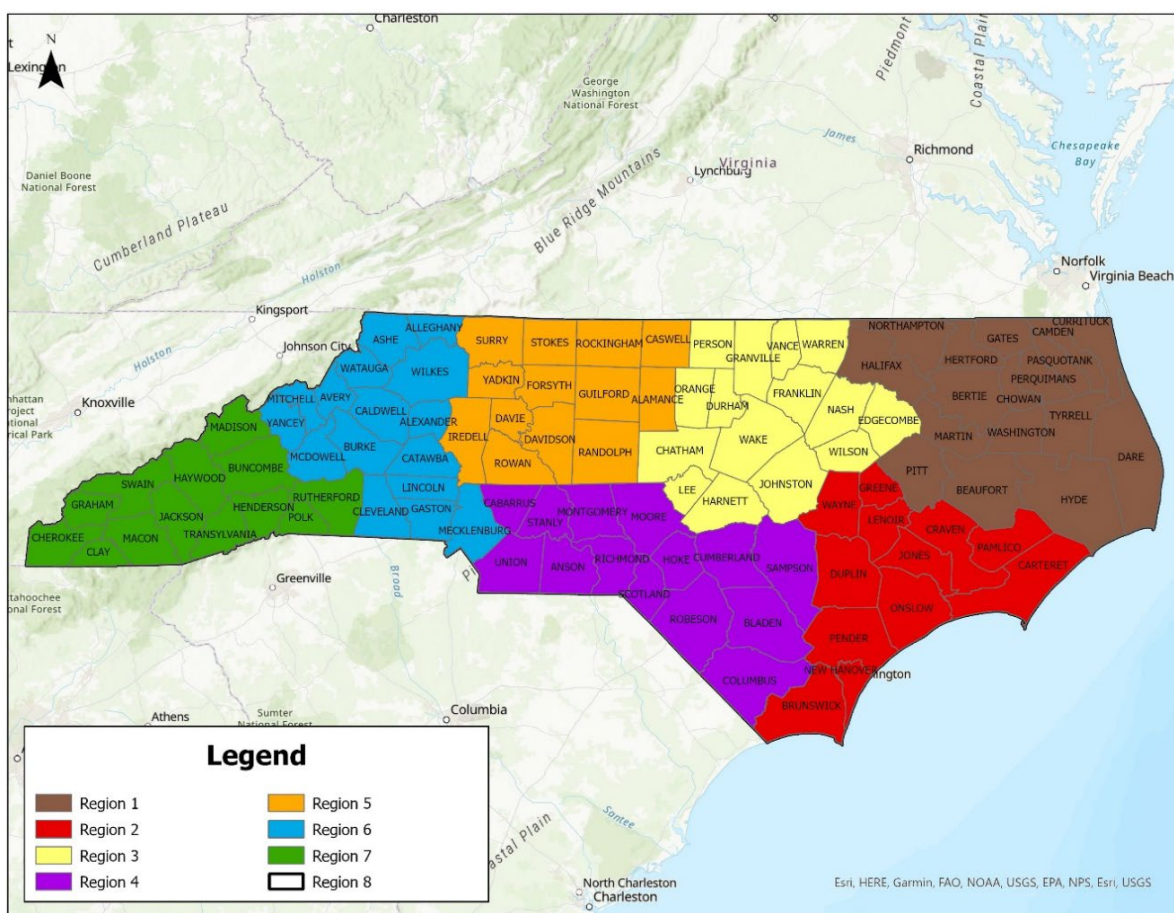


Figure 1. Map of North Carolina color coded by single family weatherization regions. Each region will house a collaborative hub that oversees weatherization and home upgrade services for eligible NC residents. Region 8 encompasses the entire state and is specifically for weatherization of multifamily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

III. Statement of Need

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

The purpose of WAP is to increase the energy efficiency of dwellings owned or occupied by low-income persons or to provide such persons with renewable energy systems or technologies, reduced total residential expenditures, and improve their health and safety, especially low-income persons who are particularly vulnerable such as the elderly, persons with disabilities, families with children, high residential energy users, and households with high energy burden. NC DEQ aims to identify weatherization agencies that are equipped to weatherize single family units within a region of North Carolina (Regions 1-7, Figure 1) using a collaborative approach. Participating agencies will receive free training in the collaborative model approach.

WAP intends to select the most qualified service provider (one award per region) for a contract through June 30, 2029, without extensions or renewals. The service provider selected for a given region shall be required to service the entire region equitably and shall not discriminate, though it may propose to subcontract other weatherization agencies to conduct weatherization activities in certain parts of the region. When no waitlist is present, properties are to be assisted on a first come, first served basis.

IV. RFP Timeline

RFP activity	Time and Date
RFP Posted	Friday, December 5, 2025
RFP Questions by Service Providers Due	5:00 pm Friday, December 12, 2025
RFP Answers Posted by NC DEQ	No later than Friday, December 19, 2025
RFP Due	5:00 pm Friday, January 23, 2026

V. Funding Source

The Infrastructure Investment and Jobs Act (IIJA), formerly known as the Bipartisan Infrastructure Law (BIL), was enacted on November 15, 2021, with the Department of Energy (DOE) releasing specific guidance for NC WAP agencies under Weatherization Program Notice 22-1 on March 30, 2022. Financial stimulus from the IIJA will build on the historic strength of the NC WAP by elevating funding through June 2029. Federal IIJA funding aligns with the North Carolina Clean Energy Plan (CEP) and will be utilized to help achieve the state's energy reduction goals of (1) decreasing electric power sector greenhouse gas emissions and (2) attaining carbon neutrality by 2050.

The NC WAP will distribute \$89,776,045 of IIJA funds for the purpose of enhancing energy efficiency in the homes of low-income families, particularly those in DACs, throughout all 100 counties of North Carolina. WAP energy upgrades provide homeowners relief through energy savings and home improvements that support equitable health and safety for North Carolinians. WAP anticipates that the ~\$89.7M IIJA stimulus will aid 5,945 households across the state. \$69.783M has been reserved for direct weatherization services (Table 1) across the State. Releasing the funds is based on evaluation of project performance, project schedule adherence, the extent milestone objectives are met, compliance with reporting requirements and overall contribution to the program goals and objectives.

As a result of this evaluation, DOE may, at its discretion, authorize the following actions: (1) continue to fund the project, contingent upon the availability of funds appropriated by Congress



for the purpose of this program and the availability of future-year budget authority; (2) place a hold on federal funding for the project, pending further supporting data or funding; or (3) discontinue funding the project because of insufficient progress, change in strategic direction, or lack of funding.

Table 1. Total Funding Distribution for Direct Weatherization Services by Open NC Region²

Region	Program Operations	Admin	Health & Safety	Total 5-year Allocation	Anticipated Number of Weatherized Units	Status
2	\$3,655,809	\$488,010	\$913,952	\$5,057,771	431	Open
3	\$7,739,504	\$1,033,139	\$1,934,876	\$10,707,519	912	Open
4	\$3,913,039	\$522,348	\$978,260	\$5,413,647	461	Open

Applicants interested in more than one region must submit a separate application for each region, tailoring their response to each region.

VI. Contractor Qualifications

To qualify for implementation of contract activities Service Provider(s) must:

1. Be a Community Action Agency (CAA) or other public or nonprofit entity.
2. Have detailed knowledge of, and experience in, weatherization services, including performance of energy efficiency retrofits.
3. Be familiar with the NC WAP and have relations with weatherization related agencies in the state.
4. Be familiar with methods for blending federal, state, and local funding opportunities in weatherization.
5. Demonstrate the ability to complete projects and serve all residents within the applicable region.

VII. Key Weatherization Focus Areas

WAP is working on addressing capacity building within the subgrantee network to expand services within the regions where weatherization services are most needed. To that end, WAP created three focus areas to bolster efforts in the IJA Program. Successful applicants will incorporate strategies in their answers to collaborate with the selected provider in the following three focus areas:

- 1) Focus Area 1 – Weatherization Collaborative Lead Agency
- 2) Focus Area 2 – Upgrades to Weatherization Training Program
- 3) Focus Area 3 – Weatherization Workforce Development Program

More information about the three focus areas may be found in Section 1.06 of the “*State of North Carolina Bipartisan Infrastructure Law Weatherization Assistance Plan*” that is housed on the NC WAP webpage: <https://www.deq.nc.gov/energy-climate/state-energy-office/weatherization->

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 \(SI702\)](#), 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).



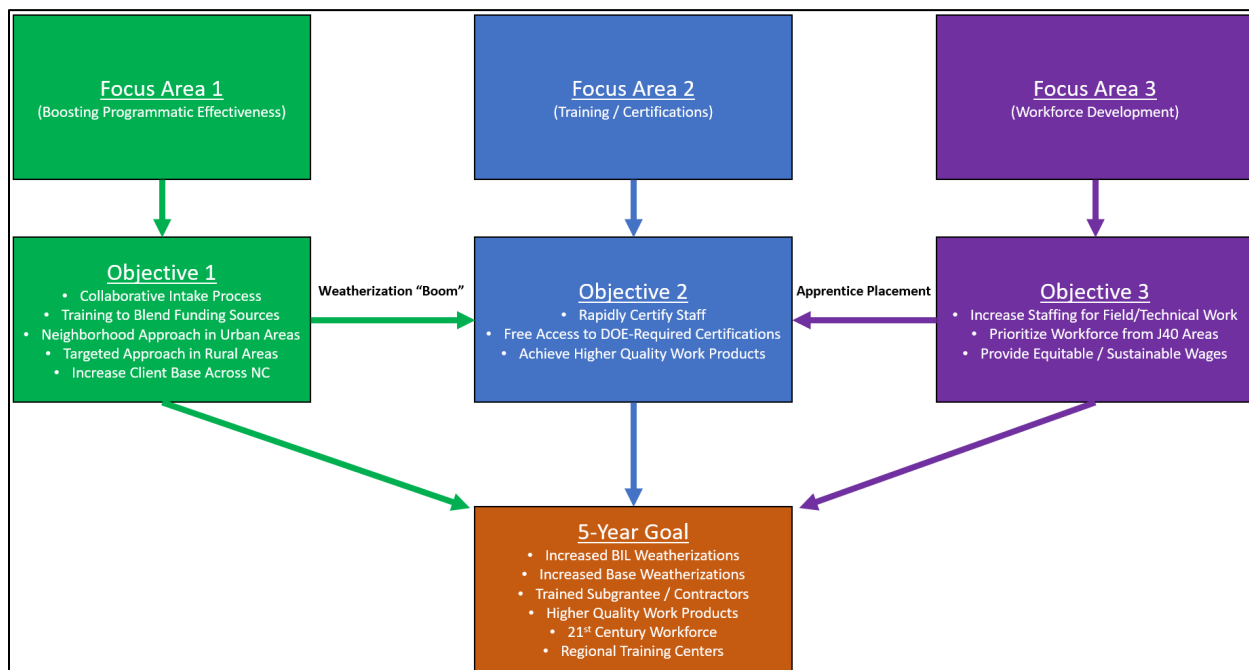


Figure 2. North Carolina’s training and technical assistance approach for the IIJA program.

VIII. Proposal Guidelines and Requirements

To make certain proposed projects meet the criteria above, eligible applicants will be expected to provide, at minimum, the following information concerning the anticipated single family weatherization services:

- Agency name(s), address(es), and technical lead(s).
- A description of the agency’s experience and preparedness to implement weatherization services across North Carolina.
- A description of recruitment strategies that will be utilized to identify single family units to weatherize throughout the state. How are units within disadvantaged communities and households with elderly, disabled, young children, high energy burden, and high energy users recruited? A specific plan should be developed for methods to reduce weatherization deferrals in the State. Note: approximately 50% of income-eligible clients in North Carolina are deferred due to items such as general health/safety concerns, disrepair of mechanical or electrical systems, structural deficiencies, and severe mold/moisture problems.
- A description of how your agency retains and advances a modern workforce in weatherization. Include how your agency will build upon these efforts.
- A list of proposed weatherization contractors or related agency partners. Please describe how your organization and your partners will work together to deliver the weatherization results targeted per county (refer to RFP attachment ‘County Allocations’) and for the sum of the applicable region.
- A list of metrics that will be collected for persons in single family units to be weatherized,

including methods for keeping private and personal information safe.

- Regular reporting on objectives metrics, project progress, and any project setbacks encountered.
- A detailed workforce development plan describing how this project will support equitable job opportunities, training within the energy sector, and a commitment to jobs with living wages and benefits that aligns with the former Justice40 initiative. (Please note that participating in an apprentice program and placing apprentices within their organization will likely be a requirement under IIJA funding.)
- Identify 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 DOE. At these Go/No-Go milestones, NC DEQ will evaluate project performance, schedule adherence, and contribution to the WAP goals and objectives.
- A budget in the template below, accompanied by a budget narrative explaining key assumptions, including the applicable indirect rate and formula used to calculate indirect costs.

Region 2:

Category	Program Operations	Administration	Health & Safety	Row Total	Weatherization Production
Personnel					
Fringe					
Travel					
Equipment					
Supplies					
Contract					
Other Direct Costs					
Total Direct Costs					
Indirect Costs					
Total Costs	\$3,655,809	\$488,010	\$913,952	\$5,057,771	431

Region 3:

Category	Program Operations	Administration	Health & Safety	Row Total	Weatherization Production
Personnel					
Fringe					
Travel					
Equipment					
Supplies					
Contract					
Other Direct Costs					
Total Direct Costs					



Indirect Costs					
Total Costs	\$7,739,504	\$1,033,139	\$1,934,876	\$10,707,519	912

Region 4:

Category	Program Operations	Administration	Health & Safety	Row Total	Weatherization Production
Personnel					
Fringe					
Travel					
Equipment					
Supplies					
Contract					
Other Direct Costs					
Total Direct Costs					
Indirect Costs					
Total Costs	\$3,913,039	\$522,348	\$978,260	\$5,413,647	461

- A weatherization production schedule, using this table:

<u>Program Year Quarter</u>	<u>Production: Number of Units Weatherized</u>
Q4 (Apr 1 – Jun 30, 2026)	
<i>FY26 Subtotal</i>	
Q1 (Jul 1 - Sep 30, 2026)	
Q2 (Oct 1 – Dec 31, 2026)	
Q3 (Jan 1 – Mar 31, 2027)	
Q4 (Apr 1 – Jun 30, 2027)	
<i>FY27 Subtotal</i>	
Q1 (Jul 1 - Sep 30, 2027)	
Q2 (Oct 1 – Dec 31, 2027)	
Q3 (Jan 1 – Mar 31, 2028)	
Q4 (Apr 1 – Jun 30, 2028)	
<i>FY28 Subtotal</i>	
Q1 (Jul 1 - Sep 30, 2028)	
Q2 (Oct 1 – Dec 31, 2028)	
Q3 (Jan 1 – Mar 31, 2029)	
Q4 (Apr 1 – Jun 30, 2029)	
<i>FY29 Subtotal</i>	
<u>Period of Performance Total</u>	

Note: the Period of Performance Total should be 431 for Region 2, 912 for Region 3, and 461 for Region 4.

- Resumes of key personnel who will manage and deliver the single-family unit weatherization program.



- 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.

Successful applicants will incorporate strategies in their answers to collaborate with the provider of focus areas 1, 2, and 3.

IX. Unit Eligibility

A dwelling unit is eligible for weatherization assistance if it is occupied by a family unit that meets the income guidelines set forth within [Weatherization Program Notice \(WPN\) 25-3](#) and meets the building eligibility guidelines detailed in 10 CFR 440.22.

X. Energy Audit Tool and Workforce Resources

As defined in the policy, computer modeling audit is to be used for the following building types:

- a. Single-family dwellings up to 4-plexes, and
- b. Mobile homes

Energy Auditors and Quality Control Inspectors (*QCI*) will be required to have proper certification for (1) single-family dwellings up to 4-plexes; and (2) mobile homes. This includes training on energy auditing software titled, “Weatherization Assistant” (i.e., National Energy Audit Tool (NEAT); and Manufactured Home Energy Audit (MHEA)) and the Building Performance Institute (BPI) QCI certification.

Computer energy audits require a physical inspection of the home, specific diagnostic tests, and proper data input into the software program. An energy profile of the existing home is compared to a set of improvements recommended for installation. Each measure is then evaluated, and a report is generated with the cost-effectiveness of each measure listed by Savings to Investment Ratio (SIR) greater than 1.

Service Providers are required to have staff members certified in the use of residential energy modeling software. If a modeling analysis is completed by a non-certified user, it must be reviewed by a certified user.

DOE also supported the development of an optional priority list for single family and manufactured housing units in ‘Climate Region 2’ via [WPN 22-8](#). At the time of posting this RFP, the optional priority lists are not approved in North Carolina; however, WAP will be requesting approval for use in the IJA Program.

XI. Justice40 Initiative Guidelines

[Justice40](#) was a whole-of-government effort to ensure that Federal agencies work with states and local communities to deliver at least 40 percent of the overall benefits from Federal investments in climate and clean energy to DACs. Weatherization of single-family units should align with the former Justice40 Initiative.



XII. Declaration of Confidential Information

If a proposer deems that certain information required by this RFP is confidential, the proposer must label such information as CONFIDENTIAL prior to submission. The proposer must reference where the information labeled CONFIDENTIAL is located in the proposal. For each subsection so referenced, 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 (1) the prospective harm to the competitive position of the proposer that would result if the identified information were to be released and (2) the reasons why the information is legally exempt.

XIII. Questions about the RFP

Eligible service providers shall carefully review this RFP. Questions must be emailed to Program Manager Pablo Torres at pablo.torres@deq.nc.gov on or before 5:00 p.m. Eastern Standard Time, Friday, December 12, 2025 with the subject header “Questions regarding IJJA RFP for Regions 2/3/4”. NC DEQ will not respond to verbal questions. All questions received on time will be answered in writing no later than Friday, December 19, 2025. NC DEQ's written response will be posted to the DEQ WAP webpage (<https://www.deq.nc.gov/energy-climate/state-energy-office/weatherization-assistance-program>).

XIV. Submission Details

RFPs should be formatted to have 1-inch margins with 12 pt font. The agency name(s) and page number should appear on each page. Proposals must not exceed 15 pages, including the cover page. Appendices are not counted towards the page limit.

All proposals shall be received by 5:00 PM Eastern Standard Time, on Friday, January 23, 2026. Proposals should be submitted to Pablo Torres at pablo.torres@deq.nc.gov with the subject header “Submission of RFP Response for IJJA Region X” where X is 2, 3, or 4. Proposals shall be submitted in PDF format.

XV. Evaluation of Proposals

NC DEQ will evaluate submitted proposals using the criteria listed in the table below. Numerical scores will be provided to each proposal. NC DEQ will choose a favored contractor to begin contract negotiations, and may, failing to reach satisfactory terms, choose another service provider. Further, NC DEQ reserves the right to choose any contractor – regardless of score.

Evaluation Criteria	Points
Weatherization experience and preparedness	10
Recruitment strategies to identify single family units to be weatherized and plan to reduce deferrals	20
Approach to subcontracting and partnering to achieve targeted weatherization results	20
Workforce development plan	25
Metrics and keeping Personally Identifiable Information safe	7
Plan for reporting of project progress and setbacks	10



Identification of Go/No-Go milestones	8
Total Score	100

The budget, budget narrative, and weatherization production schedule are required to be included in the proposal but will not be scored.

By rule of the Code of Federal Regulations (CFR) [10 CFR § 440.15](#), preference is given to any CAA or other public or nonprofit entity which has, or is currently administering, an effective program under this part or under title II of the Economic Opportunity Act of 1964, with program effectiveness evaluated by consideration of factors including, but not necessarily limited to, the following:

- a. The extent to which the past or current program achieved or is achieving weatherization goals in a timely fashion;
- b. The quality of work performed by the subgrantee;
- c. The number, qualifications, and experience of the staff members of the subgrantee; and
- d. The ability of the subgrantee to secure volunteers, training participants, public service employment workers, and other Federal or State training programs.

XVI. Build America, Buy America

The Build America, Buy America (BABA) provisions of the IIJA Program establish a domestic content procurement preference for all federal financial assistance obligated for infrastructure projects after May 14, 2022. [Per Weatherization Assistance Program Memorandum 104](#), “*Only weatherization on public housing or privately owned buildings that serve a public function are required to comply with the BABA requirements.*”

[BABA requires](#) the following:

- a) Iron and Steel Products
 - All manufacturing processes must occur in the United States.
- b) Manufactured Products
 - All manufactured products must be produced in the United States; and
 - 55 percent or more of the total cost of components must be mined, produced, or manufactured in the United States.
- c) Construction Materials
 - All manufacturing processes must occur in the United States.

XVII. Reporting Requirements for Accepted Projects

Contingent on use of IIJA funding, any selected entities will be mandated to follow the most up-to-date 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 NC WAP regulations contained in 10 CFR 440, the Uniform Guidance at 2 CFR Part 200 as adopted by DOE at 2 CFR Part 910, and the Infrastructure Investment and Jobs Act, Public Law 117-58. This will include, but may not be limited to:

- The reporting and audit requirements of 2 CFR Part 200, including submission of an annual audit of weatherization funds conducted in accordance with 2 CFR Part 200, Subpart D &



F.

- Travel regulations that include travel authorization, reimbursement, advancements, and per diem rates that do not exceed the State of North Carolina's maximum amount.
- Funding requirements. Funds shall not be expended for the items or services other than those listed in 10 CFR 440.18. *Subgrantees must abide by the allowables guidance document provided by the NC DEQ State Energy Office*, included as an attachment to this RFP.
- Subgrantees shall comply with the Environmental Protection Agency (EPA) regulations as set forth in 40 CFR Part 247 - Guidelines for Procurement of Recovered Materials, which encourages the use of recyclable materials. Subgrantees shall use recyclable materials whenever possible. Compliance with EPA regulations also applies to the decommissioning of replaced baseload appliances whether subcontracted out or not.
- Adjusted Average Cost Per Dwelling Unit (ACPU): the NC ACPU expenditure of financial assistance provided under WAP for labor, weatherization materials, and related matters cannot exceed \$8,484, unless otherwise further revised based on DOE guidance. This average includes units computed in a multifamily building of 5 units or greater. $ACPU = [(DOE \text{ Program Operations funds}) \text{ minus } (DOE \text{ Health \& Safety expenditures})] \text{ divided by } [DOE \text{ completions}]$. Refer to 10 CFR §440.18 and [WPN IJA-7](#).

Weatherization Assistance Programmatic costs are on a reimbursement basis and must be submitted to NC DEQ within 30-days of receiving an invoice/receipt. To that end, each subgrantee must submit certified and timely reports to NC DEQ detailing the progress made towards the program objective(s) and all administrative and program expenditures. The report must agree with the subgrantee's accounting records, client database, and be certified by the subgrantee's Chief Executive Officer (CEO) / Executive Director (ED) and the Finance Director via handwritten or certified electronic signature. Timely reimbursements are based on the "Monthly Billing Submittal Calendar" provided by NC DEQ.

- a) Required reporting documents for a complete monthly billing package include:
- **Invoice** [using provided IJA template]
 - Each Subgrantee should submit one invoice each month on our templates for total costs by contractual budget line item (i.e. personnel, fringe, travel, equipment, etc.) and budget category (Program Operations, Health and Safety, and Administration). This template is not intended to affect the subgrantee's internal invoicing systems.
 - The official document should be a PDF signed and dated by the CEO/ED and Finance Director.
 - **Project Expense Summary** [using provided IJA template]
 - Should include an inventory of all expenses from the point of sale that quantify the totals listed on the NC WAP's invoice.
 - **Payroll Report** [Subgrantee provides]
 - To ensure NC DEQ is able to quantify the total amounts billed for payroll items by contractual budget line item and budget categories, subgrantees are required to provide one of the following options:
 - Payroll Report & Summary Option 1



- i. Subgrantee provides a monthly export from their timekeeping system to validate subgrantee staff time charged by budget category (Program Operations, Health & Safety, Administration). Time can be logged using outputs from tools such as:
 - i. Third-Party Timekeeping Software
 - ii. Payroll Report/System
- ii. Subgrantee provides a simple summary table/attachment to the “Payroll Report” to assist with the quantification (i.e., highlighting or clearly identifying the charges being made to NC WAP). An acceptable summary that would be an attachment to the Payroll Report is below:

Payroll Summary Report – [Subgrantee Name]		
Billing Period – [Month XXXX – Month XXXX]		
Budget Category	Description	Value
Program Ops	Salary + Fringe	\$XXX
Administration	Indirect Costs	\$XXX
Health and Safety	Equipment	\$XXX

- **Payroll Report & Summary Option 2:**

Subgrantee provides a Payroll Report that is a combination of detailing staff time and the amount charged by budget category. An acceptable summary would be:

Payroll Summary Report – [Subgrantee Name]					
Billing Period – [Month XXXX – Month XXXX]					
Program	Budget Category	Employee Name	Hours	Rate	Total
IIJA	Program Operations	James Blue	15	\$26.30	\$394.50
IIJA	Administration	Barbara Green	8	\$25.40	\$203.20

The Subgrantee’s Payroll Report/Summary will need to be signed and dated by the CEO/ED and Finance Director.

- **Official Invoices/Receipts and Supporting Documentation**
 - *The subgrantee is required to provide original source documents from the point of sale (i.e., invoices/receipts) along with proof of payment for any charge at or over \$50.00 to NC DEQ as listed in the Project Expense Summary within 30-days of receipt. Subrecipients are still required to maintain documentation for every expense invoiced to NC DEQ for reimbursement.*
- b) Reporting Format – DEQ has provided all Subgrantees with online access to software (i.e., ShareFile and/or client database) for the purpose of reporting weatherization activities. All weatherization Subgrantees are required to use program software for reporting purposes.
- c) Additional Guidance – NC DEQ shall provide all Subgrantees with access to training videos concerning the billing submittal process. In the instance Subgrantees need additional guidance, NC DEQ will provide case-by-case virtual training to discuss the billing process



upon request.

Expenses will only be reimbursed by providing all items as described above on a monthly basis. Upon review of the Subgrantee submittal, NC DEQ will communicate any needed revisions, clarifications, and associated due date(s) for resubmittals. Subgrantees must review, clarify, revise, and/or submit all items needed to correct the incomplete billing package within the due date(s) listed in the email.

Please note that any clarifying updates will be sent from the NC DEQ State Energy Office.

XVIII. Evaluation Process and Scoring – Single Family

Each application will be assessed to the degree in which applications meet the following evaluation criteria:

- (1) Applicant’s experience and preparedness to implement weatherization services across the state of North Carolina,
- (2) Recruitment strategies to identify single family unit to be weatherized, specifically how will units within disadvantaged communities (DACs) and households with at risk population be recruited and a plan to reduce weatherization deferrals,
- (3) Retention and advancement of a modern workforce in weatherization and how the plan aligns with the former Justice 40 Initiative,
- (4) Approach to subcontracting and partnering to achieve the weatherization results targeted by county and for the sum of the applicable region,
- (5) Metrics collected for persons in single family homes and methods for keeping private and personal information safe,
- (6) The plan for reporting project progress and any project setbacks, and,
- (7) Identification of Go/No-Go milestones in the project.

Each criterion will be scored using the options provided in **Table 1-1** by a panel. The application’s final qualitative score for each criterion will be calculated by averaging the qualitative scores from each panelist.

Please note that answering every question, while informative, will not necessarily guarantee an “Exceeds” score. Finally, prompts included here are by no means mutually exclusive or exhaustive; any additional information to support the merit of the application is welcome.

Table 1-1: Criteria Scoring Options

Scoring Option	Description
Not at all	The application does not address the criterion at all.
Minimally	The application addresses the criterion, but information in the application may be confusing, unclear, and/or incorrect. The degree to which the application



	demonstrates the criterion is minimal, and references to the criterion do not include substantive information.
Partially	The application partially addresses the criterion, but the application may lack clarity and/or strong support, have some minor inconsistencies, or not address all components of the criterion. The degree to which the application demonstrates the criterion has been met is mediocre.
Mostly	Although the application may include a few minor inconsistencies or areas that need more clarity, there is strong support for most components of the criterion. The degree to which the application demonstrates the criterion has been met is acceptable.
Entirely	The application is clear, concise, and complete; provides examples; and is supported by data. It addresses all components of the criterion and may have a particularly compelling narrative. The degree to which the application demonstrates the criterion has been met is excellent.
Exceeds	In addition to addressing all components of the criterion, being clear, concise, complete, and supported by data, the application articulates the impact of the project in catalyzing broader efforts (such as project type awareness) as they relate to the criterion. The degree to which the application demonstrates the criterion has been met is beyond excellent.

The NC DEQ will apply the scoring options listed in **Table 1-1** to all seven qualitative criteria. Note that point values vary among each criterion. The graded scoring and point scales for each criterion are included later in this document.

Tip: If you cite an attachment within the application, include the attachment name and location within the description and/or narrative, and be sure to implement proper naming conventions and ensure all attachments are relevant.

To achieve maximum points, applicants are encouraged to delineate clearly and completely the following:

- Implementation measures;
- Population impacted;
- Community engagement and other outreach activities;
- Leveraging subcontractors and partners; and
- Strategies to collaborate with the provider of focus areas 1, 2, and 3.

Evaluation Criterion 1: Applicant's experience and preparedness to implement weatherization services across the state of North Carolina (10 possible points)

The score received for Criterion 1 will depend upon how well the application details the following elements: (1) the organization's experience, (2) knowledge of rules and regulations of weatherization services, (3) the organization's proficiency with utilizing the United States Department of Energy (*DOE*) approved energy audit tools (i.e., Weatherization Assistant [NEAT / MHEA]), and (4) the degree to which applicants' program(s) have been successful in producing desired results in weatherization services.



Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	2	4	6	8	10

Evaluation Criterion 2: A detailed plan to address weatherization deferrals; Recruitment strategies to identify single family units to be weatherized, specifically how will units within disadvantaged communities and households with at risk populations be recruited (20 possible points)

The score received for Criterion 2 will depend upon how well the application details how the project will: (1) address weatherization deferrals, and (2) reach DACs.

Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	4	8	12	16	20

Evaluation Criterion 3: Approach to subcontracting and partnering to achieve the weatherization results targeted by county and for the sum of the applicable region (20 possible points)

Leveraging subcontractors and partners allows applicants to access complementary strengths from neighboring communities, states, the federal government, and non-profit and private partners. This potentially helps the applicant from a cost basis and serves the local community's greater good.

The score received for Criterion 3 will depend upon how well the application incorporates: (1) subcontractors and partners (e.g., state, territory, Tribal, private, district, local community) that will ensure the applicant meets community needs and targeted results, (2) an explanation of how these subcontracts and partnerships benefit DACs, (3) timeline(s) for implementation; and (4) an explanation on the anticipated outcome of those subcontracts and partnerships (e.g., leveraging resources such as financial, material, and educational resources; coordinating multi-jurisdictional projects; heightened focus on equity related issues).

A DAC may be characterized by variables including, but not limited to: low income, high and/or persistent poverty, high unemployment and underemployment, high housing cost burden and substandard housing, distressed neighborhoods, disproportionate environmental burden and high cumulative impacts, disproportionate climate impacts, high energy cost burden and low energy access, and all geographic areas within Tribal jurisdictions.

If a population impacted as demonstrated by the application does not include a DAC, then the highest point allotment available is Partially. Application(s) that clearly state the proposed project is benefiting a DAC can score Mostly or Higher.

Additional considerations for completing the application:

- What entities were involved in the project design? How did they contribute to the application? What entities will contribute to the implementation of the project? In what capacity?



- To what extent were non-governmental organizations, including those organizations that represent disadvantaged groups, universities, or other government entities consulted for advice or assistance? How has collaboration with surrounding jurisdictions supported project development?
- To what extent have other programs or funding sources been leveraged for the project?
- What community groups will participate in this project? What potential exists for partnerships to continue beyond implementation of the project?

Tip: NC DEQ recommends clearly describing disadvantaged communities within the narrative.

Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	4	8	12	16	20

Evaluation Criterion 4: Retention and advancement of a modern workforce in weatherization and how the plan aligns with the former Justice40 Initiative (25 possible points)

The score received for Criterion 4 will depend upon how well the application describes: (1) how the organization’s existing employees will be retained, trained, and have opportunities for advancement (a career advancement plan), (2) a detailed plan to support jobs with living wages and benefits that align with the former J40 Initiative.

- Are strong labor standards incorporated? For example, the use of project labor agreements (PLAs), requiring workers to be paid wages at or above the prevailing rate; use of local hire provisions; using a directly employed workforce (as opposed to a subcontracted workforce); and use of an appropriately skilled and credentialed workforce.

Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	5	10	15	20	25

Evaluation Criterion 5: Metrics collected for persons in single family and mobile homes and methods for keeping personally identifiable information safe (7 possible points)

The score received for Criterion 5 will depend upon how well the application describes: (1) what and how information is collected on people in the household based on the “*State of North Carolina Bipartisan Infrastructure Law Weatherization Assistance Plan*” that is housed on the NC DEQ WAP webpage: <https://www.deq.nc.gov/energy-climate/state-energy-office/weatherization-assistance-program>, and (2) the policies and procedures for keeping personally identifiable information safe.

Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	1.4	2.8	4.2	5.6	7



Evaluation Criterion 6: The plan for reporting project progress and any project setbacks (10 possible points)

The score received for Criterion 6 will depend upon how well the application: (1) provides the plan for their reporting and project progress timelines, (2) articulates project process and setbacks, and (3) contains contingency plans for how to handle project setbacks.

Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	2	4	6	8	10

Evaluation Criterion 7: Identification of Go/No-Go milestones in the project (8 possible points)

The score received for Criterion 7 will depend upon how well the application: (1) articulates a milestone plan complete with detailed timeline; (2) supports the project's feasibility within the allotted timeframe; and (3) contains resources to implement the project plan.

Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	1.6	3.2	4.8	6.4	8

