



**Florida Association for
Community Action, Inc.
Request for Proposals**

for

**Training Vendor
for the
Weatherization Assistance Program**

Written proposals are required via e-mail by **January 16, 2023 at 5 p.m. EST**
to Kenya Woodard, Interim Executive Director at admin@faca.org.

REQUEST FOR PROPOSALS

The Florida Association for Community Action, Inc. serves as a contractor for the State of Florida Department of Economic Opportunity (DEO) providing coordination and capacity building Training and Technical Assistance (T&TA) for the Florida State Community Action Network including the Weatherization Assistance Program (WAP).

BACKGROUND

DEO delivers weatherization services in coordination with other state and local partners. The WAP is funded by the U.S. Department of Energy (DOE) and U.S. Department of Health and Human Services (HHS). The purpose of WAP is to install energy conservation measures in homes of income-eligible persons, especially homes occupied by the elderly, persons with disabilities and children. The WAP helps to reduce national energy consumption, reduces carbon emissions that contribute to climate change and lessens the impact of higher energy costs on low-income families. It also provides health and safety of assisted households.

The Florida WAP uses the Weatherization Assistant, National Energy Audit (NEAT) and Manufactured Home Energy Audit (MHEA) to determine cost-effective energy efficiency measures to be installed. The Florida Health and Safety Plan determines the allowable health and safety measures that may be installed. The Florida Standard Work Specifications (SWS) and Florida Field Guide (FFG) are the standard for the quality of work to be installed. The Florida WAP state plan, policy and procedures manual, health and safety plan, and other documents can be found here at <http://www.floridajobs.org/community-planning-and-development/community-services/weatherization-assistance-program>.

SUMMARY

FACA is soliciting proposals from qualified applicants to perform comprehensive training for all WAP providers in the state of Florida. DEO contracts with 16 local community action agencies to deliver the WAP to all 67 counties in Florida.

The applicant must possess a general knowledge and understanding of regulations governing the DOE's WAP and Florida's WAP state plan, field guides, and health and safety plan. Excellent oral and written communication skills and strong analytical capabilities are needed. The applicant must demonstrate strong knowledge in use of NEAT/MHEA audit tools, blower door, infrared camera, and combustion appliance zone (CAZ) testing equipment. The applicant also must have experience providing training to participants with a variety of learning styles, experience providing training curriculums, and experience providing technical assistance. Must be capable of working with diverse populations and must have knowledge of basic construction principles, energy conservation, and energy auditing.

SCOPE OF WORK

The provider will collaborate with FACA and DEO to create a customized training plan for the Florida WAP. Training delivery must include virtual component for classroom requirements and video recording for on-demand access to fundamental topics. Provider will be responsible for securing lab facility for in-person requirements for all 16 providers and handle scheduling and logistics for all trainings. Provider will award certificates of completion to attendees.

- 1) The plan will include at a minimum the following list of required trainings and any others as identified by FACA and DEO:
 - a. Energy Auditor Certification Training according to The Building Performance Institute (BPI). BPI is the nation's premier certification and standard-setting organization for home performance professionals.
 - Energy Auditor – Multifamily
 - Energy Auditor – Single Family
 - b. Quality Control Inspector (QCI) Training (BPI)
 - c. Crew Leader Training
 - d. EPA Certified Renovator Training
 - e. Combustion Appliance Zone (CAZ) Refresher Training
 - f. Health and Safety Training
 - ASHRAE 62.2
 - OSHA 1 Construction Safety - Personal Protective Equipment
 - Other health and safety trainings as identified by FACA and DEO.
 - g. HVAC Fundamentals
 - h. Gas Testing and Air Sealing
 - i. Weatherization Installer/Technician Fundamentals
 - j. Weatherization 101
 - Principles of home-energy efficiency and building science. Curriculum should follow Department of Energy's Weatherization Installer/Technician guidelines

- k. NEAT/MHEA Training
- Energy Modeling/Energy Audits

TRAINING LEVEL	COURSE DESCRIPTION
NOVICE	Training and Test according to Weatherization 8.9 NEAT/MHEA Manual that includes Setup Library Training. This course is designed for those who have never had NEAT/MHEA Training. Train up to 30 participants (up to five (5)-day course that includes testing). Multiple sessions required to complete training for all participants.
INTERMEDIATE AND EXPERT	Review Training and Test according to Weatherization 8.9 NEAT/MHEA Manual for participants who failed previous NEAT/MHEA Training that includes Setup Library Training. This course is designed for those who need a review of the foundational skills required for NEAT/MHEA. Train up to 30 participants (minimum full two (2)-day course review, then test). Multiple sessions required to complete training for all participants
	Refresher Training according to Weatherization 8.9 NEAT/MHEA Manual that includes Setup Library Training. This course is designed for those who have NEAT/MHEA experience but need refresher skills to optimize use of the software. Train up to 30 participants (minimum two (2)-day course; no test required). Multiple sessions required to complete training for all participants.
EXPERT	Electronic Audit Reviews by applicant and recommended corrections to agency auditor in writing 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, 2023 - December 31, 2023.

Provider also will:

- Share sessions provided for each training level
- Define a full day of training (i.e. eight hours with a lunch)
- Offer training at the Annual Training Conference
- Offer opportunities to make-up training for missed sessions
- Offer training on additional topics as directed by FACA or DEO

Upon approval by FACA and DEO, the applicant will deliver all trainings included in the plan.

2) **Technical Assistance:**

The provider will deliver phone support for technical questions as needed, charged by the hour. Technical assistance needs could be from DEO, Subrecipients, or U.S. DOE. A DEO team member must be present on technical assistance consultation with Subrecipients or U.S. DOE. Provider will create a system to report and document technical questions, and a summary of response provided.

Due to the importance of the State Quality Assurance Inspection role in ensuring that Subrecipients are conducting valid energy audits, the provider will review a sampling of QCIs and provide DEO with a summary report outlining any issues or areas for improvement on the State QCI audit reviews.

- 3) The provider will develop a system for tracking training effectiveness. The system should include, but is not limited to preliminary exam, post training exam, etc. The provider will file a monthly progress report to FACA. FACA will be responsible for submitting reports to DEO. The report will be due on the last Friday of the month.
- 4) Upon completion of the full plan, the provider will deliver a comprehensive assessment report that details the overall impact of the WAP training for the state of Florida. The report will include both qualitative and quantitative data reflective of improvements in network capacity and knowledge in each identified training area.
- 5) The provider will deliver training during the FACA Annual Training conference in May 2023. The purpose of the training will be to provide guidance and instruction to all 16 WAP Subrecipients during the conference workshops. This training will be mandatory for the Weatherization Network. Provider, FACA, and DEO will determine specific workshop content prior to the conference dates.
- 6) The provider will deliver up to five hours of technical instruction and training in May 2023, based on findings or issues in the field, ASHRAE 62.2.2016, NEAT/MHEA, Combustion Safety Testing or other applicable WAP training.

CERTIFICATION AND LICENSE REQUIREMENTS

Must have current certification as a Home Energy Professional Energy Auditor and Home Energy Professional Quality Control Inspector that will be in effect through 12/31/2023. Must have Building Performance Institute (BPI) Training Certification. All courses must be IREC certified. Must have Interstate Renewable Energy Council (IREC) certification. Must be able to engage in overnight travel. Valid driver's license is required.

SUBMISSION OF PROPOSALS

Written proposals are required via e-mail by **January 16, 2023 at 5 p.m. EST** to Kenya Woodard, Interim Executive Director at admin@faca.org. Questions may be directed in writing via e-mail to Kenya Woodard at admin@faca.org.

AWARD INFORMATION

Estimated Funding: Approximately \$125,000 is available for WAP training project.

Period of Performance: FACA anticipates awarding the contract to begin in the first quarter of 2023 and to terminate no later than September 30, 2023. Below is a tentative timeline for this effort. Once a contractor has been selected, FACA and the contractor will work together to modify this timeline as necessary. Award is subject to funding availability.

December 19 2022:	Issue request for proposals
January 2023:	Receive and review quotes, select contractor
March 2023:	Execute contract, develop schedule, training materials/content, provide training plan
March 2023 – Aug. 2023	Deliver trainings to agencies, monthly report
May 2023:	Annual Training Conference, audit libraries approved
August 2023	Deliver Comprehensive Assessment Report

Pricing Parameters/Method of Payment: FACA will provide additional information on invoice requirements for the selected proposal. In addition to standard management and financial reporting requirements, the following information and supporting documentation will be required in invoices as appropriate and applicable to the proposed project:

- Training Summary
- Training Attendance Reports
- Technical Assistance/Consultation Reports
- Monthly Progress Reports
- Expenditures

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:

Cover Letter: All applicants or their authorized representative shall prepare and sign a cover letter. Submission of the letter shall constitute a representation by the applicant that it is willing and able to perform the services described in the Request for Proposal (RFP) and their proposal response. Cover letter must include title of project, name of Applicant's organization, local address, telephone number, email address, name of contact person(s), and date submitted. **This section counts toward the ten (10) page limit.**

Business and Management Structure: Provide a description of the applicant organization's size, background, and structure, a list by name and title of management personnel. Indicate which management personnel will be responsible for the delivery of services under the contract. **This section counts toward the ten (10)-page limit.**

Background and Experience: Give a brief description of the qualifications and experience of the individual(s) assigned to this project, and briefly describe similar projects that your organization has developed and implemented. Include staff member's technical ability and expertise. Please include copies of required certifications and licenses for these individuals. **Copies of certifications DO NOT count toward the ten (10)-page limit. All other items in this section count toward the ten (10)-page limit.**

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. Include preliminary feedback on the WIT, Exhibit A. Provide clearly defined, quantifiable and measurable task elements, with clearly stated goals and objectives. Include sample curriculum and benchmarks. **This section counts toward the ten (10)-page limit.**

Task Statement and Timeline: Outline major tasks and services to be provided. Include a timeline for task completion. **This section counts toward the ten (10)-page limit.**

Project Budget and Budget Narrative: The Project Budget should outline the expenditures for the project. The Budget Narrative should include a detailed explanation of the expenditures outlined in Applicant's Project Budget. **This section counts toward the ten (10)-page limit.**

References: Provide a list of completed projects in similar scope to proposed project. References to include business contact name, title, phone number and email.

EVALUATION AND SCORING

FACA 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: 60 pts

Program Delivery Criteria: 40 pts

WAP Proposals Review Sheet

Reviewer Name: _____

Date: _____

Applicant Name: _____

Applicant Budget: \$ _____

List Attached
Certifications: _____

I. Technical Criteria (60 possible points)

Score Possible

Scope of Work – Applicant details how they will perform the work based on specifications stated in the RFP. Applicant provides clearly defined, quantifiable and measurable task elements, with clearly stated goals and objectives. Applicant includes description of assessment planning and preliminary review of the WIT (Exhibit A).	30
Background and Experience – Applicant personnel possess required certifications, technical skills and demonstrates clear history of successful similar project completion. Please list individuals by name and include their qualifications summary, and include copies of certifications/licenses as attachments to this proposal. Vendor while IREC accredited and BPI qualified, must demonstrate having instructional materials, lab resources, online access to educational material and subject matter expertise in the area of QCI, Energy Auditor, Crew Lead, Installer, DEO's in place energy audit tool NEAT and MHEA.	20
References – Past projects supporting Applicant's stated experience with WAP priority training needs as identified in Scope of Work Section 1.	5
Business and Management Structure – Applicant has adequate business structure and staffing resources to manage the project from design to completion.	5

II. Program Delivery Criteria (30 possible points)

Proposed project strategy, deliverables and timeline to complete the project and deliver on the scope of work.	40
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REVIEWER NOTES:
