

North Carolina Department of Environmental Quality
State Energy Office
Weatherization Assistance Program
5 Yr. Bipartisan Infrastructure Law (BIL)
Request for Proposal (RFP)
Weatherization Workforce Development Program
Up to \$5.08M

RFP release date: 4/25/24

RFP deadline to respond: 5/6/24

ALL VENDORS:

The enclosed packet contains a "REQUEST FOR PROPOSAL" for a Weatherization Workforce Development Program. **This approach is being utilized for the 5 Yr. BIL funds only. This solicitation model does not affect the annual appropriations, the annual Weatherization program design, or the annual funding allocated to the agencies supporting that program.** This approach will allow BIL funds to be expended efficiently, serving more residents, and increasing workforce opportunities within the local communities.

The proposal consists of the following documents:

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I. Summary

The State Energy Office (SEO) office at the North Carolina Department of Environmental Quality (NC DEQ) is committed to ensuring affordable, just, and equitable access to energy. Through the Weatherization Program (WAP), NC DEQ works to assist low-to-medium income (LMI) residents in NC (income of $\leq 200\%$ federal poverty level) with energy efficiency upgrades to reduce their energy burden and improve home living conditions. To boost WAP outcomes, SEO is working to build a more sustainable WAP workforce, innovate the existing WAP program, and surge the number of homes served. The SEO believes that providing on-the-job weatherization (Wx) training for high school, college, and displaced workers will retain a skilled workforce to increase WAP progress while simultaneously providing equitable job opportunities in clean energy. NC DEQ aims to fund a Weatherization Workforce Development Training Program (or programs) that are equipped to train pre/apprentices in skills related to weatherization. Workforce development and apprenticeship programs would increase the number of skilled workers in clean energy, and ideally retain workers for weatherization services in NC. Ultimately, this program will provide equitable opportunities for on-the-job training in weatherization and provide participants with job opportunities after the program's conclusion. The Wx workforce development goals align with the North Carolina Clean Energy Plan (CEP), which aims to ensure a just and equitable transition to the clean energy economy, providing job opportunities for disadvantaged and underserved persons and supporting Justice40 Initiatives.

II. Background

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. The Weatherization Assistance Program (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.

North Carolina is committed to equitable workforce expansion, transitioning to a clean energy economy, reducing the energy burden for low-income households, and enhancing the resilience of the electric grid. While transitioning, the State will focus on efforts that will attract, train, and retain the appropriately skilled workforce while concurrently funneling workers to local Wx agencies to rapidly increase the number of completed units by 2027. As part of the workforce development program, North Carolina will continue to create long-term jobs in the weatherization industry with family-sustaining wages and benefits for low-income communities and displaced workers as recommended in the NC CEP.

III. Statement of Need

NC DEQ aims to fund a Weatherization Workforce Development Training Program (or programs) that are equipped to train pre/apprentices in skills related to weatherization. For each workforce

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development program funded, SEO envisions hiring a single entity that would lead the Wx coalition of universities, community colleges, state agencies and educational non-profits. The program should utilize local hiring agreements to attract, train, and retain an appropriately skilled workforce through Wx training on-the-job and plan to educate participants through related courses on clean energy and energy efficiency occupations. To align with Justice 40 initiatives, the program should focus on selecting trainees that are underrepresented and historically excluded.

Funding for the Wx workforce development program is available throughout the state by June 2027.

IV. RFP Timeline

RFP activity	Time and Date
RFP posted	4/29/24
RFP questions by bidders due	4/29/24
RFP answers posted by NC DEQ	5/2/24
RFP due	5/6/24
Awards Selected	5/17/24

V. Funding Source

The Bipartisan Infrastructure Law (BIL) was enacted on November 15, 2021, with the U.S. Department of Energy (DOE) releasing specific guidance for 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. Federal BIL funding aligns with the North Carolina CEP and will be utilized to help achieve the State’s energy reduction goals of decreasing electric power sector greenhouse gas emissions by 70% below 2005 levels by 2030 and of attaining carbon neutrality by 2050. Furthermore, in 2021, North Carolina enacted House Bill 951, which emphasizes its commitment to reduce carbon dioxide emissions in the electric power sector based on key goals presented in the CEP.

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.

Up to \$15.68 million has been retained for Training and Technical Assistance over the five-year grant contract period. These funds will be directed towards a workforce development program that will include an apprentice component and significant capacity building for our existing network of subgrantees to successfully expand their capabilities. Specifically, up to \$5.08M is available to support Wx workforce development programs.

It is important to note that NCSEO WAP 5 Yr. BIL funds will follow the U.S. DOE the March 2022 [Administrative and Legal Requirement Document](#) (ALRD) PERIOD OF PERFORMANCE

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guidance. The \$5.08M will not be released as a one lump sum. Releasing the funds are 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/SEO WAP 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.

VI. Contractor Qualifications

Minimal Bidder(s) qualifications required for implementation of contract activities include:

1. The Bidder(s) shall have detailed knowledge of, and experience in, training related to weatherization and/or clean energy.
2. The Bidder(s) shall be familiar with the North Carolina WAP and have relations with Wx related agencies in the state.
3. The Bidder(s) should follow Justice40 initiative guidelines by creating equitable job training for underserved and disadvantaged persons and communities.
4. The Bidder(s) should demonstrate an ability to leverage partnerships to provide equitable and sustainable wages for those participating in the program.

VII. 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 proposed Wx Workforce program:

- Agency name(s), address(es), and technical lead(s).
- A description of the agency's experience and preparedness to implement training and placement of pre/apprentices.
- A description of recruitment strategies that will be utilized to find pre/apprentices as well as participating Wx related agencies to participate in the program.
- A description of the proposed training and materials for pre/apprentices, including the people who will be implementing the training as well as training locations and formats (i.e., in person, virtual, hybrid, etc.).
- A list of weatherization (or related) agency partners that are interested in accepting pre/apprentices for the program. If possible, the estimated number of pre/apprentices that each agency will accept should be provided. Please include how pre/apprentices will be matched with different agencies.

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- A plan to engage partners in the apprenticeship program, so that employers agree to pay apprentices \$30/hour with a 50% cost share with Apprenticeship NC. (Follow section 1.06 of the State of North Carolina BIL State Plan.)
- A proposed timeline for pre/apprenticeship training and methods of engagement with local agencies.
- A plan describing how the leads of the workforce development program will field and answer questions from pre/apprentices and/or adjust pre/apprenticeship placement if agencies are not fulfilling their due diligence in on-the-job training.
- A community benefits analysis, describing how the proposed training program will justly and equitably provide weatherization job opportunities for underserved and/or disadvantaged persons.
- A description of how weatherization agencies will be evaluated on their performance and training with pre/apprentices. Evaluations should include a mid-way review in the training program to ensure both the pre/apprentice and agency are meeting the expected program requirements.
- A list of metrics that will be collected by the lead workforce program and participating agencies that indicate success of weatherization training.
- Regular reporting on objectives metrics, project progress, and any project setbacks (with root cause analysis) encountered.
- A detailed workforce development plan describing how this project will support equitable job opportunities, an increase in the diversity of hired employees, training within the energy sector, and a commitment to jobs with living wages and benefits that aligns with the Justice40 initiative.
- Identify at least two 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.
- A detailed budget, including a line item for pre/apprentice wages and any fringe benefits.
- Resumes of those who will organize the program and lead relevant training sessions for the workforce program.

VIII. Justice40 Initiative Guidelines

Justice40 is 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. For additional information, see Weatherization Program Notice BIL 22-1 11 Executive Order 14008, Federal Register: Tackling the Climate Crisis at Home, and the Office of Management and Budget (OMB) Memorandum 21-28.

The workforce development project should follow Justice40 initiative guidelines by creating equitable job training for underserved and disadvantaged persons and communities.

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IX. 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 FOIA. 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.

X. Questions about the RFP

Eligible Bidders shall carefully review this RFP. Questions must be directed to Matthew Davis via the [question portal](#) on or before Noon Eastern Standard Time, 4/29/24

NC DEQ will not respond to verbal questions. All questions received by Noon Eastern Standard Time, 4/29/24 will be answered in writing; NC DEQs written response will be posted to the DEQ WAP webpage

(<https://www.deq.nc.gov/energy-climate/state-energy-office/weatherization-assistance-program>) by 5:00 p.m. 5/2/24

XI. 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. SEO recommends that proposals do not exceed 15 pages. Any example training material may be provided as appendices.

All proposals shall be received by 10:00 AM Eastern Standard Time, 5/6/24 Proposals may be submitted through [the application portal](#).

Proposals shall be submitted in PDF format.

XII. Evaluation of Proposals

NC DEQ’s SEO will evaluate submitted proposals using the criteria listed in the table below. Numerical scores will be provided to each proposal. Applicants will be notified of committee decisions on 5/17/24 Eastern Standard Time. NC DEQ will choose a favored contractor to begin contract negotiations, and may, failing to reach satisfactory terms, choose another bidder. Further, NC DEQ reserves the right to choose any contractor – regardless of score.

Evaluation Criteria	Points
Educational/Training Experience	10
Proposed training materials and methods	30
Weatherization agency engagement plan	15

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Community Benefits Analysis	15
Metrics for Reporting	15
Budget	15
Total Score	100

XIII. Announcement of Award Recipients

Applicants will be notified of their proposal funding status by e-mail on 5/17/24 by 5:00 p.m. Eastern Standard Time.

XIV. Reporting Requirements for Accepted Projects

Contingent on use of BIL funding, any selected entities will be mandated to follow U.S. DOE’s and NC WAP’s program and reporting requirements. 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.
- 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 regulations. The T&TA funds received for this project cannot be used to purchase equipment used in the day-to-day installation of weatherization measures.
- The Build America, Buy America provisions of the BIL (BABA).
- 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”.
- 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.

Each Subgrantee shall submit certified and timely reports to 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 or their designee via handwritten or certified electronic signature.

- a) At a minimum, the required reporting documents for a complete monthly billing package follows the reporting requirements in 5 Yr. BIL WAP Section 2.16.
- b) Reporting Format – DEQ will provide all Subgrantees with online access to software for the purpose of reporting weatherization-related activities. Subgrantees are required to use designated program software for reporting purposes.

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- c) NC WAP cannot approve an incomplete billing package. Expenses will not be reimbursed without providing items listed above in 14(a) and (b) on a monthly basis (*regardless of whether expenses were made*).

XV. Evaluation Criteria

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

1. Educational/Training Experience

Applicant's experience and preparedness to implement training and placement of pre/apprentices. A description of recruitment strategies that will be utilized to find pre/apprentices as well as participating Wx related agencies to participate in the program across the state of North Carolina.

2. Proposed Training Materials and Methods

A description of the proposed training and materials for pre/apprentices, including the people who will be implementing the training as well as training locations and formats (i.e., in person, virtual, hybrid, etc.).

A list of weatherization (or related) agency partners that are interested in accepting pre/apprentices for the program. If possible, the estimated number of pre/apprentices that each agency will accept should be provided. Please include how pre/apprentices will be matched with different agencies.

A proposed timeline for pre/apprenticeship training and methods of engagement with local agencies.

A plan describing how the leads of the workforce development program will field and answer questions from pre/apprentices and/or adjust pre/apprenticeship placement if agencies are not fulfilling their due diligence in on-the-job training.

3. Weatherization Agency Engagement Plan

Training should include methodology for collaborative outreach, management of accessible and coordinated care information, and design of cooperative case management models.

A description of how weatherization agencies will be evaluated on their performance and training with pre/apprentices. Evaluations should include a mid-way review in the training program to ensure both the pre/apprentice and agency are meeting the expected program requirements.

A list of metrics that will be collected by the lead workforce program and participating agencies that indicate success of weatherization training.

4. Community Benefits Analysis

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A community benefits analysis, describing how the proposed training program will justly and equitably provide weatherization job opportunities for underserved and/or disadvantaged persons.

A detailed workforce development plan describing how this project will support equitable job opportunities, an increase in the diversity of hired employees, training within the energy sector, and a commitment to jobs with living wages and benefits that aligns with the Justice40 initiative.

5. Metrics for Reporting

A list of metrics that will be collected by the lead workforce program and participating agencies that indicate success of weatherization training.

Regular reporting on objectives metrics, project progress, and any project setbacks (with root cause analysis) encountered.

The plan reporting project progress and any project setbacks, and,

Identification of Go/No-Go milestones in the project.

6. Budget

A detailed budget, including a line item for pre/apprentice wages and any fringe benefits. The budget should reflect \$30/hour apprentice wage with a 50% cost share with Apprenticeship NC. (Follow section 1.06 of the State of North Carolina BIL State Plan.)

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 Partners

Evaluation Criterion 1: Educational/Training Experience (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 and preparedness to implement training and placement of pre/apprentices. (2) A description of recruitment strategies that will be utilized to find pre/apprentices as well as working with Wx related agencies to participate in the program across the state of North Carolina, and (3) the degree to which applicants' program(s) have been successful in producing desired results in placing apprentices in weatherization services.

Evaluation Criterion 2: Proposed Training Materials and Methods (30 possible points)

The score received for Criterion 2 will depend upon how well the application details how the project will: (1) A description of the proposed training and materials for pre/apprentices, including the people who will be implementing the training as well as training locations and formats (i.e., in person, virtual, hybrid, etc.).

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- (2) A list of weatherization (or related) agency partners that are interested in accepting pre/apprentices for the program. If possible, the estimated number of pre/apprentices that each agency will accept should be provided. Please include how pre/apprentices will be matched with different agencies.
- (3) A proposed timeline for pre/apprenticeship training and methods of engagement with local agencies.
- (4) A plan describing how the leads of the workforce development program will field and answer questions from pre/apprentices and/or adjust pre/apprenticeship placement if agencies are not fulfilling their due diligence in on-the-job training and,
- (5) A plan describing how the leads of the workforce development program will field and answer questions from pre/apprentices and/or adjust pre/apprenticeship placement if agencies are not fulfilling their due diligence in on-the-job training.
 - If the application does not include a reference or incorporate any the Key Weatherization Focus Areas, then the highest point allotment available is Partially. Application(s) that clearly state the approach to collaborate with Focus Areas 1, 2 or 3 can the proposed project is benefiting a DAC can score Mostly or Higher

Evaluation Criterion 3: Weatherization Agency Engagement Plan (15 possible points)

The score received for Criterion 3 will depend upon how well the application incorporates: (1) methodology for collaborative outreach, management of accessible and coordinated care information, and design of cooperative case management models.

- (2) A description of how weatherization agencies will be evaluated on their performance and training with pre/apprentices. Evaluations should include a mid-way review in the training program to ensure both the pre/apprentice and agency are meeting the expected program requirements.
- (3) A list of metrics that will be collected by the lead workforce program and participating agencies that indicate success of weatherization training.

Evaluation Criterion 4: Community Benefits Analysis (15 possible points)

The score received for Criterion 4 will depend upon how well the application describes: (1) how the proposed training program will justly and equitably provide weatherization job opportunities for underserved and/or disadvantaged persons.

- (2) A detailed workforce development plan describing how this project will support equitable job opportunities, an increase in the diversity of hired employees, training within the energy sector, and a commitment to jobs with living wages and benefits that aligns with the Justice40 initiative.

A disadvantaged community may be characterized by variables including, but not limited to: low income, high and/or persistent poverty, high unemployment and

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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 partners were involved in the project design? How did partners contribute to the application? What partners will contribute to the implementation of the project? Partnerships can take many different forms. For example, partners may contribute financially, support and promote the proposed project, help generate community-wide awareness of the risks the proposal is designed to address, etc.
- 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 WAP recommends clearly describing disadvantaged communities within the narrative and uploading documentation relevant to disadvantaged communities outlined in the application.

Evaluation Criterion 5: Metrics for Reporting, (15 possible points)

The score received for Criterion 5 will depend upon how well the application describes: (1) A list of metrics that will be collected by the lead workforce program and participating agencies that indicate success of weatherization training.

- (2) Regular reporting on objectives metrics, project progress, and any project setbacks (with root cause analysis) encountered.
- (3) The plan reporting project progress and any project setbacks, and,
- (4) Identification of Go/No-Go milestones in the project.

Evaluation Criterion 6: Budget (15 possible points)

- The score received for Criterion 6 will depend upon how well the application: (1) A detailed budget, including a line item for pre/apprentice wages and any fringe benefits. The budget should reflect \$30/hour apprentice wage with a 50% cost share with Apprenticeship NC. (Follow section 1.06 of the State of North Carolina BIL State Plan.)