

Bidders Conference

Program Operator Request for Proposals for:

Statewide Weatherization Barriers Remediation Program

November 22, 2021

AGENDA AND LOGISTICS

Agenda

11:00	Welcome, Agenda, and Logistics
11:05	Issue and Background
11:15	Summary of RFP
11:35	Q&A
12:55	Next Steps

Meeting Reminders

- This meeting is being recorded and will be posted on the DEEP website
- Please remain on "mute" when you are not speaking
- Use the "raise hand" function to indicate if you have a question
- Please identify yourself before you speak
- Limit your use of the chat function so as not to distract from the meeting
 - You may use the chat to alert us of technical difficulties during the call
 - We will try to get to questions asked in the chat
- Written questions that come up after the meeting can be sent to Holly.SucHECKI@ct.gov by December 1, 2021 at 4pm

Meeting Purpose

- The purpose of this RFP Conference is to answer questions from prospective bidders
- Questions and discussion must stay focused on better understanding the RFP requirements and submission process
- DEEP may immediately answer logistical questions during the conference but reserves the right to respond to questions in writing by the date stated in the RFP, December 10, 2021

Acronyms

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ARPA: American Rescue Plan Act of 2021

CEAP: Connecticut Energy Assistance Program

DEEP: Department of Energy and Environmental Protection (CT)

DSS: Department of Social Services (CT)

HES-IE: Home Energy Solutions - Income Eligible (CT)

HHS: Department of Health and Human Services (US)

LIHEAP: Low Income Home Energy Assistance Program (US)

PSA: Personal Service Agreement

RFP: Request For Proposal

WAP: Weatherization Assistance Program (US)

Definitions

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American Rescue Plan Act of 2021 (ARPA): The American Rescue Plan Act of 2021 (ARPA) is the sixth federal COVID-19 relief bill passed in the last year, oriented toward transformative, equitable and healthy recovery for the state

Community Action Agency (CAA): State and federally designated non-profit organizations receiving federal funding to address the causes and conditions of poverty

Contractor: Any organization, company, agency, or other entity that enters into a Purchase of Service (POS) contract with the Agency as a result of this RFP

Low Income Home Energy Assistance Program (LIHEAP): The Low Income Home Energy Assistance Program (LIHEAP) is a Block Grant distributed by the U.S. Department of Health and Human Services and administered by the Connecticut Department of Social Services primarily through The Connecticut Energy Assistance Program (CEAP)

Program Operator: The contractor selected competitively through this RFP is the Program Operator for the Weatherization Barrier Remediation Program administered by the Department of Energy and Environmental Protection and is responsible for any subcontractors providing remediation services

Proposer: An entity that submitted a proposal to the Agency in response to this RFP. This term may be used interchangeably with Respondent and Bidder throughout the RFP

Qualified Entity: Any organization with experience implementing residential energy efficiency, or health and safety repair and remediation programs that has the capacity to abide by all state and federal rules, particularly those regarding the use of grant money

ISSUE AND BACKGROUND

The Issue

- **Up to 23% of the homes serviced by Connecticut's Home Energy Solutions Income-Eligible (HES-IE) program** contain barriers that prevent the completion of weatherization measures
 - Best estimate: 67,000 income-eligible homes in CT with barriers
 - Based on 2017-2019 HES-IE data: Asbestos, mold, venting/combustion issues, and vermiculite were the most common.
 - Barriers to weatherization lead to higher, long-term energy costs for that home and are linked to conditions including asthma, allergic reactions, increased cancer risks, respiratory illnesses, and more*
- **Remediating barriers improves a home's energy efficiency** and reduces future energy bills, which in turn reduces dependence on the Low-Income Home Energy Assistance Program (LIHEAP) and other programs for bill assistance

* <https://www.greenandhealthyhomes.org/home-and-health/home-health-hazards/>

Procedural Background

- Stakeholders, especially Home Energy Solutions vendors with their data collection practices and field experience, brought the weatherization barriers issue to the Utilities, Department of Energy and Environmental Protection (DEEP), the Energy Efficiency Board (EEB), and others
- DEEP and the EEB ran workshops to learn about weatherization barriers and hear from stakeholders in November 2020 and January 2021
- DEEP released a Draft Request for Proposals in August 2021 and received feedback through a public meeting, written comments, and meetings with individual stakeholders
- DEEP released the Final RFP in November 2021

Purpose of the Program

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- Address health and safety issues, including but not limited to asbestos, mold, vermiculite, unsafe appliance combustion, gas leaks, carbon monoxide, structural issues, venting issues, and knob and tube wiring, that impede the ability to move forward with weatherization measures
- Couple health and safety barrier remediation with energy efficiency intervention to provides a path to reducing excess housing and energy burdens experienced by low-income households
- Generate non-energy benefits that improve physical and social determinants of health, population health, and social equity

SUMMARY OF RFP

Timeline

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RFP Released	November 10, 2021
RFP Conference	November 22, 2021, at 11:00 AM
Deadline for Questions	December 1, by 4:00 PM
Answers Released	December 10, 2021
Proposals Due	January 4, 2022, by 4:00 PM
Proposer Selection	January 2022

Funding and Awards

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Number of Awards: Minimum one (1)

Total Available Funding: Up to \$12,300,000 through December 31, 2024

Funding Sources:

1. Up to \$5,500,000 over FFY22-24 (January 1, 2022 – September 30, 2024) from the Low Income Home Energy Assistance Program
2. Up to \$6,650,000 in supplemental funding from the 2021 American Rescue Plan Act (ARPA) funding to support Health and Safety Barriers to Housing Remediation over 2022-2024 (January 1, 2022 – December 31, 2024)
3. Up to \$150,000 in supplemental funding from the U.S. Department of Energy's State Energy Program (SEP) through FY22 (July 1, 2021 - June 30, 2022)

Eligibility

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A Qualified Entity is defined as any organization, company, agency, or other entity that has:

- experience implementing residential energy efficiency, or health and safety repair and remediation programs
- the capacity to abide by all state and federal rules, particularly those regarding the use of grant money

Bidders are requested to apply for the total available funding (described in Section 1.B.5); DEEP has discretion to limit the amount of available funding and select multiple Program Operators

II. PURPOSE OF RFP AND SCOPE OF SERVICES

starts on page 6

SCOPE OF SERVICE DESCRIPTION

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The selected entity will oversee:

- (1) establishing the eligibility of customers requesting services from the Program
- (2) connecting customers with the appropriate resources to complete the barrier remediation work
- (3) inspecting completed barrier remediation work
- (4) confirming that once the barriers are remediated, weatherization measures are completed through the Home Energy Solutions-Income Eligible program (HES-IE) or Weatherization Assistance Program (WAP)

SERVICE EXPECTATIONS

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- Ability to begin accepting customer barrier remediation applications and/or referrals from HES-IE and WAP vendors on April 1, 2022

Core Components of Service (non-exhaustive) include:

- Client intake and eligibility confirmation
- Determining appropriate credentials for a health and safety specialist, then identify and hire a qualified and properly credentialed health and safety specialist(s) to
 - (1) verify the presence of the health and safety issue after it is identified by the HES-IE or WAP technician,
 - (2) determine the scope of work needed to address the issue(s),
 - (3) ensure weatherization can be completed after the remediation of the issue(s),
 - (4) identify and hire a qualified remediation contractor(s) to perform the remediation work as determined by the health and safety specialist(s), and
 - (5) verify the issue(s) are addressed after barrier mitigation is completed
- Communicate with the remediation contractor and health and safety specialist regarding allowable expenses to ensure all expenses will be approved under Program rules

SERVICE EXPECTATIONS

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- Coordinate with and establish processes with entities such as the Community Action Agencies and the Utilities who are responsible for managing statewide weatherization work
- Set up a system that integrates and communicates with the existing Weatherization Assistance Program and utility-funded Home Energy Solutions-Income Eligible (HES-IE) systems and databases in order to facilitate and streamline cross referrals
- Ensure remediation subcontractors and health and safety specialists provide clear and accurate invoices (a) to facilitate payment to these entities for allowable expenses and (b) for submission of reports and invoices by the Program Operator(s) to DEEP
- Coordinate with programs, agencies, and other state, local, utility and non-profit organizations that may provide complementary home and energy assistance funding and offerings to avoid duplication

PERFORMANCE MEASURES

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These measures highlight key priorities that will be analyzed with proposers and other stakeholders collaboratively during the life of the contract.

- Determine appropriate credentials for health and safety specialists and remediation contractors, and work with an adequate number of contractors to provide equitable coverage
- Service, at a minimum, the number of units in each budgeting scenario
- Maintain average/maximum allowable expenditures per unit according to funding source
 - LIHEAP/ARPA : \$15,000 average project cost or \$30,000 maximum project cost
 - LIHEAP funds only: \$8,000 average project cost and \$15,000 maximum project cost
- Coordinate with weatherization vendors to track leveraged funds through HES-IE and WAP
- Report on weatherized units following barrier remediation efforts
- Quantify benefits and savings of barrier remediation/weatherization services per unit completed
- Demonstrate scalability and management of full funding levels
- Report on customer and vendor satisfaction

CONTRACT MANAGEMENT/DATA REPORTING

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Proposers are expected to provide, at a minimum, the monthly key data and metrics below to DEEP:

1. Total Number of Applicants
(Approved/Denied)
 1. Financial data – Income, % SMI, % Energy Burden
 2. Demographic data – Age, race, employment
 3. Vulnerability data – Elderly, disabled, children under 6
2. Total number of Units Completed
 1. Summary of work performed
 2. Categorized expenses
 3. Utilization of a tracking sheet shared with DEEP
 4. Monthly check-in meetings required

III. PROPOSAL SUBMISSION OVERVIEW

starts on page 10

Evaluation Criteria

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I. Organization, Experience, and Service Delivery (30%)

- I. Organizational Profile
- II. Scope of Services

II. Team Qualifications and Cultural Competency (20%)

- I. Staffing Plan
- II. Subcontractors
- III. Cultural Competency

III. Project Planning, Data Management, and Reporting (30%)

- I. Work Plan
- II. Data and Technology

IV. Budgeting and Cost Competitiveness (20%)

- I. Financial Profile
- II. Cost Competitiveness and Budget Narrative

IV. REQUIRED PROPOSAL SUBMISSION OUTLINE AND REQUIREMENTS

starts on page 15

Submission Requirements

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The electronic copy of the proposal must be emailed to official agency contact for this procurement. The subject line of the email must read: Statewide Weatherization Barrier Remediation Program Operator

A complete bid must have:

1. Cover sheet
2. Table of Contents
3. Executive Summary
4. Main Proposal
 - a. Organization, Experience, and Service Delivery
 - b. Team Qualifications and Cultural Competency
 - c. Project Planning, Data Management, and Reporting
 - d. Budgeting and Cost Competitiveness
5. Attachments (clearly referenced to summary and main proposal where applicable)
6. Declaration of Confidential Information
7. Conflict of Interest - Disclosure Statement
8. Statement of Assurances

Budget Template

Attachment 2

- Part of the required submission process involves providing a complete budget using the pre-designed template
- The template includes three funding scenarios
 1. LIHEAP only
 2. ARPA only
 3. LIHEAP and ARPA combined
- Bidders should use their discretion when deciding which budgets to estimate but providing budget estimations for all three scenarios is encouraged

Submission Process

- Submission (page 6):
 - Holly.SucHECKI@ct.gov, is the only authorized recipient of proposals submitted in response to this RFP
 - Proposals must be received by the Official Contact on or before January 4th, 2022 at 4pm
 - Proposals received after the due date and time will be ineligible

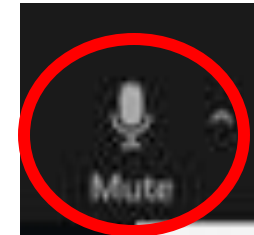
Program Operator Selection

- Anticipated Selection Timeframe: January 2022
- After evaluating all proposals, the Review Committee will submit the rankings of all proposals to the Commissioner
- The final selection of a successful proposer is at the discretion of the Commissioner or Agency Head
- Selected proposer(s) will be so notified and awarded an opportunity to negotiate a contract with the Agency
- DEEP reserves the right to decline to award contracts for activities in which there are not adequate respondents

Q&A



1. Raise your hand to ask a question by pressing the raise hand button at the bottom of your screen (sometimes you must click reactions first to see the raise hand option) or press *9 on your phone if you dialed in
2. DEEP will call your name as it is displayed on Zoom
3. Unmute yourself in Zoom, and on your phone if you have called in for audio
4. Please state your name and affiliation
5. When you are done speaking, mute yourself again by clicking the mute button and lower your hand by clicking the lower hand button or *9 if on the phone



Next Steps

- Deadline for Questions: December 1, by 4:00 PM
- Answers Released: December 10, 2021
- Proposals Due: January 4, 2022, by 4:00 PM
- Proposer Selection: January 2022

All questions and proposal submissions must be sent to Holly Suchecki at Holly.Suchecki@ct.gov. She is the Official Contact and the only authorized recipient of proposal submissions.