

NORTH CAROLINA
Environmental Quality

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North Carolina Department of Environmental Quality
State Energy Office
Weatherization Assistance Program
5 Yr. Bipartisan Infrastructure Law (BIL)
Request for Proposal (RFP)
Upgrades to Weatherization Training Program

RFP release date: 9:00 am Friday, June 30, 2023

RFP deadline to respond: 5:00 pm Friday, September 1, 2023

ALL VENDORS:

The enclosed packet contains a "REQUEST FOR PROPOSAL" for a Weatherization Training Program Lead Agency. **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:

REQUEST FOR PROPOSAL

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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 a clear avenue for sustained weatherization (Wx) training will generate a knowledgeable and sustainable weatherization workforce to improve WAP outcomes. NC DEQ aims to fund an agency to lead North Carolina's Weatherization Training Program who is equipped to track the Wx training requirements for participants and conduct both the required optional training courses. Advancements in Wx training would increase the effectiveness of the WAP by providing continuing education opportunities outside of the States' required training regimen. Providing optional training opportunities for Wx workers to advance their education and skills will likely increase retention and advancements in the field, as workers can choose to participate in training opportunities based on their needs and interests. Ultimately, this program will provide equitable opportunities for training in weatherization and strengthen the NC Wx network. The Wx workforce training goals align with the North Carolina Clean Energy Plan (CEP), which aims to ensure a just and equitable transition to the clean energy economy by building and sustaining jobs in energy related fields.

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. The SEO intends to focus on efforts that will attract, train, and retain the appropriately skilled Wx workforce while rapidly increasing the number of weatherized units in NC by 2027. The SEO aims to develop 7 regional Wx Collaborative Hubs throughout the state that will serve as a coalition and training hub for local agencies. We anticipate that Wx Hub collaborations will be based on the geographic jurisdictions of NC's weatherization service providers (**Figure 1**). SEO believes the regional Wx collaboratives will improve WAP success.



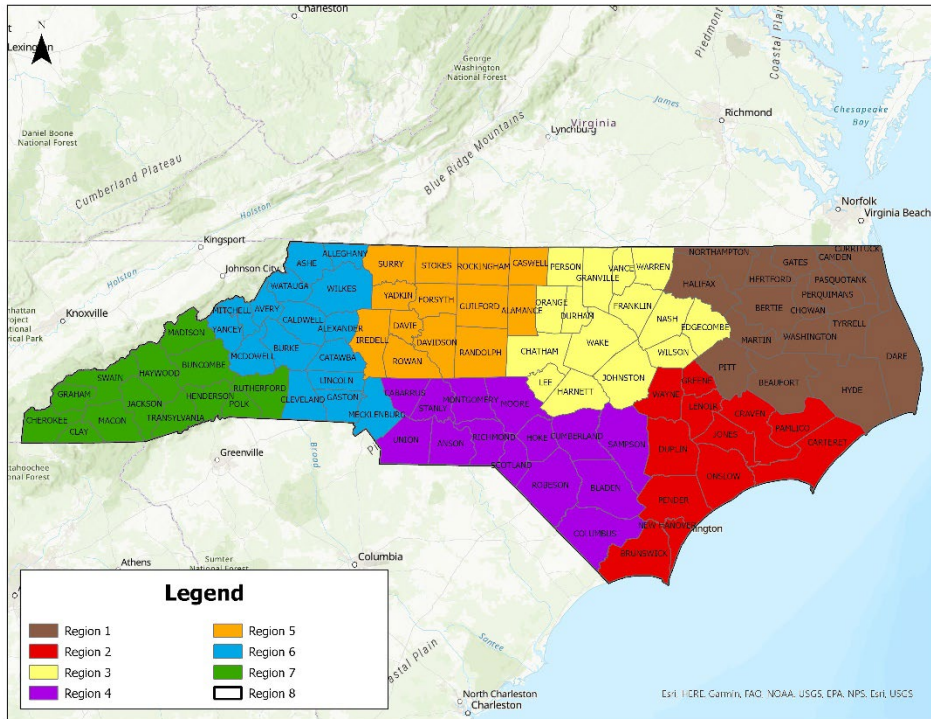


Figure 1. Map of North Carolina color coded by single family weatherization regions. Each region will house a collaborative hub that oversees weatherization and home upgrade services for eligible NC residents. Region 8 encompasses the entire state and is specifically for weatherization of multifamily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

Due to the technical and changing nature of the WAP, development of a strong Training and Technical Assistance (TTA) program component is essential. Currently, introductory Wx training courses are offered every year for new Subgrantee hires or contractors. Other courses are offered depending on Subgrantee needs and per U.S. Department of Energy (DOE) or State requirements. Weatherization Training has two categories:

1. Tier 1 Training—Comprehensive, occupation-specific training that follows a Job Task Analysis (JTA) curriculum for the respective position. Recertification is required every three years. Training must be administered by, or in cooperation with, a training program that is accredited by a DOE-approved and accredited organization for the JTA; and,
2. Tier 2 Training—Single-issue, short-term, training to address acute deficiencies in the field such as training conferences, monitor training, peer- to-peer training, and others.

III. Statement of Need

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. NC DEQ acknowledges that structured Wx training is one of the biggest stumbling blocks to the advancement of North Carolina’s WAP. By current practices, training is almost exclusively completed to obtain or renew a certification. The State of North Carolina does not presently have formalized training that teaches students an applicable



understanding of Wx practices, which forces on-the-job trainers to continuously reteach essential Wx concepts and procedures. NC DEQ aims to fund an agency to lead North Carolina’s Weatherization Training Program who is equipped to track the Wx training requirements for participants and conduct both required and optional training courses. The intention of the training program is to elevate weatherization from a trade to a profession.

The SEO at NC DEQ requests development of a Wx Training Matrix that formulates an established path for Wx professionals to follow. The Wx Training Matrix should lead Wx professionals through varying levels of expertise; levels may include initial instruction, refresher, and advanced single subject classes on vital subjects, such as combustion safety and ventilation. All proposed courses must be vetted by the State and reflect approved standard work specifications, diagnostic thresholds, and program processes.

The Wx Training Matrix should create opportunities for professional development within one or between various weatherization positions (i.e., advanced training options, training for lateral jobs, or even training across roles like from administration to technical and vice versa). Overall, these trainings can support career advancements and could be used as a benchmark for employee performance, promotion, and compensation. All training and certifications are required to follow state and federal requirements for weatherization activities (Supplement 1 – Sample Training and Certification Schedule). For equitable access to workforce development opportunities, training should be held at each of the 7 regional Wx Collaborative hubs in the state.

Funding for the Wx workforce development program is available throughout the state over five years.

IV. RFP Timeline

RFP activity	Time and Date
RFP posted	9:00 am Friday, June 30, 2023
RFP questions by bidders due	5:00 pm Friday, July 21, 2023
RFP answers posted by NC DEQ	5:00 pm Monday, July 31, 2023
RFP due	5:00 pm Friday, September 1, 2023
Awards Selected	5:00 pm Friday, December 15, 2023

V. Funding Source

The Bipartisan Infrastructure Law (BIL) was enacted on November 15, 2021, with the U.S. 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 \$7.35M is available to support the development and implementation of WAP training.

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 guidance. The \$7.35M 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 in North Carolina.
2. The Bidder(s) shall be familiar with both DOE's and North Carolina's Weatherization Assistance Program.
3. The Bidder(s) must be accredited by [Interstate Renewable Energy Council \(IREC\)](#) or received accreditation by January 31, 2024.
4. The Bidder(s) must have the ability to conduct in person regional training in the state of North Carolina.
- 5.

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 collaborative training:

- Agency name(s), address(es), and technical lead(s).
- A description of the agency's experience and preparedness to implement training.



- A description of the proposed training and materials, including the training locations and formats (i.e. in person, virtual, hybrid, etc.). Training should be held at regional training centers, incorporate required State mandates (Supplement 1), and match the call for a Wx Training Matrix.
- A proposed timeline and/or frequency for training events.
- Methods for statewide engagement of Wx agencies.
- A plan describing how the training program will field and answer questions training and in real-time.
- A community benefits analysis, describing how the proposed methodology and training will improve weatherization services for LMI households and disadvantaged communities (DACs).
- A list of metrics that will be collected by the training program to track and quantify training in Wx agencies and indicate training success.
- Methods for regular reporting on objectives metrics, project progress, and any project setbacks (with root cause analysis) encountered.
- 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.
- A detailed budget for training, including a line item for training local agencies.
- Resumes of those who will lead training and development of the Wx training program.
- Three letters of support advocating for the applying agency's capability in the proposed project.

VIII. Tools and Training

The Wx Training Agency should be prepared to train participating agencies in the following:

- a. **Deferral Tracking:** U.S. DOE encourages the tracking of deferrals using consistent terminology for recording the reasons and what repairs would be necessary in order to proceed with weatherization. When repairs are necessary in order to install energy efficiency measures, but those repairs are beyond the allowable limits of incidental repairs and/or health and safety cost categories, deferral is often required. If other funding sources were available to address the repairs, it would increase the number of low-income homes WAP could effectively weatherize. DOE WAP has developed a tracking tool to provide consistent terminology and a brief video training describing how the tool is organized. DOE WAP will continue to work with our providers to address additional barriers and facilitate effective braiding of funds. DOE is developing training resources, including in the Learning Management System (LMS) to assist Grantees in braiding funds to address structural issues and enable deeper retrofits. Newly released SERC and E&I grant opportunities also allow for deeper retrofits being braided with typical weatherization work.
- b. **Justice40 Initiative:** 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 Wx Training should include the importance of providing 40% of weatherization benefits to DACs in NC. NCDEQ has created a map of the top-priority, overlapping places to weatherize (TOP-W) in NC. The training agency should plan to teach Wx agencies how to utilize the TOP-W map and prioritize weatherization in the geographic areas defined within their service areas.

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 5:00 p.m. Eastern Standard Time, Friday, July 21, 2023.

NC DEQ will not respond to verbal questions. All questions received by 5:00 p.m. Eastern Standard Time, Friday, July 21, 2023 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 Monday, July 31, 2023.

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 5:00 PM Eastern Standard Time, on Friday, September 1, 2023. Proposals may be submitted through [this 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 the committee's



decisions on Friday, December 15, 2023 at 5:00 p.m. 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
Training Experience	10
Proposed Training Materials and Methods	30
Weatherization Agency Engagement Plan	20
Community Benefits Analysis	15
Metrics for Reporting	15
Budget	10
Total Score	100

XIII. Announcement of Award Recipients

Applicants will be notified of their proposal funding status by e-mail on Friday, December 15, 2023 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”.
- 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.

The 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. Required reporting documents for a complete monthly billing package include but are not limited to:
 - Purchase Order *[NC WAP Template]*



- Invoice [NC WAP Template]
 - Signature, date, and title of two separate management staff.
 - Financial Status Report “286” [NC WAP Template]
 - PDF (*signed, dated, and title of certifying official*) and Excel (*unsigned*) versions of the FSR 286, respectively
 - The preparer and program coordinator should be a different person than the Certifying Official.
 - Project Expense Summary [NC WAP Template]
 - Date of Purchase
 - Vendor Invoice Number
 - Vendor Name
 - Subgrantee Project ID
 - Invoiced Amount by Budgeted Line-Item Category (*to include a statement of whether sales tax was charged for all expenses*).
 1. **Official receipts** and supporting documentation to match the exact amount billed (*i.e., for training materials, subcontractor costs, personnel costs, etc.*),
 2. Subgrantee writes “Subgrantee Project ID” on receipts and how much was charged to DOE funds.
 - Training Amount
 - Checkbox for whether purchases align with NC WAP’s “Build America, Buy America” guidance.
 - Contracted Amount
 - Project Total for Billing Cycle
 - Signature, date, and title of Financial Director.
- b. Reporting Format – DEQ has provided 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.
- 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*).

Supplement 1 – Sample Training and Certification Schedule

Single Family Retrofit Installer			
Classes	Timeline	Course Method	Duration
Weatherization for Absolute Beginners	Any time after hiring. Only specified for employees unfamiliar with WX	In person	2 days
Fundamentals of Building Science	1 month after hiring	In person	4.5 days
CAZ and Combustion Appliances	4 months after hiring	In person	3 days
NC SWS Specific Crew Best Practices	2 months after hiring	In person	4.5 days
Manufactured Housing Weatherization	2 months after hiring	In person	4.5 days
Audit and Work Scope Utilization and Protocol	6 months after hiring	In person	3 days
ASHRAE 62.2	6 months after hiring	In person	3 days
BPI Infiltration and Duct Leakage	7 months after hiring	In person	3.5 days
BPI Building Analyst Technical	1 year after hiring	In person	4.5 days
IR Basics and Field Applications	2 months after hiring	In person	2 days



Single Family Crew Leader			
Classes	Timeline	Course Method	Duration
HVAC And Mechanical Systems	2 months after hiring	In person	3 days
Fundamentals of Building Science	1 month after hiring	In person	4.5 days
CAZ and Combustion Appliances	4 months after hiring	In person	3 days
NC SWS Specific Crew Best Practices	2 months after hiring	In person	4.5 days
Manufactured Housing Weatherization	2 months after hiring	In person	4.5 days
Audit and Work Scope Utilization and Protocol	6 months after hiring	In person	3 days
ASHRAE 62.2	6 months after hiring	In person	3 days
Building Science Math	2 Months after hiring	In person	3.5 days
Advanced CAZ and Combustion	1 year after hiring	In person	3 days
Modifiable Zonal Testing	1 year after hiring	In person	4 days
The Metrics of Moisture	4 months after hiring	In person	2 days
BPI Infiltration and Duct Leakage	7 months after hiring	In person	3.5 days
BPI Building Analyst Technical	1 year after hiring	In person	4.5 days
IR Basics and Field Applications	2 months after hiring	In person	2 days



Single Family Energy Auditor			
Classes	Timeline	Course Method	Duration
Weatherization for Absolute Beginners	Any time after hiring. Only specified for employees unfamiliar with WX	In person	2 days
Fundamentals of Building Science	1 month after hiring	In person	4.5 days
CAZ and Combustion Appliances	1 month after hiring	In person	3 days
Best Practices for Audit and Work Scope Development	2 months after hiring	In person	4.5 days
NEAT and MHEA	3 months after hiring	In person	4.5 days
Building Science Math	2 months after hiring	In person	3.5 days
Manufactured Housing Weatherization	4 months after hiring	In person	4.5 days
The Metrics of Moisture	4 months after hiring	In person	2 days
ASHRAE 62.2	6 months after hiring	In person	3 days
BPI Infiltration and Duct Leakage	7 months after hiring	In person	3.5 days
BPI Building Analyst Technical	1 year after hiring	In person	4.5 days
BPI Building Analyst Professional	1 year after hiring	In person	3 days
Modifiable Zonal Testing	6 months after hiring	In person	4 days
IR Basics and Field Applications	2 months after hiring	In person	2 days
Energy Auditor Review and Testing	Based on experience	In person	4 days
Quality Control Inspector Review and Testing	Based on experience	In person	2 days



Single Family State Monitor Quality Control Inspector			
PTRC Classes	Timeline	Course Method	Duration
Weatherization for Absolute Beginners	Any time after hiring. Only specified for employees unfamiliar with WX	In person	2 days
Fundamentals of Building Science	1 month after hiring	In person	4.5 days
CAZ and Combustion Appliances	1 month after hiring	In person	3 days
Best Practices for Audit and Work Scope Development	2 months after hiring	In person	4.5 days
NEAT and MHEA	3 months after hiring	In person	4.5 days
Building Science Math	2 months after hiring	In person	3.5 days
Manufactured Housing Weatherization	4 months after hiring	In person	4.5 days
The Metrics of Moisture	4 months after hiring	In person	2 days
ASHRAE 62.2	6 months after hiring	In person	3 days
BPI Infiltration and Duct Leakage	7 months after hiring	In person	3.5 days
BPI Building Analyst Technical	1 year after hiring	In person	4.5 days
BPI Building Analyst Professional	1 year after hiring	In person	3 days
Modifiable Zonal Testing	6 months after hiring	In person	4 days
IR Basics and Field Applications	2 months after hiring	In person	2 days
Energy Auditor Review and Testing	Based on experience	In person	4 days
Quality Control Inspector Review and Testing	Based on experience	In person	2 days

