



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)  
**Weatherization Workforce Development 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 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:

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 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 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 over five years.

#### IV. RFP Timeline

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



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.

## **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.
- 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 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, 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.
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### **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.

### **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 [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 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.

<b>Evaluation Criteria</b>	<b>Points</b>
<b>Educational/Training Experience</b>	10
<b>Proposed training materials and methods</b>	30
<b>Weatherization agency engagement plan</b>	15
<b>Community Benefits Analysis</b>	15
<b>Metrics for Reporting</b>	15
<b>Budget</b>	15
<b>Total Score</b>	<b>100</b>

## 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".
- 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. Required reporting documents for a complete monthly billing package include but are not limited to:
- Purchase Order *[NC WAP Template]*
    - Signature, date, and title of two separate management staff.
  - 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*).

