

NC WEATHERIZATION TRAINING

~ REQUEST FOR PROPOSALS ~

*NC Department of Environmental Quality
Division of the NC Weatherization Assistance Program*

ADMINISTERED BY:

NC Department of Environmental Quality (NCDEQ), Division of the NC Weatherization Assistance Program (NCWAP), 4345 Mail Service Center, Raleigh, NC 27699-4345. NCWAP will provide contractor funding to solicit proposals from qualified applicants to provide onsite training to twenty (20) local community action and government agencies' auditors and five (5) NCWAP State Quality Control Inspectors (QCI). NCWAP delivers Weatherization services to all 100 counties in North Carolina (NC), and uses the Weatherization Assistant 8.9 NEAT/MHEA Manual, National Energy Audit Tool (NEAT) and Manufactured Home Energy Audit (MHEA) software to determine cost-effective energy efficiency measures to be installed in weatherized homes. The NC Health and Safety Plan determines the allowable health and safety measures that may be installed, and the NC Weatherization Installation Standard Work Specifications (NCWISWS) are the standard for the quality of work to be installed.

SUMMARY:

NCWAP is transitioning from primarily Priority List to 100 percent NEAT/MHEA electronic energy audits on all Department of Energy (DOE) units by June 30, 2021. In preparation for the transition, NCWAP is seeking an applicant to provide Weatherization Assistant 8.9 and other weatherization training to the twenty (20) local agencies that deliver the Weatherization Assistance Program (WAP). The applicant will also provide NEAT/MHEA advanced energy audit training to the five NCWAP State QCI to ensure quality electronic energy audits are being conducted at the local agency level. In addition, the applicant will provide training at the NCWAP Annual Training Conference in 2021 (actual date to be determined, due to COVID-19 delays). The contract period is from December 1, 2020 through December 31, 2021. NC has 100 counties, so coordinating onsite trainings at a central location would be helpful. Our twenty agencies are spread across the state with various territory sizes; some agencies serve one county, while others may serve up to eleven counties. Our housing stock is a combination of stick-built and mobile home single-family dwellings.

EXPERIENCE AND CERTIFICATIONS:

Applicant must be an Interstate Renewable Energy Council (IREC) accredited training center. The applicant must demonstrate strong knowledge in use of the Weatherization Assistant 8.9 NEAT/MHEA audit tools, blower door/zonal diagnostics, ductblaster, infrared camera, and combustion appliance zone (CAZ) testing equipment, with a minimum five (5) years' experience with each of these skills. Applicant must be capable of working with diverse populations and must have knowledge of basic construction principles, the weatherization assistant program, energy conservation and energy auditing. Excellent oral and written communication skills and strong analytical capabilities are needed. The applicant must possess a general knowledge and understanding of regulations governing the Department of Energy ("DOE") Weatherization and NCWAP's State Plan, Weatherization Assistant 8.9 NEAT/MHEA Manual, Health & Safety Plan, and NCWISWS.

TRAINING TO BE PROVIDED (Scope of Work):

1) Local NC Weatherization Agency Auditors:

The audience will be about 40% crew-based agency participants, 40% contractor-based agency participants, and 20% energy auditor contractors. Most of the participants are experienced weatherization staff/contractors (3-10+ years). However, there are many that have less than three years' experience. About 50% of the audience have several years' NEAT/MHEA experience, while the rest are beginners, and may need extra attention. We have seventy (70) participants that will be divided into classes A, B, and C listed below. They would benefit most from in-person training. However, due to COVID-19, some trainings may be modified to virtual/remote sessions. Applicant is required to provide at completion of each training session: 1) NEAT/MHEA Certificates to all passing participants; and 2) Test scores to participant and NCWAP. This training is to assist NCWAP in moving from primarily DOE Priority List audits to 100% NEAT/MHEA electronic audits by June 30, 2021.

- A. NEAT/MHEA Training and Test according to Weatherization 8.9 NEAT/MHEA Manual, that includes Setup Library Training. Class is designed for people that have never had NEAT/MHEA Training. Train up to 30 people (ppl) (up to 5-day class that includes testing). Multiple sessions required to complete training for all participants.
- B. NEAT/MHEA Review Training and Test according to Weatherization 8.9 NEAT/MHEA Manual for participants that failed previous NEAT/MHEA Training that includes Setup Library Training. Class is designed for people that need a review of the foundational skills required for NEAT/MHEA. Train up to 30 ppl (minimum full 2-day class review, then test). Multiple sessions required to complete training for all participants.
- C. NEAT/MHEA Refresher Training according to Weatherization 8.9 NEAT/MHEA Manual that includes Setup Library Training. Class is designed for people that have NEAT/MHEA experience but, need refresher skills to optimize use of the software. Train up to 30 ppl (minimum 2-day class; no test required). Multiple sessions required to complete training for all participants.
- D. NEAT/MHEA Electronic Audit Reviews by applicant and recommended corrections to agency auditor in writing (cc NCWAP) for up to forty (40) audits. In case NEAT/MHEA Audit Reviews exceed 40 audits, please include an hourly rate for additional audits in the Proposal Narrative. These reviews should take place after NEAT/MHEA trainings above are completed, to ensure participants have retained skills and are conducting quality electronic audits. Audit reviews to take place between April 1, 2021 - December 31, 2021.

2. State QCI Assessments:

There are five (5) State QCIs: four have been QCI certified for over four years, with one trainee. Four of them have NEAT/MHEA certifications but, could use advanced NEAT/MHEA training, to optimize use of the software and continue to provide quality NEAT/MHEA review/approvals to agencies.

The applicant will evaluate and train five (5) State QCIs to include:

- A. State QCI NEAT/MHEA Advanced Skills Training. The applicant will provide a technical summary of the State QCI's audit review of fifteen (15) local Agencies' audits. Includes review of data collection form, audit input and recommended measures report, audit review checklist, photographs, and ASHRAE calculations. A total of 15 reviews with a technical summary report outlining any issues or areas for improvement on the State QCI audit reviews submitted by the agencies, with ongoing support to State QCIs through June 30, 2021. Due to the importance of the State QCI's role in ensuring that local Agencies are conducting valid energy audits, this training should be prioritized in the beginning of the contract.
- B. State QCI Assessment and Mentoring for five (5) State QCIs (at least 2 days classroom and/or field training). Assessment and mentoring are to ensure state monitoring is conducted according the NCWISWS guidelines and that the quality of agencies' WAP work is evaluated and documented thoroughly.

3. NCWAP Annual Training Conference:

NCWAP Annual Training Conference 75ppt: The applicant will provide up to five (5) hours of technical instruction and training at the conference, based on NCWAP findings or issues in the field, NEAT/MHEA, Quality Control Inspections with Combustion Safety Testing, ASHRAE 62.2.2016, or other applicable NCWAP training. Applicant will coordinate with State QCI in planning this training.

SERVICE DELIVERY & FUNDING:

Training Delivery & Location

Training to be Provided: Preference is In-Person training for all trainings. All In-Person trainings will take place in NC. NC has 100 counties, so coordinating onsite trainings at a central NC location would be helpful. However, due to COVID-19, some sessions may be conducted as virtual or blended learning. Blending Learning is partially virtual/remote and partially in-person. Virtual or Blended Learning may be considered for these sessions: 1) NEAT/MHEA Electronic Audit and Library Reviews by Applicant; 2) State QCI NEAT/MHEA Advanced Skills Training; and 3) NCWAP Annual Training Conference. Applicant must provide a description of their virtual capabilities. The contract period is from December 1, 2020 through December 31, 2021.

In-person NC training location will be provided by the applicant. NCWAP will provide the list of participants and contact information. Applicant will be responsible for training announcements, managing registrations, sending confirmations, obtaining field sites for training, lunch for participants for full-day sessions, training materials, sign-in sheets, and audio-visual equipment.

Frequency and Length of Training

There will be multiple training sessions with various lengths (in “Trainings to be Provided” section) to accommodate all participants throughout the state, and must be in compliance with NC COVID-19 safety protocols:

NC Businesses COVID-19 Guidelines:

<https://covid19.ncdhhs.gov/information/business/businesses-and-employers>

NC follows CDC guidelines for COVID-19 Prevention in Workplace:

<https://www.cdc.gov/coronavirus/2019-ncov/community/organizations/businesses-employers.html>

Administration

Applicant will attend a 4-hour virtual kick-off meeting after reviewing NCWAP technical standards. NCWAP will be responsible for developing the agenda and facilitating the meeting, and will coordinate with applicant. Applicant will provide NCWAP with a training completion report that includes attendance details for each day of the training, evaluations completed by the participants (unedited), an analysis of participant performance, learning assessment results, and any recommendations for additional T&TA or program improvements within thirty (30) business days of completion of the training.

Curriculum Development & Training Preparation

Applicant must use existing curriculum Weatherization 8.9 NEAT/MHEA Manual for training but, may include clarifications for our state-specific standards. NCWAP anticipates sections or modules of existing curricula may be relevant (combustion safety and duct leakage testing), but that portions of the training content will need to be created specifically for this audience after reviewing completed audits, and other background provided to the applicant. NCWAP will review and approve curriculum prior to training on a mutually agreed-upon schedule with the applicant, to be determined upon award of the training contract.

Certification Testing & Continuing Education Units (CEUs)

Applicant will be responsible for facilitating participant testing at end of session, with clearly defined scoring and passing criteria. Applicant is required to provide test scores to participants and NCWAP at the end of each training session. Applicant will be required to secure BPI CEUs for the training participants and submit all required documentation to BPI.

End of Course Evaluations

Applicant will distribute and collate an end of course evaluation, to be emailed to NCWAP within one month of end of course.

Training Retention Activities

Training retention activities are required three weeks and six weeks following completion of the training. The retention activities will be designed and developed by the applicant and delivered virtually/remotely to participants. NCWAP will review and approve training retention activities on a mutually agreed upon schedule with applicant.

Applicant Certification and License Requirements

Applicant must be an Interstate Renewable Energy Council (IREC) accredited training center. Applicant's trainers must have current certification as a BPI Home Energy Professional Energy Auditor and Home Energy Professional QCI that will be in effect through December 31, 2021. Applicant must be able to engage in overnight travel. Valid driver's license is required.

Period of Performance

NCWAP contract award period is December 1, 2020 through December 31, 2021. Below is a tentative timeline for this effort. Once a contractor has been selected, NCWAP and the contractor will work together to modify this timeline, as necessary. Award is subject to funding availability.

- October 9, 2020: Issue Request for Proposals
- October 30, 2020: Receive and review proposals
- November 13, 2020: Contractor award notification
- December 1, 2020: Execute Contract
- December 18, 2020: Contractor develops training schedule
- January 4, 2021: Contractor provides training materials/content to NCWAP
- January 2021 - June, 2021: Applicant provides training to State QCIs
- January 2021 – June, 2021: Applicant provides training to Agency participants
- April 1 – December 31, 2021: Applicant provides NEAT/MHEA Reviews to Agencies/NCWAP
- 2021 (Date TBD due to COVID-19): Applicant provides five (5) hours WAP training to Agencies at NCWAP Annual Training Conference

Funding Information

Contract Funding: \$125,000 is available for NCWAP training and support through this Request for Proposals (RFP). Applicant will invoice NCWAP according to contract, which will include all training expenses.

Pricing Parameters/Method of Payment

All expenses associated with the training (training location, audio-visual equipment, materials, applicant's trainer travel, hotel, per diem, etc.) must be included in the contracted amount. NCWAP will provide additional information on invoice requirements for the selected proposal.

PROPOSAL NARRATIVE:

The proposal should not exceed ten pages in length. Attachments such as certifications and licenses are not a part of the ten-page limit. Be as concise and direct as possible by addressing key issues and information. The applicant shall submit a written narrative outlining each of the following:

Applicant Information

Title of project, name of applicant's organization, local address, telephone number, email address, name of contact person(s), and date submitted.

Applicant's Background and Experience

Give a brief description of the qualifications and experience of the individual(s) assigned to this project by applicant, and briefly describe similar projects which your organization has developed and implemented. Include trainer's technical ability and expertise, and list the individuals that will be assigned to this Scope of Work and the amount of time that each individual will be working on this

project, to ensure applicant has the time and resources for this RFP. Please include copies of required certifications and licenses for these individuals.

Project Strategy / Scope of Work

Provide a detailed description of the proposed scope of work and methodology chosen to achieve the goals of the project. Discuss how the project will be implemented and processes that will be developed. Provide clearly defined, quantifiable and measurable task elements, with clearly stated goals and objectives.

Task Statement and Timeline

Outline major tasks and services to be provided. Include a timeline for task completion.

Project Budget and Budget Narrative

The Project Budget should outline all expenditures for the project. Please include an hourly rate for NEAT/MHEA Audit Reviews that exceed the 40 audits already in Section 1D of Scope of Work.

APPLICATION & AWARD PROCESS:

Application Deadline

Applications must be received (electronically or by mail) by Friday, October 30, 2020, no later than 5:00 pm Eastern Daylight Time to be considered.

Required Proposal Format

The following outline indicates what applicants must include in their proposal for their application to be considered complete. Proposals that fail to provide all the required information may not be considered for funding.

1. Project Title
2. Applicant Contact Information to include the following:
3. Name and title of main contact
4. Organization
5. Address
6. Phone number
7. Fax number
8. E-mail address
9. Date of Proposal Submittal: this should be the date the proposal is submitted to NCWAP
10. General Project Requirements: (see Scope of Work)
11. Written statement certifying that grant funds are used only for proposed NCWAP Training FY21 as services are stated in this Proposal
12. Applicant's written statement indicating the years of experience in providing Weatherization Assistant 8.9 training
13. Provide a description of the grant project

How to Submit Your Proposal

One electronic copy of the proposal must be submitted by email to: wapinfo@ncdenr.gov or mailed to: NC Department of Environmental Quality, NC Weatherization Assistance Program, 4345 Mail Service Center, Raleigh, NC 27699-4345.

Applications must be received by October 30, 2020, no later than 5:00 pm Eastern Daylight Time to be considered. Receipt of all acceptable proposals will be acknowledged by email. If you do not receive a confirmation, contact Maye Hickman at wapinfo@ncdenr.gov or 919-594-4859 as soon as possible. It is the responsibility of anyone submitting a proposal to contact NCWAP if they do not receive a confirmation. Please submit electronic versions of proposals as Adobe (PDF) files.

Grant Selection Process

Through an evaluation process, a selection committee will use the NCWAP Proposal Review Sheet to rank proposals and make award decisions. The review process is expected to be completed and award announcement made by Friday, November 13, 2020. NCWAP will notify the applicant with a formal offer by e-mail. The applicant must accept or decline the offer. The following will occur once the offer of grant funding is accepted:

1. Contractor will be required to register with the state's e-procurement system using the same address provided in the applicant's proposal. To register in the state's e-procurement system, please visit the following link: <http://eprocurement.nc.gov/>
2. NCWAP will execute a Memorandum of Understanding ("MOU") or Grant Contract with Contractor for services
3. NCWAP and Contractor will proceed with the work described in the scope of work

BID EVALUATION & SCORING:

NCWAP retains the right to reject any or all proposals, and to waive technicalities, irregularities, and informalities, and retains the right to cancel or conclude this request for proposals at any time without selecting a firm to provide the described services, without any liability to any respondents, or any other person or entity, and is under no obligation to make an award relating to this request for proposals to any person or entity.

Technical Criteria: 70 pts

Program Delivery Criteria: 30 pts

(See next page)

NCWAP Proposal Review Sheet (Sample only for State Use)

Reviewer Name:

Date:

Applicant Name:

Applicant Budget: \$

**List Attached
Certifications:**

I. Technical Criteria (70 possible points)

Score Possible

Qualifications of applicant in proposed project and experience conducting WAP training programs, in depth knowledge of energy audits, general knowledge of WAP regulations and standards. Please list the trainers by name and include their qualifications summary, and include copies of trainer's certifications/licenses as attachments to this proposal.		<u>30</u>
Previous experience with NEAT/MHEA training, learning assessments, NEAT/MHEA advanced skills training, State QCI Mentoring, and Weatherization Conference Training technical presentations and Content of Proposal.		<u>30</u>
Previous experience with NEAT/MHEA audit reviews and please state your process and how you will document these reviews.		<u>10</u>

II. Program Delivery Criteria (30 possible points)

Score Possible

Proposed project strategy, deliverables and timeline to complete the project and deliver on the scope of work.		<u>30</u>
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REVIEWER NOTES: