

ROY COOPER  
Governor

ELIZABETH S. BISER  
Secretary

JULIE WOOSLEY  
Director



NORTH CAROLINA  
Environmental Quality

January 24, 2024

Mr. Brian Coble  
Chief Operating Officer  
North Carolina Advanced Energy Corporation  
909 Capability Drive, Suite 2100  
Raleigh, NC 27606

Subject: Review of Request for Proposal for the Weatherization Assistance Program's Five-Year Bipartisan Infrastructure Law Funding Opportunity

Dear Brian,

Congratulations on behalf of the North Carolina Department of Environmental Quality, State Energy Office. Your application submitted for the "*Weatherization Assistance Program's (WAP) Five-Year Bipartisan Infrastructure Law (BIL) Funding Opportunity*" has been conditionally approved in the amount of \$5,057,771 for "*Region 2*"; \$10,707,519 for "*Region 3*"; and \$5,413,647 for "*Region 4*". As a condition of the subaward, the WAP will be required to conduct a public hearing in accordance with 10 CFR 440.14 and 10 CFR 440.15 to formally adopt your organization as the qualified provider for "*Regions 2, 3, and 4*" of the BIL program. In addition, to receive the full funding amount, at least 30% of housing units in North Carolina's BIL State Plan must be weatherized within the funding timeframe.

Please note that as a result of progress evaluations, WAP may, at its delegated discretion, authorize the following actions: (1) continue to fund the project, contingent upon the availability of funds appropriated by the United States Department of Energy for the purpose of this program and the availability of future-year budget authority; (2) place a hold on funding the project, pending further supporting data or funding; or (3) discontinue funding for the project because of insufficient progress, change in strategic direction, or lack of funding.

Before proceeding with next steps, North Carolina Advanced Energy Corporation must sign the acknowledgement form concerning the following documents for the BIL program by February 7, 2024:

- Application Assessment
- Five-Year BIL State Plan
- Health and Safety Plan
- Standard Work Specifications
- Training and Technical Assistance Plan

A digital "*RightSignature*" package will separately provide the above documents to you within five business days. Thank you for your willingness to participate in the BIL program. Together, we will implement a robust program that best serves North Carolina's underserved and disadvantaged communities.

Sincerely,

A handwritten signature in black ink that reads "Matthew Davis".

Matthew F. Davis  
State Energy Office  
Weatherization Supervisor



North Carolina Department of Environmental Quality | State Energy Office  
217 West Jones Street | 1613 Mail Service Center | Raleigh, North Carolina 27699-1613  
919.707.8778

# Evaluation Process and Scoring – Single Family NC Advanced Energy Corporation

Each application will be assessed to the degree in which applications meet the following evaluation criteria:

- (1) Applicant’s experience and preparedness to implement weatherization services across the state of North Carolina,
- (2) Recruitment strategies to identify multi-family units to be weatherized, specifically how will units within disadvantaged communities (*DACs*) and households with at-risk population be identified. Describe your organization’s experience that would assist in complying with Davis-Bacon and Build America Buy America (*BABA*),
- (3) Retention and advancement of a modern workforce in weatherization and how the plan aligns with Justice40 (*J40*) Initiatives,
- (4) How the agency leverages partners in implementing energy efficient and clean energy upgrades that assist in a more resilient energy grid,
- (5) Metrics collected for persons in single family homes and methods for keeping private and personal information safe,
- (6) The plan reporting project progress and any project setbacks, and,
- (7) Identification of Go/No-Go milestones in the project.

	Evaluator 1	Evaluator 2	Evaluator 3	<b>Average Score</b>
AE	88	75	88	84

**Overall Comments**

Advanced Energy's regional support is impressive as evidenced by their letters of recommendation.

Applicant successfully describes tools, methods, and approaches to target J40 communities. However, the response could be strengthened by showcasing deployment strategies and/or how past experiences could translate to this project.

Overall, the applicant offers robust knowledge, skills, abilities, and partnerships that will successfully/equitably assist low-income persons in Regions 2, 3, and 4.

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ADDENDUM 1 FOR THE  
 NORTH CAROLINA DEPARTMENT OF ENVIRONMENTAL QUALITY  
 STATE ENERGY OFFICE  
 WEATHERIZATION ASSISTANCE PROGRAM  
 5 YR. BIPARTISAN INFRASTRUCTURE LAW (BIL)  
 REQUEST FOR PROPOSAL (RFP)  
 WEATHERIZATION OF SINGLE-FAMILY UNITS.

**Revised Deadline to Submit Proposals:** January 15, 2024

**Revisions for Available Service Regions Contained in Table 1:** Table 1 in Section V “*Funding Source*” is hereby replaced with the following. Previous submissions are still under consideration.

**Table 1.** Total 5-year Funding Distribution for Direct Weatherization Services by NC Region

Region	Program Operations	Admin	Health & Safety	Total 5-year Allocation	Anticipated Number of Weatherized Units	Status
1	\$2,132,760	\$284,700	\$533,190	\$2,950,651	266	Open
2	\$3,655,809	\$488,010	\$913,952	\$5,057,771	456	Open
3	\$7,739,504	\$1,033,139	\$1,934,876	\$10,707,519	966	Open
4	\$3,913,039	\$522,348	\$978,260	\$5,413,647	489	Open
5	\$11,161,893	\$1,489,991	\$2,790,473	\$15,442,357	1,394	Open
6	\$7,722,417	\$1,030,858	\$1,930,604	\$10,683,880	964	Open
8	\$10,592,424	\$1,413,973	\$2,648,106	\$14,654,502	1,323	Open





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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 of Single-Family Units**

RFP release date: 9:00 am Friday, July 28, 2023

RFP deadline to respond: 5:00 pm Friday, September 15, 2023

ALL VENDORS:

The enclosed packet contains a "REQUEST FOR PROPOSAL" for Weatherization of Single-Family Units. **This approach is being utilized for the 5 Yr. BIL funds only. This solicitation model does not affect the annual Weatherization program design, or the funding allocated to the agencies supporting that program.**

The proposal consists of the following documents:

**REQUEST FOR PROPOSAL**

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## I. Summary

The North Carolina Department of Environmental Quality (*NC DEQ*), State Energy Office, Weatherization Assistance Program, (*NC WAP*) is committed to ensuring affordable, just, and equitable access to energy. Through the program NC WAP, NC DEQ works to assist Low-to-Medium Income (*LMI*) residents in North Carolina (*income of  $\leq 200\%$  federal poverty level*) with energy efficiency upgrades to reduce their energy burden and improve home living conditions. To boost programmatic outcomes, WAP is working to build a more sustainable workforce, innovate the existing WAP, and surge the number of homes served. The NC WAP believes that persons in need can be served more effectively by the State if both federal and state funds are blended for home energy efficiency and essential health and safety renovations. For program success, the NC WAP envisions finding lead weatherization agencies for the 7 single family Weatherization Hubs in different regions of North Carolina. These lead weatherization agencies will participate in a local cooperative between local governments, home repair and community development organizations, aging related agencies, community social services, housing and development agencies, councils of governments, and other nonprofits.

## II. Background

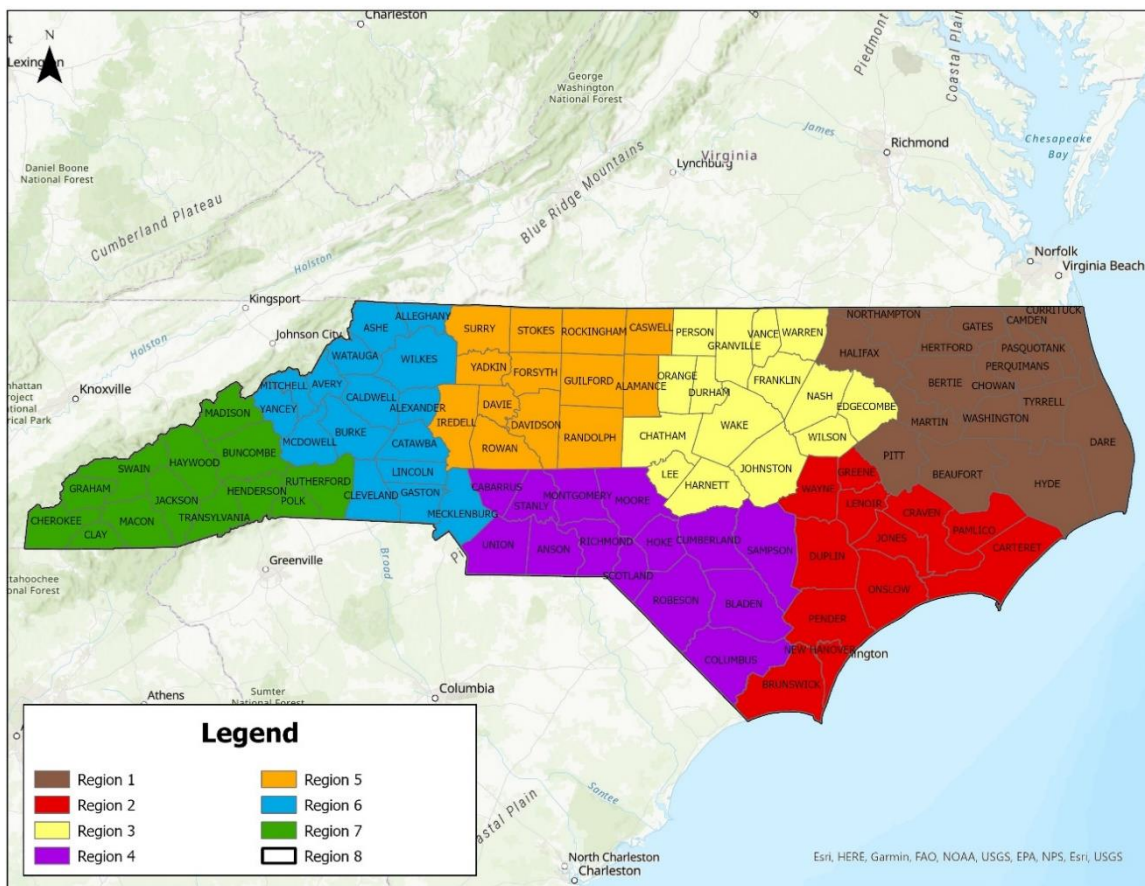
Low-income North Carolinians are faced with many multifaceted challenges including inflation, high energy and housing costs, and continued market impacts from the COVID-19 pandemic. The North Carolina Weatherization Assistance Program (*NC WAP*) aims to reduce these stressors by improving home energy efficiency, thereby fostering a healthier and more affordable life for North Carolina residents. Based on these initiatives, NC 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.

The purpose of NC WAP is to install energy conservation measures in the homes of income-eligible persons, especially homes occupied by the elderly, persons with disabilities, and children. Funds are applied to the most cost-effective conservation measures, which are determined by conducting an on-site energy audit of the dwelling. Energy conservation measures funded through



the program may range from air sealing and insulating single-family homes to replacing heating systems, windows, and doors. Weatherization assistance is eligible in all types of housing units, including both single and multifamily housing, manufactured housing, and group homes. To achieve a successful program, NC WAP plans to build a more sustainable weatherization workforce, improve and innovate the existing NC WAP, and surge the number of weatherized homes. The state of North Carolina aims to serve low-income persons, specifically those in disadvantaged communities (DACs) that could benefit from more energy efficient dwellings.

The NC WAP is in search of weatherization agencies for both single-family and multifamily units that will participate in a cooperative home repair approach.<sup>1</sup> The state has been divided into different regions that will be served by one collaborative hub (i.e., a *Weatherization Hub*) based on the geographic jurisdictions of North Carolina’s weatherization service providers (**Figure 1**). Participating agencies will receive free training in the collaborative home repair model to better serve low-income homeowners—this will include training of a unified intake process, collaborative case management process, and uniform program assessment strategies for services such as accessibility modifications, weatherization, home repair programs, and electrification assistance as needed.



**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

<sup>1</sup> SEO will follow 10 CFR 440.14 and 15 for the selection of weatherization service providers and corresponding regions.



multifamily homes.

### III. Statement of Need

The purpose of the federally funded NC WAP is to increase the energy efficiency of dwellings owned or occupied by low-income persons or to provide such persons with renewable energy systems or technologies, reduced total residential expenditures, and improve their health and safety, especially low-income persons who are particularly vulnerable such as the elderly, persons with disabilities, families with children, high residential energy users, and households with high energy burden. NC DEQ aims to identify weatherization agencies that are equipped to weatherize single family units within a region of North Carolina (Regions 1-7, Figure 1) using a collaborative approach. Participating agencies will receive free training in the collaborative model approach.

NC WAP intends to select the most qualified service provider(s) for a two-year contract with an option to extend contracts for additional program years. Initial contract periods will be for two years, contingent upon the outcomes of periodic performance evaluations.

Funding for the weatherization of single-family units is available through this funding mechanism over five years. Selected service provider(s) shall be required to service the entire region equitably and shall not discriminate. When no wait list is present, properties are to be assisted on a first come, first served basis.

### IV. RFP Timeline

RFP activity	Time and Date
RFP Posted	9:00 am Friday, July 28, 2023
RFP Questions by Service Provider(s) Due	5:00 pm Wednesday, August 2, 2023
RFP Answers Posted by NC DEQ	5:00 pm Friday, August 18, 2023
RFP Due	5:00 pm Friday, September 15, 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 Department of Energy (*DOE*) releasing specific guidance for NC 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 the NC WAP by elevating funding for the next five years. Federal BIL funding aligns with the North Carolina Clean Energy Plan (*CEP*) and will be utilized to help achieve the state's energy reduction goals of (1) decreasing electric power sector greenhouse gas emissions by 70% below 2005 levels by 2030 and (2) 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 NC 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), throughout all 100 counties of North Carolina. The NC WAP energy upgrades provide homeowners relief through energy savings and home improvements that support equitable health and safety for North Carolinians. The NC WAP anticipates that the ~\$89.7M BIL stimulus will aid over 6,000 households across the state. **\$69.783M has been reserved for direct weatherization services (Table 1).**

It is important to note that NC WAP 5 Yr. BIL funds will follow the DOE March 2022 [Administrative and Legal Requirement Document \(ALRD\)](#) PERIOD OF PERFORMANCE guidance. The \$69.783M will not be released as 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 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.

**Table 1.** Total 5-year Funding Distribution for Direct Weatherization Services by NC Region<sup>2</sup>

Region	Program Operations	Admin	Health & Safety	Total 5-year Allocation	Anticipated Number of Weatherized Units	Status
1	\$2,132,760	\$284,700	\$533,190	\$2,950,651	266	Awarded
2	\$3,655,809	\$488,010	\$913,952	\$5,057,771	456	Open
3	\$7,739,504	\$1,033,139	\$1,934,876	\$10,707,519	966	Open
4	\$3,913,039	\$522,348	\$978,260	\$5,413,647	489	Open
5	\$11,161,893	\$1,489,991	\$2,790,473	\$15,442,357	1,394	Open
6	\$7,722,417	\$1,030,858	\$1,930,604	\$10,683,880	964	Awarded
7	\$3,522,266	\$470,184	\$880,567	\$4,873,017	440	Awarded
8	\$10,592,424	\$1,413,973	\$2,648,106	\$14,654,502	1,323	Open
<b>Total</b>	<b>\$50,440,112</b>	<b>\$6,733,203</b>	<b>\$12,610,028</b>	<b>\$69,783,343</b>	<b>6,298</b>	

## VI. Contractor Qualifications

To qualify for implementation of contract activities Service Provider(s) must:

1. Be a Community Action Agency (CAA) or other public or nonprofit entity.
2. Have detailed knowledge of, and experience in, weatherization services, including performance of energy efficiency retrofits.
3. Be familiar with the NC WAP and have relations with weatherization related agencies in the state.
4. Be familiar with methods for blending federal, state, and local funding opportunities in

<sup>2</sup> The funding allocations were calculated using [U.S. DOE's Allocation Formula](#) that incorporates factors such as [heating/cooling degree days](#), [low-income population based on U.S. Census data \(S1702\)](#), and [residential energy burden based on U.S. DOE's LEAD tool](#). This methodology may be found in 10 CFR 440.10(3) and (4).





weatherization.

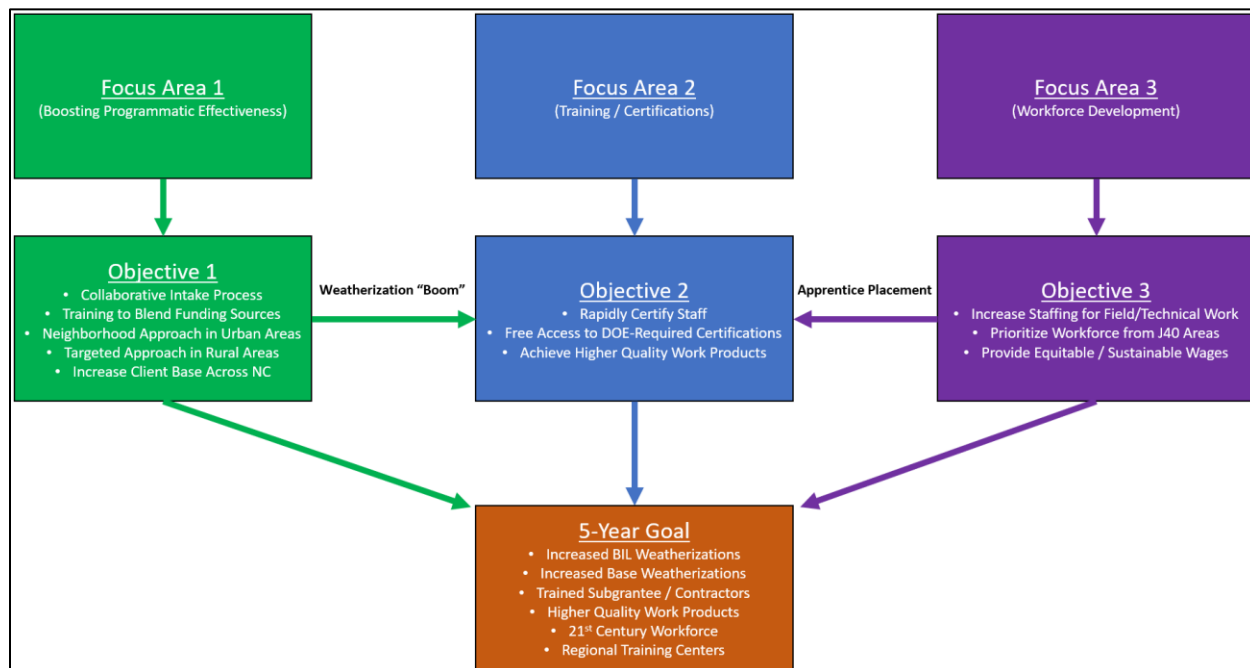
5. Demonstrate the ability to complete projects and serve all residents across the state of North Carolina.

## VII. Key Weatherization Focus Areas

NC WAP is working on addressing capacity building within the subgrantee network to expand services within the regions where weatherization services are most needed. To that end, NC WAP created three focus areas to bolster efforts in the 5-Year BIL Program. Successful applicants will incorporate strategies in their answers to collaborate with selected providers in the following three focus areas:

- 1) Focus Area 1 – Weatherization Collaborative Lead Agency
- 2) Focus Area 2 – Upgrades to Weatherization Training Program
- 3) Focus Area 3 – Weatherization Workforce Development Program

More information about the three focus areas may be found in Section 1.06 of the “*State of North Carolina Bipartisan Infrastructure Law Weatherization Assistance Plan*” that is housed on the NC WAP webpage: <https://www.deq.nc.gov/energy-climate/state-energy-office/weatherization-assistance-program>



**Figure 2.** North Carolina’s training and technical assistance approach for the BIL program.



## VIII. 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 anticipated single family weatherization services:

- Agency name(s), address(es), and technical lead(s).
- A description of the agency's experience and preparedness to implement weatherization services across the state of North Carolina.
- A description of recruitment strategies that will be utilized to identify single family units to weatherize throughout the state. How are units within disadvantaged communities and households with elderly, disabled, young children, high energy burden, and high energy users recruited? A specific plan should be developed for methods to reduce weatherization deferrals in the state. *Note: approximately 50% of income-eligible clients in North Carolina are deferred due to items such as general health/safety concerns, disrepair of mechanical or electrical systems, structural deficiencies, and severe mold/moisture problems.*
- A description of how your agency retains and advances a modern workforce in weatherization. Include how your agency will build upon these efforts.
- A list of weatherization contractors or related agency partners. Please describe how you and partners will implement both (1) energy efficient and (2) clean energy upgrades that assist in a more resilient energy grid.
- A list of metrics that will be collected for persons in single family units to be weatherized, including methods for keeping private and personal information safe.
- 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. *(Please note that participating in the apprentice program and placing apprentices within their organization will likely be a requirement under BIL funding.)*
- 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 DOE. At these Go/No-Go milestones, NC DEQ will evaluate project performance, schedule adherence, and contribution to the NC WAP goals and objectives.
- A detailed budget, including a line item for the number of single-family dwellings.
- Resumes of those who will manage the single-family unit weatherization program, including those who will lead relevant training sessions.
- Certificates of Insurance that document relevant coverage for weatherization services, the limits of liability and coverage dates of service provider(s) policies. All documents and coverage must be current.



## IX. Unit Eligibility

A dwelling unit is eligible for weatherization assistance if it is occupied by a family unit that meets the income guidelines set forth within this Weatherization Program Notice (*WPN*) and meets the building eligibility guidelines detailed in 10 CFR 440.22.

## X. Energy Audit Tool and Workforce Resources

As defined in the policy, computer modeling audit is to be used for the following building types:

- a. Single-family dwellings up to 4-plexes, and
- b. Mobile homes

Energy Auditors and Quality Control Inspectors (*QCI*) will be required to have proper certification for (1) single-family dwellings up to 4-plexes; and (2) mobile homes. This includes training on energy auditing software titled, “*Weatherization Assistant*” (*i.e.*, *National Energy Audit Tool (NEAT)*); and *Manufactured Home Energy Audit (MHEA)*) and the Building Performance Institute (BPI) QCI certification.

Computer energy audits require a physical inspection of the home, specific diagnostic tests, and proper data input into the software program. An energy profile of the existing home is compared to a set of improvements recommended for installation. Each measure is then evaluated, and a report is generated with the cost-effectiveness of each measure listed by Savings to Investment Ratio (*SIR*) greater than 1.

Service Providers are required to have staff members certified in the use of residential energy modeling software. If a modeling analysis is completed by a non-certified user, it must be reviewed by a certified user.

DOE developed and maintains the [Standard Work Specifications \(SWS\)](#) for home energy upgrades to ensure that energy efficiency upgrades are effective, durable, and safe. The “*Single Family Site-Build Housing*” and “*Manufactured Housing*” Job Task Analyses (*JTA*’s) define the knowledge, skills, and abilities (KSAs) that practitioners use to perform jobs effectively and safely. The *JTA*’s provide a foundation for developing high-quality training and credentialing programs. In addition, DOE supported the development of single family and manufactured housing energy auditing tools to advance the NC WAP’s ability to address these building types. For example, DOE also supported the development of an optional priority list for single family and manufactured housing units in “*Climate Region 2*” via [WPN 22-8](#). At the time of posting this RFP, the optional priority lists are not approved in the State of North Carolina; however, NC WAP is undergoing the process for them to be an approved option for the 5-Year BIL Program. NC WAP will share additional information with Subgrantees regarding the addition of other energy audit tools and requirements in a future memorandum.

## XI. 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.

Weatherization of single-family units should align with Justice40 Initiatives. NC DEQ has created a map of the top-priority, overlapping places to weatherize (*TOP-W*) in NC. The training agency should prioritize weatherization of single-family units within the defined geographic areas.

## **XII. 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 Freedom of Information Act. The explanation and rationale must be stated in terms of (1) the prospective harm to the competitive position of the proposer that would result if the identified information were to be released and (2) the reasons why the information is legally exempt.

## **XIII. Questions about the RFP**

Eligible Service Provider(s) 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, Wednesday, August 2, 2023.

NC DEQ will not respond to verbal questions. All questions received by 5:00 p.m. Eastern Standard Time, Wednesday, August 2, 2023, will be answered in writing; NC DEQ's 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. Friday, August 18, 2023.

## **XIV. 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. NC WAP 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 15, 2023. Proposals may be [submitted through this application portal](#). Proposals shall be submitted in PDF format.

## **XV. Evaluation of Proposals**

NC DEQ's WAP 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 service provider. Further, NC DEQ reserves the right to choose any contractor – regardless of score.



<b>Evaluation Criteria</b>	<b>Points</b>
<b>Weatherization Experience &amp; Preparedness</b>	10
<b>Recruitment Strategies to ID Single Family Units to be weatherized and Plan to Reduce Deferrals</b>	20
<b>Leverages Partners in Implementing EE and Clean Energy Upgrades</b>	20
<b>Workforce Development Plan &amp; J40 Initiatives</b>	25
<b>Metrics and Keeping PII safe</b>	7
<b>Report Project Progress and Setbacks</b>	10
<b>ID of Go/No-Go Milestones</b>	8
<b>Total Score</b>	<b>100</b>

By rule of the Code of Federal Regulations (*CFR*) [10 CFR § 440.15](#), preference is given to any CAA or other public or nonprofit entity which has, or is currently administering, an effective program under this part or under title II of the Economic Opportunity Act of 1964, with program effectiveness evaluated by consideration of factors including, but not necessarily limited to, the following:

- a. The extent to which the past or current program achieved or is achieving weatherization goals in a timely fashion;
- b. The quality of work performed by the subgrantee;
- c. The number, qualifications, and experience of the staff members of the subgrantee; and
- d. The ability of the subgrantee to secure volunteers, training participants, public service employment workers, and other Federal or State training programs.

## **XVI. 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.

## **XVII. Build America, Buy America**

The Build America, Buy America (*BABA*) provisions of the Bipartisan Infrastructure Law (*BIL*) establish a domestic content procurement preference for all federal financial assistance obligated for infrastructure projects after May 14, 2022. [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*”

[BABA requires](#) the following:

- a) Iron and Steel Products
  - All manufacturing processes must occur in the United States.
- b) Manufactured Products
  - All manufactured products must be produced in the United States; and
  - 55 percent or more of the total cost of components must be mined, produced, or manufactured in the United States.



- c) Construction Materials
  - o All manufacturing processes must occur in the United States.

### **XVIII. Reporting Requirements for Accepted Projects**

Contingent on use of BIL funding, any selected entities will be mandated to follow the most up-to-date DOE and NC WAP program and reporting requirements. All grant awards made under this Program shall comply with applicable law and regulations including, but not limited to, the NC WAP regulations contained in 10 CFR 440, the Uniform Guidance at 2 CFR Part 200 as adopted by DOE at 2 CFR Part 910, and the Bipartisan Infrastructure Law (*Infrastructure Investment and Jobs Act*), Public Law 117-58. 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 conducted in accordance with 2 CFR Part 200, Subpart D & F.
- 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 requirements. Funds shall not be expended for the items or services other than those listed in 10 CFR 440.18. T&TA funds cannot be used to purchase equipment used in the day-to-day installation of weatherization measures. Where a need exists to purchase tools and equipment Subgrantees should use “*Program Operations*” funds.
- 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.
- Adjusted Average Cost Per Dwelling Unit (*ACPU*): *ACPU* expenditure of financial assistance provided under WAP for labor, weatherization materials, and related matters cannot exceed \$6,500, as adjusted (*see, 10 CFR §440.18(a) and (c)*). The adjusted average for BIL grants is determined by using the percentage increase in the Consumer Price Index (*CPI*) (*all items, United States city average*) for FY 2021 or 3 percent, whichever is less. The percentage increase in the *CPI* for the previous 12-month period (*September 2020 – September 2021*) was 5.4%. Therefore, the adjusted average expenditure limit for at the time of the BIL grants is \$8,009. This average includes units computed in a multifamily building of 5 units or greater.

Each Subgrantee shall submit certified and timely reports to NC 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.

- I. Required reporting documents for a complete monthly billing package include:
  - a. Purchase Order [*NC WAP Template*]
    - o Signature, Date, and Title of two separate Management Staff.



- b. Invoice *[NC WAP Template]*
    - Signature, Date, and Title of two separate Management Staff.
  - c. 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.
  - d. 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 educational materials, subcontractor costs, general ledgers, payroll reports, etc.*),
      - 2. Subgrantee writes “*Subgrantee Project ID*” on receipts and how much was charged to DOE funds.
  - e. Building Materials Amount
  - f. Checkbox for whether purchases align with NC WAP’s “*Build America, Buy America*” guidance.
  - g. Training Amount
  - h. Project Total for Billing Cycle
  - i. Signature, Date, and Title of Financial Director.
- II. Reporting Format – NC DEQ has provided all Subgrantees with online access to software for the purpose of reporting weatherization activities. All weatherization Subgrantees are required to use program software for reporting purposes.
- III. NC WAP cannot approve an incomplete billing package. Expenses will not be reimbursed without providing all items listed above on a monthly basis (*regardless of whether expenses were made*).



## **XIX. Evaluation Process and Scoring – Single Family**

Each application will be assessed to the degree in which applications meet the following evaluation criteria:

- (1) Applicant’s experience and preparedness to implement weatherization services across the state of North Carolina,
- (2) Recruitment strategies to identify single family unit to be weatherized, specifically how will units within disadvantaged communities (*DACs*) and households with at risk population be recruited and a plan to reduce weatherization deferrals,
- (3) Retention and advancement of a modern workforce in weatherization and how the plan aligns with Justice 40 (*J40*) Initiatives,
- (4) How the agency leverages partners in implementing energy efficient and clean energy upgrades that assist in a more resilient energy grid,
- (5) Metrics collected for persons in single family homes and methods for keeping private and personal information safe,
- (6) The plan reporting project progress and any project setbacks, and,
- (7) Identification of Go/No-Go milestones in the project.

Each criterion will be scored using the options provided in **Table 1-1** by a panel. The application’s final qualitative score for each criterion will be calculated by averaging the qualitative scores from each panelist.

Please note that answering every question, while informative, will not necessarily guarantee an “*Exceeds*” score. Finally, prompts included here are by no means mutually exclusive or exhaustive; any additional information to support the merit of the application is welcome.

The following information is intended for guidance only and is not a request for information. The following template is only intended to help the reader understand the grant application process.





**Table 1-1: Criteria Scoring Options**

Scoring Option	Description
Not at all	The application does not address the criterion at all.
Minimally	The application addresses the criterion, but information in the application may be confusing, unclear, and/or incorrect. The degree to which the application demonstrates the criterion is minimal, and references to the criterion do not include substantive information.
Partially	The application partially addresses the criterion, but the application may lack clarity and/or strong support, have some minor inconsistencies, or not address all components of the criterion. The degree to which the application demonstrates the criterion has been met is mediocre.
Mostly	Although the application may include a few minor inconsistencies or areas that need more clarity, there is strong support for most components of the criterion. The degree to which the application demonstrates the criterion has been met is acceptable.
Entirely	The application is clear, concise, and complete; provides examples; and is supported by data. It addresses all components of the criterion and may have a particularly compelling narrative. The degree to which the application demonstrates the criterion has been met is excellent.
Exceeds	In addition to addressing all components of the criterion, being clear, concise, complete, and supported by data, the application articulates the impact of the project in catalyzing broader efforts (such as project type awareness) as they relate to the criterion. The degree to which the application demonstrates the criterion has been met is beyond excellent.

The North Carolina State Energy Office, Weatherization Assistance Program (*NC WAP*) will apply the scoring options listed in **Table 1-1** to all seven qualitative criteria. Note that point values vary among each criterion. The graded scoring and point scales for each criterion are included later in this document.



Tip: If you cite an attachment within the application, include the attachment name and location within the description and/or narrative, and be sure to implement proper naming conventions and ensure all attachments are relevant.

To achieve maximum points, applicants are encouraged to delineate clearly and completely the following:

- Implementation Measures
- Population Impacted
- Community Engagement and Other Outreach Activities
- Leveraging Partners

**Evaluation Criterion 1: Applicant's experience and preparedness to implement weatherization services across the state of North Carolina (10 possible points)**

The score received for Criterion 1 will depend upon how well the application details the following elements: (1) the organization’s experience, (2) knowledge of rules and regulations of weatherization services, (3) the organization’s proficiency with utilizing the United States Department of Energy (DOE) approved energy audit tools (i.e., *Weatherization Assistant [NEAT / MHEA]*), and (4) the degree to which applicants’ program(s) have been successful in producing desired results in weatherization services.

Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	2	4	6	8	10

**Evaluation Criterion 2: A detailed plan to address weatherization deferrals, Recruitment strategies to identify single family units to be weatherized, specifically how will units within disadvantaged communities and households with at risk population be recruited (20 possible points)**

The score received for Criterion 2 will depend upon how well the application details how the project will: (1) address weatherization deferrals, and (2) reach DACs.

- If the application does not include a reference or incorporate any of the Key Weatherization Focus Areas, then the highest point allotment available is Partially. Application(s) that clearly state the approach to collaborate with Focus Areas 1, 2 or 3 can the proposed project is benefiting a DAC can score Mostly or Higher.

Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	4	8	12	16	20



### Evaluation Criterion 3: How the agency leverages partners in implementing energy efficient and clean energy upgrades that assist in a more resilient energy grid (20 possible points)

Leveraging Partners allows applicants to access complementary strengths from neighboring communities, states, the federal government, and non-profit and private partners. This potentially helps the applicant from a cost basis and serves the local community's greater good.

The score received for Criterion 3 will depend upon how well the application incorporates: (1) partnerships (*e.g., state, territory, Tribal, private, district, local community*) that will ensure the project meets community needs, (2) an explanation of how these partnerships benefit DACs, (3) timeline(s) for implementation; and (4) an explanation on the anticipated outcome of those partnerships (*e.g., leveraging resources such as financial, material, and educational resources, coordinating multi-jurisdictional projects, heightened focus on equity related issues*).

*A disadvantaged community may be characterized by variables including, but not limited to: low income, high and/or persistent poverty, high unemployment and underemployment, high housing cost burden and substandard housing, distressed neighborhoods, disproportionate environmental burden and high cumulative impacts, disproportionate climate impacts, high energy cost burden and low energy access, and all geographic areas within Tribal jurisdictions.*

If a population impacted as demonstrated by the application does not include a DAC, then the highest point allotment available is Partially. Application(s) that clearly state the proposed project is benefiting a DAC can score Mostly or Higher.

*Additional considerations for completing the application.*

- What partners were involved in the project design? How did partners contribute to the application? What partners will contribute to the implementation of the project? Partnerships can take many different forms. For example, partners may contribute financially, support and promote the proposed project, help generate community-wide awareness of the risks the proposal is designed to address, etc.
- To what extent were non-governmental organizations, including those organizations that represent disadvantaged groups, universities, or other government entities consulted for advice or assistance? How has collaboration with surrounding jurisdictions supported project development?
- To what extent have other programs or funding sources been leveraged for the project?
- What community groups will participate in this project? What potential exists for partnerships to continue beyond implementation of the project?

Tip: NC WAP recommends clearly describing disadvantaged communities within the narrative and uploading documentation relevant to disadvantaged communities outlined in the application.

Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	4	8	12	16	20



### Evaluation Criterion 4: Retention and advancement of a modern workforce in weatherization and how the plan aligns with Justice 40 Initiatives (25 possible points)

The score received for Criterion 4 will depend upon how well the application describes: (1) how the organization’s existing employees will be retained, trained, and have opportunities for advancement, (*a career advancement plan*), (2) a detailed plan to support apprentices, living wages and J40 Initiatives.

- Are strong labor standards incorporated? For example, the use of project labor agreements (PLAs), requiring workers to be paid wages at or above the prevailing rate; use of local hire provisions; using a directly employed workforce (*as opposed to a subcontracted workforce*); use of an appropriately skilled workforce, (*e.g., through apprenticeships or other joint labor-management training programs that serve all workers, particularly those underrepresented or historically excluded*); and use of an appropriately credentialed workforce (*i.e., satisfying requirements for appropriate and relevant pre-existing occupational training, certification, and licensure*).
- If the application does not include a reference or incorporate any of the Key Weatherization Focus Areas, then the highest point allotment available is Partially. Application(s) that clearly state the approach to collaborate with focus areas 1, 2 or 3 can the proposed project is benefiting a DAC can score Mostly or Higher.

Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	5	10	15	20	25

### Evaluation Criterion 5: Metrics collected for persons in single family homes and methods for keeping private and personal information safe, (7 possible points)

The score received for Criterion 5 will depend upon how well the application describes: (1) what and how information is collected on people in the household based on the “*State of North Carolina Bipartisan Infrastructure Law Weatherization Assistance Plan*” that is housed on the NC WAP webpage: <https://www.deq.nc.gov/energy-climate/state-energy-office/weatherization-assistance-program>, and (2) the policies and procedures of keeping private and personal information safe.

Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	1.4	2.8	4.2	5.6	7



### Evaluation Criterion 6: The plan reporting project progress and any project setbacks (10 possible points)

The score received for Criterion 6 will depend upon how well the application: (1) provides the plan for their reporting and project progress timelines, (2) articulates project process and setbacks, and (3) contains contingency plans for how to handle breakdowns of project setbacks.

Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	2	4	6	8	10

### Evaluation Criterion 7: Identification of Go/No-Go milestones in the project (8 possible points)

The score received for Criterion 7 will depend upon how well the application: (1) articulates a milestone plan complete with detailed timeline and progress reports; (2) justifies initiating the project; (3) supports the project's feasibility within the allotted timeframe; (4) contains resources to implement the project plan; (5) identifies alternative solutions to potential obstacles; and (6) determines the methods to choose alternative solutions to potential obstacles.

If the application does not include a reference or incorporate any of the Key Weatherization Focus Areas, then the highest point allotment available is Partially. Application(s) that clearly state the approach to collaborate with focus areas 1, 2 or 3 can the proposed project is benefiting a DAC can score Mostly or Higher.

Not at all	Minimally	Partially	Mostly	Entirely	Exceeds
0	1.6	3.2	4.8	6.4	8

The following information is intended for guidance only and is not a request for information. The following template is only intended to help the reader understand the grant application process.



**Response to the NC  
Weatherization Assistance  
Program's Five-Year Bipartisan  
Infrastructure Law Request for  
Proposal for Weatherization of  
Single-Family Units**



advanced  
energy

## **AGENCY INFORMATION**

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## **PRIMARY CONTACTS**

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## ADVANCED ENERGY'S EXPERIENCE

North Carolina Advanced Energy Corporation (Advanced Energy or AE) was founded in 1980 through a collaboration between the North Carolina Utilities Commission and the electric utilities in the state to investigate and implement new technologies for energy efficiency, conservation, distributed generation, and load management.

Advanced Energy seeks to fulfill services under the North Carolina Department of Environmental Quality, State Energy Office, Weatherization Assistance Program, 5 Year Bipartisan Infrastructure Law, Weatherization of Single-Family Units for Regions 2, 3, and 4.

Advanced Energy boasts over two decades of experience in implementing weatherization services. Additionally, our team has a deep understanding of energy efficiency, clean energy, and we have successfully developed and managed numerous programs and projects.

In the early 2010s, we worked with the National Renewable Energy Laboratory (NREL), U.S. Department of Energy (DOE) and dozens of experts to develop the Weatherization and Workforce Guidelines for Home Energy Upgrades to support the home energy retrofit industry. The guidelines put in place Standard Work Specifications that are still in use today by the DOE's Weatherization Assistance Program.

Spurred in large part by the devastation of Hurricane Floyd we launched the only affordable housing guarantee program in the nation, SystemVision, in 2001. We have been fortunate to collaborate with the North Carolina Housing Finance Agency (NCHFA) and a network of nonprofit builders, raters, and volunteers. To date, SystemVision has helped construct more than 5,500 high-performance, energy efficient, affordable homes in North Carolina.

Advanced Energy has a history of successfully implementing federal funding to assist Low-to-Medium Income (LMI) residents in North Carolina. In 2021, AE was awarded \$250,000 in Coronavirus Aid, Relief, and Economic Security (CARES) Act funding, and \$703,500 in American Recovery Plan Act (ARPA) funding to install heating, ventilation, and air conditioning (HVAC) systems, water heaters and solar systems for 228 LMI residents. All installations were completed successfully within time and budget. These previous projects and a long history of partnering with key stakeholders position AE to successfully implement this Project.

As summarized in Table 1, AE’s experience and preparedness to implement weatherization (WAP) across the state of North Carolina aligns well with the qualifications the request for proposal is seeking.

<b>Contractor Qualifications</b>	<b>AE Experience</b>
1. Be a Community Action Agency or other public or nonprofit entity.	AE is a 501c3 non-profit founded in 1980
2. Have detailed knowledge of, and experience in, weatherization services, including performance of energy efficiency retrofits.	<p>Launched and managed the only affordable housing guarantee program in the nation, SystemVision.</p> <p>Provided comprehensive energy efficiency retrofit and renewable services for LMI households in North Carolina through both ARPA and CARES Act funding within the last 5 years.</p>
3. Be familiar with the NC WAP and have relations with weatherization related agencies in the state.	<p>In the early 2010s, we worked with NREL, DOE, and dozens of experts to develop the Weatherization and Workforce Guidelines for Home Energy Upgrades to support the home energy retrofit industry. The guidelines put in place Standard Work Specifications that are still in use today by the DOE’s Weatherization Assistance Program.</p>
4. Be familiar with methods for blending federal, state, and local funding opportunities in weatherization.	<p>AE has relationships with multiple partners that will be leveraged to increase the amount of billable services to eligible households without increased NC DEQ cost-share. Where possible, AE will leverage funding to increase average per household expenditure from long-standing partners including but not limited to: Utility programs and foundations; NCHFA; Lumbee Tribe of</p>

	North Carolina; Local home repair programs; and DOE Solar for All (application pending).
5. Demonstrate the ability to complete projects and serve all residents across the state of North Carolina.	See CARES, ARPA, SystemVision experiences

Table 1: Advanced Energy’s Qualifications under Direct WAP Services – Single Family RFP

**RECRUITMENT STRATEGIES**

Advanced Energy will employ strategic recruitment efforts designed to reach diverse and qualified single-family households across Regions 2, 3, and 4. Emphasis will be placed on Disadvantaged Communities (DACs) and households facing specific challenges such as those with elderly, disabled individuals, young children, high energy burdens, and high energy users. Our recruitment strategies will leverage partnerships with North Carolina’s Electric Cooperatives, Duke Energy Carolinas (Duke Energy), and community-based organizations.

Advanced Energy has a multi-faceted approach to identify single-family homes that qualify for weatherization. Our strategy entails leveraging cutting-edge tools, partnerships, and community engagement to ensure we reach the most in-need households. This concerted approach ensures we effectively reach and support diverse communities through the following strategic recruitment activities.

**Use of Advanced Mapping Tools**

At the core of our identification process is the use of advanced mapping tools. We utilize DACs information from the Climate and Economic Justice Screening Tool (CEJST 1.0) and the Low-Income Energy Affordability Data (LEAD) tool. These tools allow us to pinpoint disadvantaged communities and qualifying units effectively.

**Partnerships with Local Electric Co-ops and Utilities**

Upon targeting DACs, AE will collaborate with local electric co-ops and Duke Energy to create a referral mechanism for high-need homes that could benefit from weatherization. The electric co-ops have agreed to personally refer homeowners to AE for WAP services. This referral adds a layer of trust to the program, facilitating our ability to target homes most in need in DACs. We successfully utilized this approach to

meet our goal of enrolling qualified candidates to receive comprehensive energy efficiency retrofit and renewable services in the ARPA and CARES work.

### Community Engagement

Recognizing that our local community partners are intimately familiar with the areas they serve, we will leverage their expertise to help identify potential homeowners for WAP assistance. This includes the Lumbee Tribe of North Carolina, other tribal communities, churches, local CBOs, and government agencies. Advanced Energy is exploring mechanisms to expand its recruitment strategy by deepening its relationships with local CBOs. Table 2 outlines potential recruitment efforts that can be leveraged by local CBOs; as part of its 6-month ramp up plan, expanded recruitment protocols will be finalized and agreed upon by all participating CBOs.

<b>Potential Local Recruitment Strategies</b>	<b>Description</b>
Revised Intake Forms	Work with local organizations to revise their individual intake forms to capture essential data regarding energy bills in community settings such as schools, probation offices, health clinics, and legal aid firms as an initial screening tool to identify eligible participants.
Advertising for Services	Distribute flyers advertising the services (along with a dedicated online intake form website) in local food bank bags, school supply bags, and energy bill mailings.
Advertising in Local Church Bulletins and Senior Centers	Promote the weatherization services in local church bulletins and senior centers to reach a broader audience within the community.

*Table 2: Potential Local Recruitment Strategies*

### Streamlined Application Process

Upon referral, interested participants must complete an application, also known as our “intake form” to determine if they are qualified. To simplify the application process, we have developed an online intake form that can be easily accessed by the applicant, electric utility staff, or CBOs providing assistance. This digital approach aligns with AE's commitment to being a paper-free organization. This allows us to potentially carry all

necessary data on a tablet, reducing the need for physical paperwork. This can increase the number of applications submitted exponentially (teams can go into communities and host “intake events”). However, in remote areas where connectivity may be an issue, we could leverage electric co-op offices as secure computer systems, or “landing pads,” for paper forms.

## **PLAN FOR REDUCING WEATHERIZATION DEFERRALS**

Advanced Energy is committed to reducing weatherization deferrals. To achieve this, we have developed a comprehensive plan that leverages a central platform and coordinates additional funding sources, partners, and program management.

Advanced Energy will offer a comprehensive approach for program delivery to address deferrals, health and safety barriers, weatherization, energy efficiency, and renewable energy in a “one stop shop” program for eligible households. During the ramp-up period, identification and procurement of a Client System Management (CSM) tool will be completed, along with the implementation of additional privacy protocols as necessary. This tool will serve as the central database to identify and braid funds from other programs to get the homes ready for weatherization. Advanced Energy will establish regular communication check-ins on deferrals, potentially utilizing shared resources like the CSM or a dedicated portal (e.g., SharePoint) that alerts the team. This will ensure a secure, efficient, and coordinated approach to our weatherization efforts.

### **Leveraging Funding Programs**

Advanced Energy will partner with NCHFA, Duke Energy, North Carolina’s Electric Cooperatives, the Lumbee Tribe of North Carolina, government agencies, and other local organizations, to leverage their respective funding programs for repairs, rehabilitation, health and safety upgrades, and supplemental energy efficiency and renewable energy installs. This collaborative approach also ensures comprehensive support for the households we serve.

To decrease deferrals and increase completed units as much as possible, we will braid various funding sources from our partners and programs listed in Table 3.

<b>Deferral Partner Program</b>	<b>Role and Resources to be Provided</b>
NCHFA Urgent Repair Program	Partners with nonprofits, local governments, and regional councils of government to finance emergency repairs through deferred, forgiven loans up to \$10,000. Serves low-income households with special needs.
NCHFA Essential Single-Family Rehabilitation Program	Provides substantial rehabilitation to homes owned and occupied by households with one or more elderly or disabled full-time members.
Lumbee Tribe of North Carolina	Provides services to repair (or replace) existing, sub-standard housing for qualified, low-income homeowners.
Duke Energy Residential Income-Qualified EE and WAP Assistance Program	Provides financial assistance to income-qualified customers to implement WAP and energy efficiency measures in their homes to reduce energy usage.
Habitat for Humanity	Offers support in home repair and rehabilitation.
DOE Energy Readiness Funds	Provides funds to supplement weatherization costs and increase readiness for weatherization.
Local home repair programs	Offers valuable resources for necessary home repairs before weatherization.
NC Clean Energy Fund	Provides financial resources to increase energy efficiency in homes.

*Table 3: Partner Programs to Reduce Deferrals and Supplement WAP Measures*

Additionally, Advanced Energy is part of the Energize NC coalition, led by the NCDEQ, SEO, which applied for the US EPA’s Solar for All funding program to expand the number of low-income and disadvantaged communities primed for residential solar investment. If awarded, Advanced Energy can leverage this funding to repair or replace roofs and include solar installations in homes targeted for WAP services.

Advanced Energy has designed referral and deferral mitigation processes to engage a substantial number of potential participants, aiding the NC DEQ in achieving its BIL metrics. The goal is to significantly cut down weatherization deferrals and ensure maximum eligible households benefit from energy-efficient upgrades.

## **WORKFORCE DEVELOPMENT PLAN**

Advanced Energy strives to provide competitive salaries and benefits aligned with Justice 40 initiatives. Our benefits package includes flexible work schedules, various types of leave (holidays, vacation, comp, sick, child bonding, medical, bereavement, military), and insurance coverages (medical, dental, vision, life and AD&D, short- and long-term disability, and long-term care). We also offer 403b retirement accounts, flexible spending accounts for health care and dependent care.

Advanced Energy is committed to fostering, cultivating and preserving a culture of diversity, equity and inclusion. Our staff is the most valuable resource we have, and we appreciate that our employees come from varied backgrounds, cultures and experiences. By providing a supportive and respectful environment that promotes creativity and collaboration, Advanced Energy makes a lasting, positive difference in the work we do.

Advanced Energy is proud to be an Equal Opportunity/Affirmative Action Employer, underscoring our commitment to fair and equal employment opportunities for all. All employment decisions are based on job-related requirements, without regard to race, color, religion, sexual orientation, gender identity, national origin, age, disability, veteran status, or any other protected statuses under federal, state, or local laws.

Advanced Energy will continue equitable workforce practices and will actively contribute to Justice40 initiatives by promoting equity, diversity, and training opportunities within the energy sector. We believe that offering jobs with competitive wages and benefits ensures a sustainable and supportive work environment that aligns with the principles of Justice40.

### **Local Job Creation**

We plan to open offices in each of the three regions, potentially coworking with electric co-ops and other partners. We will hire new staff for the offices with talent from within the communities the team will serve. As part of this Project, Advanced Energy will create at least twenty-one full-time positions in the 3 regions over the period of performance (see Table 7 below).

<b>Job Title</b>	<b>Job Description</b>
Project Director (1.0 FTE)	<ul style="list-style-type: none"> <li>- Responsible for providing strategic and operational direction for the project in all three regions</li> <li>- Ensure federal, state, and local requirements are met</li> <li>- Manage staff and contractors</li> <li>- Ensure staff are adequately trained to deal with a vulnerable population</li> <li>- Build team that values diversity and shows respect to clients</li> </ul>
Fiscal and Information Systems Manager (1.0 FTE)	<ul style="list-style-type: none"> <li>- Responsible for strategic, financial, and information systems oversight for the project in all three regions to ensure compliance with state and federal regulations and adherence to best practices</li> <li>- Ensure IT Security Protocols are in place and adhered to</li> <li>- Ensure clear reporting and customer data entry structures throughout the project</li> <li>- Oversee the budget</li> <li>- Confirm that program dollars spent are allowable</li> <li>- Work with quality assurance managers and project team members to account for funds used on weatherization jobs</li> <li>- Ensure the regional offices stay on top of their spending to complete projects on time and within budget</li> </ul>
Quality Assurance Manager, Technical Supervisor (3.0 FTE)	<ul style="list-style-type: none"> <li>- Oversee the day-to-day operations of the project and field staff</li> <li>- Ensure work performed complies with state, federal, and local requirements</li> <li>- Ensure the QCI reviews energy models and verifies that all work is installed to quality standards</li> <li>- Help identify the source of work quality issues, develop corrective action plans, and monitor for improvement</li> <li>- Ensure job files are complete and ready for monitoring visit</li> <li>- Provide mentorship and training to Field Technician II and I as needed and required</li> </ul>
Field Technician II (4)	<ul style="list-style-type: none"> <li>- Perform key weatherization production tasks, such as conducting home energy assessments, home inspections, customer management system file entry, and communicating with clients and contractors</li> <li>- Prepare work write-ups and detailed cost estimates for WAP measures</li> <li>- Provide mentorship and training to Field Technician I as needed and required</li> <li>- Attend training as needed and required</li> </ul>
Field Technician I (5)	<ul style="list-style-type: none"> <li>- Perform key weatherization production tasks, such as conducting home energy assessments, home inspections, customer management system file entry, and communicating with clients and contractors</li> </ul>



	<ul style="list-style-type: none"> <li>- Attend training as needed and required</li> </ul>
Project Manager (4.0 FTE)	<ul style="list-style-type: none"> <li>- Coordinate intake events and appointments</li> <li>- Ensure accurate entries of client data in the WAP database</li> <li>- Establish, document, track, and adhere to project timelines, budgets, and tasks</li> <li>- Manage and coordinate contracts and scopes of work for subcontractors and other external contracts</li> <li>- Coordinate WAP services with the project team and contractors</li> <li>- Prepares schedules and reports</li> <li>- Attend training as needed and required</li> </ul>
Administrative Assistant III (3.0 FTE)	<ul style="list-style-type: none"> <li>- Help coordinate intake events and appointments</li> <li>- Complete accurate entries of client data in the WAP database</li> <li>- Maintain client data and proof of income in an organized and protected manner</li> <li>- Order supplies and equipment and schedule maintenance activities</li> <li>- Attending training as needed and required</li> </ul>

Table 4: New Local Jobs Created

Advanced Energy will take up to 6 months to hire and train local staff in the regional office positions. We intend to leverage K-12, community college, and university programs such as ApprenticeshipNC and STEPs4GROWTH for recruitment.

The existing management and technical team at AE will be involved in hiring, program design, and implementation during the ramp-up period and also provide strategic direction and support over the period of performance.

**Training and Development**

Advanced Energy is dedicated to fostering a work environment that encourages professional growth and development. All new employees will enroll in applicable NC WAP training (Focus Ares 2) for their role to learn the collaborative home repair model and further enhance their knowledge, skills, and abilities. On the job, they will work on teams that promote idea sharing and challenge them to learn and expand their expertise. We always encourage staff to attend additional training, conferences for peer learning, and professional development opportunities.

**Local Contracted Labor**

Local contracted labor will be used to implement weatherization measures. It is anticipated that up to at least 100 short-term labor jobs could be created, expanded, or engaged within all three regions of this Project. Below is a list of potential

weatherization contractors or related partners that may provide services to eligible clients:

- AirServ Heating & Air Conditioning
- Boer Brothers Heating and Cooling
- Byrum Heating and Air Conditioning
- Carolina Weatherization
- Custom Comfort Cooling and Heating
- D&E Heating and Cooling
- Duggins Mechanical
- Jimmy’s Plumbing and Repair
- Webb Heating and Air Conditioning
- Wimpy’s Commercial Refrigeration Heating and Air Conditioning

Advanced Energy will solicit bids from qualified contractors through a public “Request for Bid.” We will prioritize selecting local, unionized contractors with inclusive labor practices and fair wages during the procurement process. Moreover, preference will be given to minority business enterprises (MBEs), including women and veteran-owned businesses, and contractors with Diversity, Equity, Inclusion, and Accessibility (DEIA) policies.

Advanced Energy will also educate contractors on Davis Bacon, Build America Buy America (BABA), and other regulations and requirements during the solicitation and contracting process.

All contractors will have the opportunity to be part of a labor union, ensuring they receive fair wages and benefits. By choosing local unionized contractors, we are not only supporting our community but also promoting decent work conditions.

By implementing these strategies, Advanced Energy aims to create a workforce that is not only diverse and inclusive, but also well-trained and fairly compensated. We believe that these initiatives will help us deliver superior services to our clients while also contributing positively to the local communities.

## **IMPLEMENTATION STRATEGY**

Advanced Energy will employ a systematic “one-stop-shop” approach to implement energy efficient and clean energy upgrades. During the ramp-up period, identification and procurement of a Client System Management (CSM) tool will be completed. This tool will serve as the central database to identify and braid funds from other programs

to get the eligible homes ready for WAP or install additional WAP and energy efficiency measures. This centralized effort will ensure a secure, efficient, and coordinated approach to our weatherization efforts.

### **Referral Process**

In partnership with local electric co-ops and Duke Energy, we established a robust referral process. Using high energy usage and billing history data from utilities, we identify potential beneficiaries for our program. AE then will conduct targeted outreach to these individuals, ensuring they are aware of the benefits and application process. See Recruitment Strategies section above for more information.

### **Efficient Intake System**

We've streamlined our intake system with an online application process in addition to paper applications. Applicants can apply at their convenience, with AE or the respective co-op or CBO offering assistance as needed. We will also host intake events in partnership with the local electric co-ops and CBOs. The application will collect required information, including but not limited to, proof of income eligibility, owner's name and address/contact information and utility supplier(s).

### **Comprehensive Home Assessment**

Advanced Energy will conduct physical home inspections, comprehensive energy audits, and health and safety testing. The information collected during the audit will be entered into the NCDEQ approved energy modeling software. The software will generate a report of approved measures based on their Savings to Investment Ratio (SIR). Work will then be prioritized and completed in descending order from highest to lowest cost effectiveness (SIR).

Where possible, AE will use the US DOE "Climate Region 2" priority lists.

## **Work Scope Development**

Based on the audit report, AE will develop a detailed scope of work that will include energy efficient and clean energy upgrade opportunities. See Plans for Weatherization Deferrals above for next steps if the home is deferred.

## **Work Implementation & Installation**

Qualified contractors will perform the installation and retrofit work according to the scope of work. AE will manage the entire contractor process, including hiring, ensuring accountability and quality control, and invoicing. Additionally, AE has completed similar efforts through CARES and ARPA funding in extremely compressed timeframes.

## **Final Inspection**

Once the work is complete, AE staff will conduct the final inspection of the installation of WAP and clean energy upgrades, health and safety measures, and incidental repairs were performed in compliance with the NC WAP Standards and county building codes. Any necessary adjustments are made at this stage before invoices are paid.

## **Strong Partnerships**

Advanced Energy will leverage decades of community building and local partnerships to successfully meet the WAP goals in the regions. Electric co-ops across the regions (see attached Letters of Support), Duke Energy, and partners named in Table 3, Deferral Partners, of this application will be vital in advancing DEQ goals to assist LMI residents with energy efficiency upgrades to reduce their energy burden and improve home living conditions.

In addition to energy-efficient upgrades, Advanced Energy recognizes the importance of clean energy upgrades. If NCDEQ is awarded funding through US EPA's Solar for All grant, this will allow us to expand the number of low-income and disadvantaged communities primed for residential solar investment. If awarded, Advanced Energy is well positioned as a named coalition member to leverage this funding to repair or replace roofs and include solar installations in homes targeted for WAP services. This program will allow us to enhance the weatherization process by offering clients access to renewable energy, extending the reach of clean energy to clients who may not have had access otherwise.

All the above services will play a crucial role in creating a more resilient energy grid.<sup>1</sup> Weatherization improvements, such as insulation enhancements and sealing air leaks, can significantly reduce energy consumption. This reduction in demand can make the energy grid more resilient by lessening the strain on energy resources and reducing the risk of blackouts or brownouts during periods of high demand. Additionally, by reducing energy consumption and incorporating renewable energy sources, these upgrades can also lower greenhouse gas emissions. This contribution to mitigating climate change can indirectly enhance grid resilience by reducing the frequency and severity of extreme weather events that can disrupt energy infrastructure.<sup>2</sup>

## METRICS AND DATA PRIVACY

Advanced Energy recognizes the importance of collecting demographic data and metrics for persons in single family units to be weatherized. Below is a list of potential metrics that may be collected through the Project.

<b>Metric</b>	<b>Description</b>
Number of Applications	Track the number of applications received for weatherization services.
Eligible Households	Count the number of households that meet the eligibility criteria for weatherization.
Deferred Households	Count the number of households that are deferred and root cause.
Weatherization Measures Implemented	List the types and number of weatherization measures implemented.
Time to Complete Weatherization	Track the average time taken to complete the weatherization process for each home.
Energy Savings	Measure the estimated energy savings achieved through weatherization measures.
Cost Savings	Calculate the estimated amount of money saved on energy bills after weatherization.
Reduction in Energy Usage	Quantify the percentage reduction in energy usage post-weatherization.
Improved Home Comfort	Survey homeowners on perceived improvements in home comfort (temperature consistency, reduced drafts, etc.).
Job Creation	Count the number of jobs created or sustained through the weatherization program.

Table 5: Potential Project Metrics

<sup>1</sup> [“Resilience in the Infrastructure Investment and Jobs Act \(IIJA\) » Energy, Buildings, & Development.”](#) *Georgetown Climate Center.*

<sup>2</sup> [“Building a Stronger, Cleaner Electric Grid.”](#) *NRDC.*

## Securing Sensitive Information

Advanced Energy recognizes the importance of preserving the privacy and security of the personal information we collect through our services. We understand that these data points are vital for determining eligibility and gauging program effectiveness. Below are ways we ensure the safety of our client data:

- *Limited Access:* All private information collected from clients is stored securely on our database, with each piece of information assigned an identifier to maintain anonymity. Access to these internal data files is strictly limited to relevant staff members who have undergone appropriate training.
- *Anonymous application.* Advanced Energy will assign a number to each application before being submitted into the case management system to ensure no personal information can be accessed by any third parties (including collaborative partners).
- *Secure Storage:* In instances where a hard copy of an application must be used, Advanced Energy will ensure that any copies of sensitive information are stored under lock and key at their respective regional coop partner offices, ensuring physical security in addition to digital protections.
- *Confidentiality Policies:* Advanced Energy imposes stringent confidentiality policies that all staff members must abide by. These policies detail the procedures for managing and storing client data, emphasizing the importance of data privacy, and prohibiting unauthorized access or disclosure.
- *IT Protocol:* We adhere to rigorous cybersecurity protocols to protect our databases from potential threats, with any setbacks subjected to thorough root cause analysis to prevent recurrence.
- *Reporting:* Regular reporting on objectives, project progress, and setbacks is conducted to maintain transparency and accountability. The NC DEQ provides specific reporting forms to be completed in this regard.

By implementing these measures, Advanced Energy demonstrates a strong commitment to protecting the private and personal information of our clients. We acknowledge the sensitive nature of the data we handle and strive to maintain the highest standards of data privacy and security throughout our operations.

## GO/NO-GO MILESTONES

Advanced Energy has identified Go/No-Go milestones for this Project. The completion of 30% of the allocated units by the end of December 31, 2025. This milestone signifies a major checkpoint, and its timely achievement is crucial to ensure the continuation of the subaward. Progress towards meeting this milestone will be reported in the quarterly progress reports submitted including any root cause analysis to NC SEO. Please note that this Go/No Go milestone is subject to change and dependent upon contract agreement date and other dependencies such as workforce and supply chain availability.

The Project will rely on contractors to perform the WAP measures in a timely and quality manner. If we do not meet the 30% target by December 31, 2025 due to a shortage of qualified contractors, Advanced Energy will consider forming our own in-house crew to perform certain measures.

## BUDGET

The detailed budget, including a line item for the number of single-family dwellings for each region follows.

### Region 2

Budget Category	1/1/24 - 6/30/24	7/1/2024 - 6/30/25	7/1/2025 - 6/30/2026	7/1/26 - 6/30/27	
	PY 24, Year 1	PY25, Year 2	PY26, Year 3	PY27, Year 4	TOTAL
Program Operations	\$ 84,990	\$ 540,321	\$ 1,503,503	\$ 1,526,995	\$ 3,655,809
Health and Safety	\$ -	\$ 138,295	\$ 384,822	\$ 390,835	\$ 913,952
Administration		\$ 73,844	\$ 205,478	\$ 208,688	\$ 488,010
<b>Total Costs</b>					\$ 5,057,771
Unit Production Goal	0	69	192	195	456
Average Cost Per Unit (ACPU)					-
% of Total Units	-	15.13	42.11	42.76	100.00

### Region 3

Budget Category	1/1/24 - 6/30/24	7/1/2024 - 6/30/25	7/1/2025 - 6/30/2026	7/1/26 - 6/30/27	
	PY 24, Year 1	PY25, Year 2	PY26, Year 3	PY27, Year 4	TOTAL
Program Operations	\$ 174,240	\$ 1,147,914	\$ 3,181,250	\$ 3,236,099	\$ 7,739,504
Health and Safety	\$ -	\$ 293,588	\$ 813,630	\$ 827,658	\$ 1,934,876
Administration		\$ 156,763	\$ 434,443	\$ 441,933	\$ 1,033,139
<b>Total Costs</b>					\$ 10,707,519
Unit Production Goal	0	147	406	413	966
Average Cost Per Unit (ACPU)					-
% of Total Units	-	15.17	42.05	42.78	100.00

## Region 4

Budget Category	1/1/24 - 6/30/24	7/1/2024 - 6/30/25	7/1/2025 - 6/30/2026	7/1/26 - 6/30/27	
	<b>PY 24, Year 1</b>	<b>PY25, Year 2</b>	<b>PY26, Year 3</b>	<b>PY27, Year 4</b>	<b>TOTAL</b>
Program Operations	\$ 84,990	\$ 571,467	\$ 1,636,119	\$ 1,620,462	\$ 3,913,039
Health and Safety	\$ -	\$ 146,039	\$ 418,111	\$ 414,110	\$ 978,260
Administration		\$ 77,978	\$ 223,253	\$ 221,117	\$ 522,348
<b>Total Costs</b>					\$ 5,413,647
Unit Production Goal	0	73	209	207	489
Average Cost Per Unit (ACPU)					-
% of Total Units	-	14.93	42.74	42.33	100.00





November 21, 2023

A self-supporting  
public agency

Scott Farmer  
Executive Director

PO Box 28066  
Raleigh, NC  
27611-8066

3508 Bush Street  
Raleigh, NC  
27609-7509

TEL. 919-877-5700  
FAX 919-877-5701  
www.nchfa.com

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603  
Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

I am writing on behalf of the North Carolina Housing Finance Agency (NCHFA) to express our support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them safer and more durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to enhance the quality of life for North Carolinians. We look forward to supporting Advanced Energy in achieving this goal through working with our Urgent Repair Program subrecipients to make deferred homes WAP ready, referring qualified homeowners, and offering other support as needed.

Our Agency has partnered with Advanced Energy in the past and has a longstanding relationship. We have been pleased with the staff's professionalism, high ethical standards, and project execution. The Agency is full supportive of Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for all North Carolinians. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,

A handwritten signature in black ink that reads "Michael Handley". The signature is written in a cursive, flowing style.

Michael Handley,  
Manager of Home Ownership Rehabilitation & Compliance

# LUMBEE TRIBE OF NORTH CAROLINA

John L. Lowery | Lumbee Tribal Chairman



November 28, 2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603  
Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

I am writing on behalf of the Lumbee Tribe of North Carolina (Lumbee Tribe) to express our support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them more safe and durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to provide affordable, safe, and sanitary housing options for Lumbee Indian families. We commit to supporting Advanced Energy in achieving this goal through various means including, but not limited to, referring qualified homeowners, providing assistance to homeowners who WAP services are deferred, leveraging additional funding to increase WAP services for households, and offering other support as needed.

The Lumbee Tribe is fully committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for the Lumbee Tribal Members in Robeson, Hoke, Cumberland, and Scotland Counties. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,

A handwritten signature in black ink that reads "Ricky Harris".

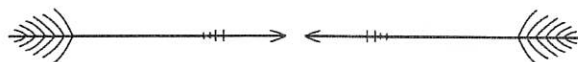
Ricky Harris

Tribal Administrator

Lumbee Tribe of North Carolina

OFFICE OF THE LUMBEE TRIBAL CHAIRMAN

6984 Highway 711 W. | Pembroke, NC 28372 | 910.521.7861





Kendal C. Bowman  
North Carolina State President  
411 Fayetteville Street  
Mail Code: 0993  
Raleigh, NC 27601-1849  
o: 919.546.6794  
[kendal.bowman@duke-energy.com](mailto:kendal.bowman@duke-energy.com)  
[www.duke-energy.com](http://www.duke-energy.com)

December 1, 2023

North Carolina Department of Environmental Quality  
Attention: Matthew Davis  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603

Subject: 2023 NC DEQ Weatherization Assistance Program (WAP) 5-Year BIL RFP for  
Weatherization of Single-Family Units – North Carolina Advanced Energy  
Corporation

Dear Mr. Davis:

Duke Energy would like to express our strong support for North Carolina Advanced Energy Corporation's (Advanced Energy's) response to the Request for Proposal (RFP) for the Weatherization Assistance Program (WAP) 5-Year BIL RFP for Weatherization of Single-Family Units issued by the North Carolina Department of Environmental Quality.

Duke Energy (NYSE: DUK), a Fortune 150 company headquartered in Charlotte, N.C., is one of America's largest energy holding companies. Our electric utilities serve 8.2 million customers in North Carolina, South Carolina, Florida, Indiana, Ohio, and Kentucky, and collectively own 50,000 megawatts of energy capacity. Our natural gas unit serves 1.6 million customers in North Carolina, South Carolina, Tennessee, Ohio, and Kentucky. The company employs over 27,600 people.

Duke Energy continues to advance our clean energy transition to achieve net-zero methane emissions from our natural gas business by 2030 and net-zero carbon emissions from electricity generation by 2050. Through this transition, the company is committed to maintaining affordability and reliability, in part by offering energy efficiency programs to empower customers to reduce their energy costs and help us manage electricity load. By the end of 2025, our energy efficiency programs will have saved a total of 24 million MWh of energy consumption and 8 million tons of carbon emissions, which is equivalent to the emissions produced by more than 2 million homes.

Duke Energy has a longstanding partnership with Advanced Energy to educate North Carolinas stakeholders about the clean energy transition, including providing expert advice for the Home Energy Report program, training of Duke Energy residential EE program staff, training of residential EE project contractors/installers, and performing HVAC savings simulations for various system types and efficiency ratings across different DEC/DEP climate zones. Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to sustainable, affordable energy and community support. We recognize the importance of these types of energy saving projects and how they can reduce costs and improve the quality of life for underserved North Carolinians. We would be pleased to offer support to Advanced Energy as they work to achieve this goal.

Page Two  
Mr. Matthew Davis  
December 1, 2023

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Duke Energy's interests closely align with outcomes of this project and its overall goal of improving energy efficiency to achieve a more sustainable and equitable future for all North Carolina residents. We are pleased to have the opportunity to support Advanced Energy on this proposal.

Sincerely,

A handwritten signature in blue ink, appearing to read "KCB", with a stylized flourish at the end.

Kendal C. Bowman  
Duke Energy, North Carolina State President

November 21, 2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603  
Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

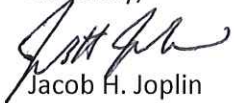
I am writing on behalf of Carteret-Craven Electric Cooperative to express our strong support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Our organization recognizes the importance of ensuring affordable, just, and equitable access to energy for all. Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them safer and more durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to build a Brighter Future for our members. We commit to supporting Advanced Energy in achieving this goal through various means including referring qualified homeowners, providing energy education to homeowners who WAP services are deferred, if possible, leveraging additional funding to increase WAP services for households, and offering other support as needed.

We understand that the success of this project hinges on strong partnerships. As such, we are prepared to collaborate closely with Advanced Energy to ensure that the project meets community needs. We believe that our partnership will significantly benefit Disadvantaged Communities (DACs) by improving living conditions, reducing energy costs, and promoting sustainable practices. We are committing to the development a comprehensive timeline for implementation and communication protocols and are confident that the outcomes of our partnership will be far-reaching, impacting not only residential consumers directly involved but also setting a precedent for future collaborations and initiatives.

Carteret-Craven Electric Cooperative is fully committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for all North Carolina residents. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,



Jacob H. Joplin  
CEO & General Manager  
Carteret-Craven Electric Cooperative



# Central Electric Membership Corporation

A Touchstone Energy® Cooperative



November 29, 2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603  
Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

I am writing on behalf of Central Electric Membership Corporation to express our strong support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Our organization recognizes the importance of ensuring affordable, just, and equitable access to energy for all. Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them more safe and durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to build a Brighter Future for our members. We commit to supporting Advanced Energy in achieving this goal through various means including referring qualified homeowners, providing energy education to homeowners who WAP services are deferred, if possible, leveraging additional funding to increase WAP services for households, and offering other support as needed.

We understand that the success of this project hinges on strong partnerships. As such, we are prepared to collaborate closely with Advanced Energy to ensure that the project meets community needs. We believe that our partnership will significantly benefit Disadvantaged Communities (DACs) by improving living conditions, reducing energy costs, and promoting sustainable practices. We are committing to the development a comprehensive timeline for implementation and communication protocols and are confident that the outcomes of our partnership will be far-reaching, impacting not only residential consumers directly involved but also setting a precedent for future collaborations and initiatives.

Central Electric is fully committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for all North Carolina residents. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,

Jody Albright  
Vice-President of Business Development, Marketing, and Energy Services  
Central Electric Membership Corporation



# Four County Electric Membership Corporation

1822 N.C. 53 West  
Post Office Box 667  
Burgaw, NC 28425

Telephone: (910) 259-2171  
Fax: (910) 259-1860  
Web site: [www.fourcty.org](http://www.fourcty.org)

11/20/2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603  
Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

I am writing on behalf of Four County EMC to express our strong support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

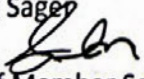
Our organization recognizes the importance of ensuring affordable, just, and equitable access to energy for all. Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them more safe and durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to build a Brighter Future for our members. We commit to supporting Advanced Energy in achieving this goal through various means including referring qualified homeowners, providing energy education to homeowners who WAP services are deferred, if possible, leveraging additional funding to increase WAP services for households, and offering other support as needed.


We understand that the success of this project hinges on strong partnerships. As such, we are prepared to collaborate closely with Advanced Energy to ensure that the project meets community needs. We believe that our partnership will significantly benefit Disadvantaged Communities (DACs) by improving living conditions, reducing energy costs, and promoting sustainable practices. We are committing to the development a comprehensive timeline for implementation and communication protocols and are confident that the outcomes of our partnership will be far-reaching, impacting not only residential consumers directly involved but also setting a precedent for future collaborations and initiatives.

Four County EMC is fully committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for all North Carolina residents. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,

Greg Sager

  
VP of Member Services  
Four County EMC

A Touchstone Energy Cooperative 

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Local Offices:

Burgaw 259-2361 • Elizabethtown 862-3551 • Rose Hill 289-4534



9825 US Hwy 74 E  
Lilesville, NC 28091  
Phone: 1-800-992-1626

November 20, 2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603  
Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

I am writing on behalf of Pee Dee Electric to express our strong support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Our organization recognizes the importance of ensuring affordable, just, and equitable access to energy for all. Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them more safe and durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to Power a Brighter Future for our members. We commit to supporting Advanced Energy in achieving this goal through various means, including referring qualified homeowners, providing energy education to homeowners whose WAP services are deferred, if possible, leveraging additional funding to increase WAP services for households, and offering other support as needed.

We understand that the success of this project hinges on strong partnerships. As such, we are prepared to collaborate closely with Advanced Energy to ensure that the project meets community needs. We believe that our partnership will significantly benefit Disadvantaged Communities (DACs) by improving living conditions, reducing energy costs, and promoting sustainable practices. We are committing to the development of a comprehensive timeline for implementation and communication protocols and are confident that the outcomes of our partnership will be far-reaching, impacting not only residential consumers directly involved but also setting a precedent for future collaborations and initiatives.

Pee Dee Electric is fully committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for all North Carolina residents. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,



Taylor Demby  
Manager of Marketing and Communications  
Pee Dee Electric



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# Piedmont Electric Membership Corporation



A Touchstone Energy® Cooperative

General Office: P.O. Drawer 1179 · Hillsborough, NC 27278 · (919) 732-2123 · Fax: (919) 644-1030

Branch Office: P.O. Box 1327 · 5135 Oxford Road · Roxboro, NC 27573 · (336) 599-0151 · Fax: (336) 597-9088

NC Toll Free: 1-800-222-3107 · Web Address: [www.pemc.coop](http://www.pemc.coop)

November 28, 2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603  
Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

I am writing on behalf of Piedmont Electric Cooperative to express our strong support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Our organization recognizes the importance of ensuring affordable, just, and equitable access to energy for all. Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them safer and more durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to build a Brighter Future for our members. We commit to supporting Advanced Energy in achieving this goal through various means including referring qualified homeowners, providing energy education to homeowners who WAP services are deferred, leveraging additional funding to increase WAP services for households when possible, and offering other support as needed.

We understand that the success of this project hinges on strong partnerships. As such, we are prepared to collaborate closely with Advanced Energy to ensure that the project meets community needs. We believe that our partnership will significantly benefit Disadvantaged Communities (DACs) by improving living conditions, reducing energy costs, and promoting sustainable practices. We are committing to the development of a comprehensive timeline for implementation and communication protocols and are confident that the outcomes of our partnership will be far-reaching, impacting not only residential consumers directly involved but also setting a precedent for future collaborations and initiatives.

Piedmont Electric is fully committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for all North Carolina residents. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,

Steve Hamlin  
President and General Manager  
Piedmont Electric Cooperative



879 McDowell Rd · Asheboro, NC 27205 · 800-672-8212 · RandolphEMC.com

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November 17, 2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603  
Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

I am writing on behalf of Randolph Electric Membership Corporation to express our strong support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Our organization recognizes the importance of ensuring affordable, just, and equitable access to energy for all. Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them safer and more durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to build a Brighter Future for our members. We commit to supporting Advanced Energy in achieving this goal through various means including referring qualified homeowners, providing energy education to homeowners who WAP services are deferred, if possible, leveraging additional funding to increase WAP services for households, and offering other support as needed.

We understand that the success of this project hinges on strong partnerships. As such, we are prepared to collaborate closely with Advanced Energy to ensure that the project meets community needs. We believe that our partnership will significantly benefit Disadvantaged Communities (DACs) by improving living conditions, reducing energy costs, and promoting sustainable practices. We are committing to the development of a comprehensive timeline for implementation and communication protocols. We are confident that the outcomes of our partnership will be far-reaching, impacting not only residential consumers directly involved but also setting a precedent for future collaborations and initiatives.

Randolph Electric Membership Corporation is fully committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for all North Carolina residents. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,

Michael Trent  
Vice President of Member Services and Public Relations  
Randolph Electric Membership Corporation

November 20, 2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603  
Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

I am writing on behalf of South River Electric Membership Corporation (EMC) to express our support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Our cooperative recognizes the importance of ensuring affordable and equitable access to energy for all. Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them safer and more durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to build a brighter future for our members. We commit to supporting Advanced Energy in achieving this goal through various means including referring qualified homeowners, providing energy education to homeowners whose WAP services are deferred, if possible, leveraging additional funding to increase WAP services for households, and offering other support as needed.

The success of this project hinges on strong partnerships. As such, we are prepared to collaborate with Advanced Energy to ensure that the project meets community needs. Our partnership will significantly benefit Disadvantaged Communities (DACs) by improving living conditions, reducing energy costs, and promoting sustainable practices. We are committing to the development of a comprehensive timeline for implementation of this project and are confident that our partnership will positively impact residential consumers across NC directly involved, as well as, set a precedent for future initiatives.

South River EMC is committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this initiative and to continue working toward a brighter future for all North Carolina residents. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,



Catherine O'Dell  
VP of Member Services & PR



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**TRI-COUNTY ELECTRIC  
MEMBERSHIP CORPORATION**

Post Office Box 130 • U.S. Highway 117 South Alternate  
Dudley, North Carolina 28333-0130  
919-735-2611 or 1-800-548-4869 • Fax 1-919-734-6277

"A New Generation of Service"

J. Michael Davis, General Manager

November 17, 2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603  
Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

I am writing on behalf of Tri-County EMC to express our strong support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Our organization recognizes the importance of ensuring affordable, just, and equitable access to energy for all. Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them more safe and durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to build a Brighter Future for our members. We commit to supporting Advanced Energy in achieving this goal through various means including referring qualified homeowners, providing energy education to homeowners who WAP services are deferred, if possible, leveraging additional funding to increase WAP services for households, and offering other support as needed.

We understand that the success of this project hinges on strong partnerships. As such, we are prepared to collaborate closely with Advanced Energy to ensure that the project meets community needs. We believe that our partnership will significantly benefit Disadvantaged Communities (DACs) by improving living conditions, reducing energy costs, and promoting sustainable practices. We are committing to the development a comprehensive timeline for implementation and communication protocols and are confident that the outcomes of our partnership will be far-reaching, impacting not only residential consumers directly involved but also setting a precedent for future collaborations and initiatives.

Tri-County EMC is fully committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for all North Carolina residents. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,

Robert B. Kornegay

Manager of Member Services  
Tri-County Electric Membership Corporation



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**HEADQUARTERS** 795 Ocean Hwy. W., Supply, NC 28462 | PO Box 826, Shallotte, NC 28459 **(800) 842-5871** | (910) 754-4391 | Fax (910) 755-4299

November 28, 2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603  
Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

I am writing on behalf of Brunswick Electric Membership Corporation (BEMC) to express our strong support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Our organization recognizes the importance of ensuring affordable, just, and equitable access to energy for all. Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them more safe and durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to build a Brighter Future for our members. We commit to supporting Advanced Energy in achieving this goal through various means including referring qualified homeowners, providing energy education to homeowners who WAP services are deferred, if possible, leveraging additional funding to increase WAP services for households, and offering other support as needed.

We understand that the success of this project hinges on strong partnerships. As such, we are prepared to collaborate closely with Advanced Energy to ensure that the project meets community needs. We believe that our partnership will significantly benefit Disadvantaged Communities (DACs) by improving living conditions, reducing energy costs, and promoting sustainable practices. We are committing to the development a comprehensive timeline for implementation and communication protocols and are confident that the outcomes of our partnership will be far-reaching, impacting not only residential consumers directly involved but also setting a precedent for future collaborations and initiatives.

BEMC is fully committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for all North Carolina residents. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,

Kyle Rigby  
Supervisor of Energy Solutions  
Brunswick Electric Membership Corporation



November 28, 2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603

Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

I am writing on behalf of Lumbee River EMC to express our strong support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Our organization recognizes the importance of ensuring affordable, just, and equitable access to energy for all. Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them more safe and durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to build a Brighter Future for our members. We commit to supporting Advanced Energy in achieving this goal through various means including referring qualified homeowners, providing energy education to homeowners who WAP services are deferred, if possible, leveraging additional funding to increase WAP services for households, and offering other support as needed.

We understand that the success of this project hinges on strong partnerships. As such, we are prepared to collaborate closely with Advanced Energy to ensure that the project meets community needs. We believe that our partnership will significantly benefit Disadvantaged Communities (DACs) by improving living conditions, reducing energy costs, and promoting sustainable practices. We are committing to the development a comprehensive timeline for implementation and communication protocols and are confident that the outcomes of our partnership will be far-reaching, impacting not only residential consumers directly involved but also setting a precedent for future collaborations and initiatives.

Lumbee River EMC is fully committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for all North Carolina residents. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,

Misha Melvin  
Director of Energy Services  
Lumbee River EMC



November 22, 2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603

Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

I am writing on behalf of Wake Electric Membership Corporation to express our strong support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Our organization recognizes the importance of ensuring affordable, just, and equitable access to energy for all. Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them more safe and durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to build a Brighter Future for our members. We commit to supporting Advanced Energy in achieving this goal through various means including referring qualified homeowners, providing energy education to homeowners who WAP services are deferred, if possible, leveraging additional funding to increase WAP services for households, and offering other support as needed.

We understand that the success of this project hinges on strong partnerships. As such, we are prepared to collaborate closely with Advanced Energy to ensure that the project meets community needs. We believe that our partnership will significantly benefit Disadvantaged Communities (DACs) by improving living conditions, reducing energy costs, and promoting sustainable practices. We are committing to the development a comprehensive timeline for implementation and communication protocols and are confident that the outcomes of our partnership will be far-reaching, impacting not only residential consumers directly involved but also setting a precedent for future collaborations and initiatives.

Wake Electric Membership Corporation is fully committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for all North Carolina residents. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,  
Scott Poole  
Vice President of Customer Service







A Touchstone Energy® Cooperative

# Tideland EMC

**Real People. Real Power.**

November 17, 2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
Attention: Matthew Davis  
217 West Jones Street  
Raleigh, NC 27603  
Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Davis,

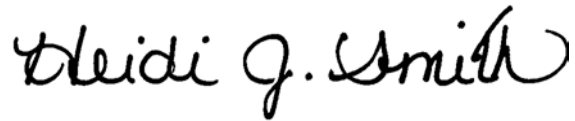
I am writing on behalf of Tideland Electric Membership Corporation to express our most enthusiastic support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Our organization recognizes the importance of ensuring affordable, just, and equitable access to energy for all. Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them more safe and durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to build a Brighter Future for our members. We commit to supporting Advanced Energy in achieving this goal through various means including referring qualified homeowners, providing energy education to homeowners who WAP services are deferred, if possible, leveraging additional funding to increase WAP services for households, and offering other support as needed. Because Tideland is actively in the field providing no-cost energy audits to our members along with blower door or duct blaster testing, we believe that would better position our members to immediately benefit from the proposed Advanced Energy initiative and take action sooner rather than later.

We understand that the success of this project hinges on strong partnerships. As such, we are prepared to collaborate closely with Advanced Energy to ensure that the project meets community needs. We believe that our partnership will significantly benefit Disadvantaged Communities (DACs) by improving living conditions, reducing energy costs, and promoting sustainable practices. We are committing to the development of a comprehensive timeline for implementation and communication protocols and are confident that the outcomes of our partnership will be far-reaching, impacting not only residential consumers directly involved but also setting a precedent for future collaborations and initiatives.

Tideland EMC is fully committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for all North Carolina residents. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,

A handwritten signature in black ink that reads "Heidi J. Smith". The signature is written in a cursive, flowing style.

Heidi Jernigan Smith  
Manager of Energy Services and Corporate Communications  
Tideland Electric Membership Corporation  
PO Box 159  
Pantego, NC 27860  
Office: 252.944.2410  
Cell: 252.945.7891  
Email: [heidismith@tidelandemc.com](mailto:heidismith@tidelandemc.com)



# Edgecombe-Martin County Electric Membership Corporation

A Touchstone Energy® Cooperative 

November 17, 2023

North Carolina Department of Environmental Quality  
Weatherization Assistance Program  
217 West Jones Street  
Raleigh, NC 27603  
Subject: Letter of Support for Advanced Energy's RFP Response

Dear Mr. Matthew Davis,

I am writing on behalf of Edgecombe-Martin County EMC to express our strong support for North Carolina Advanced Energy's (Advanced Energy's) response to the Request for Proposals (RFP) for the Weatherization Assistance Program (WAP) *5-Year BIL RFP for Weatherization of Single-Family Units* issued by the North Carolina Department of Environmental Quality.

Our organization recognizes the importance of ensuring affordable, just, and equitable access to energy for all. Weatherization and energy efficiency upgrades in homes can lower energy costs for low-income families while also making them more safe and durable. We believe that Advanced Energy's goal of weatherizing 2,000 homes in targeted regions in North Carolina aligns with our own commitment to build a Brighter Future for our members. We commit to supporting Advanced Energy in achieving this goal through various means including referring qualified homeowners, providing energy education to homeowners who WAP services are deferred, if possible, leveraging additional funding to increase WAP services for households, and offering other support as needed.

We understand that the success of this project hinges on strong partnerships. As such, we are prepared to collaborate closely with Advanced Energy to ensure that the project meets community needs. We believe that our partnership will significantly benefit Disadvantaged Communities (DACs) by improving living conditions, reducing energy costs, and promoting sustainable practices. We are committing to the development a comprehensive timeline for implementation and communication protocols and are confident that the outcomes of our partnership will be far-reaching, impacting not only residential consumers directly involved but also setting a precedent for future collaborations and initiatives.

Edgecombe-Martin County EMC is fully committed to supporting Advanced Energy's RFP response and the objectives outlined therein. We look forward to the opportunity to contribute to the success of this significant initiative and to continue working towards a more sustainable and equitable future for all North Carolina residents. Thank you for considering our support in your evaluation of Advanced Energy's proposal.

Sincerely,

Eddie Stocks  
V.P. of Member Services and Industrial Development  
Edgecombe-Martin County EMC

### Expertise

- Building Science and Residential Construction
- Energy Efficiency and Demand-Side Management Program Design and Implementation
- Workforce Development

### Accomplishments

- Board Member: Joules Accelerator, Habitat for Humanity of North Carolina
- Former Board Member: Southeast Energy Efficiency Alliance, Inter-Church Council Affordable Housing Corporation
- Former Member: Habitat for Humanity International Sustainable Building Advisory Board, North Carolina Housing Coalition
- E4 Carolinas Emerging Leaders Program

### Education

- B.S. Appropriate Technologies, Appalachian State University (2000)

Brian oversees the operations of the residential, electric transportation, commercial and industrial, motors and drives, and renewables initiatives at Advanced Energy. He provides leadership and insight across the company and its team members.

### Experience

#### **Advanced Energy | Raleigh, NC (2002-Present)**

##### *Chief Operating Officer / Senior Vice President (2013-Present)*

- Oversee company operations, including product delivery and business development
- Manage company financial and environmental performance
- Provide strategic direction in support of staff and customers

##### *Program Manager (2005-2012)*

- Created company's existing homes division to focus on bringing energy efficiency to the existing homes market
- Managed and oversaw the development of DOE's Guidelines for Home Energy Professionals
- Spearheaded application as the only Home Performance with ENERGY STAR Sponsor in North Carolina
- Provided quality assurance oversight and consulting to the Southeast Energy Efficiency Alliance and their partner communities in support of various Better Buildings-funded residential programs
- Developed and delivered training curriculum for weatherization training centers nationwide

##### *Quality Control Technician (2002-2005)*

- Worked with builders and contractors to ensure participating homes met program standards
- Visited sites during framing, wall insulation and final stages of construction
- Performed quality assurance and on-site training

#### **Corlett, Skaer & DeVoto Architects | San Francisco, CA (2000-2002)**

##### *Sound Remediation Specialist*

- Assessed homes and schools and generated work scopes based on soundproofing needs



# Christine C. Maurer, PE, CEM

Engineering Manager

## Expertise

- Building Program Delivery Teams
- Staff Leadership and People Management
- Coaching
- Financial Planning and Management
- Strategic Business Planning
- Problem Solving
- Decision Making
- Training and Education

## Accomplishments

- Licensed Professional Engineer in North Carolina (#034988)
- Certified Energy Manager

## Education

- M.S. Mechanical Engineering, North Carolina State University (2004)
- B.S. Environmental Studies with Concentration in Pollution Control, University of North Carolina at Asheville (2000)

Christine has over 20 years of experience in the clean energy industry. She demonstrates excellent leadership as she works to improve the overall function of Advanced Energy's technical team.

## Experience

### Advanced Energy | Raleigh, NC (2007-Present)

#### *Engineering and Technical Team Manager*

- Direct engineering department across all expertise areas of company
- Manage employees, including responsibilities of hiring, onboarding, delegating assignments, workload, performance development planning, coaching, engagement and termination
- Prepare annual budgets and review financial performance; manage labor, direct and indirect expenses to meet financial targets

#### *Energy Engineer*

- Administered program to benchmark utility usage and proper energy management practices in 40 K-12 school systems across NC
- Managed ARRA-funded project to help over 90 entities in NC develop strategic energy plans, perform energy audits, apply for grants, and conduct measurement and verification
- Developed and delivered training programs on energy audits, energy efficiency in lighting and HVAC, strategic energy plans and energy management principles

### NC State University Facilities Operations | Raleigh, NC (2005-2007)

#### *Energy Conservation Coordinator*

- Updated Strategic Energy Plan and evaluated key performance indicators submitted to the state of North Carolina
- Coordinated implementation of utility billing system and database
- Identified opportunities and performed follow-up studies on energy efficiency projects

### North Carolina Solar Center | Raleigh, NC (2001-2005)

#### *Research Assistant*

- Analyzed effectiveness of a transpired solar collector for preheating makeup air at an industrial facility
- Assisted in design, installation and routine maintenance of solar hot water and grid-connected PV systems
- Studied moisture control and energy use in crawl spaces



# Kristin Riggins

Homes and Communities Supervisor

## Expertise

- Program Strategy, Design, Implementation and Management
- Market Research
- Cross-Functional Team Leadership
- Residential Energy Efficiency and Demand-Side Management

## Accomplishments

- 2016 Chartwell Best Practices Award
- 2015 Kansas City Regional Clean Cities Agent of Change

## Education

- B.S. Marketing and Business Management, Northwest Missouri State University (2005)

Kristin has 17 years of experience in the energy industry, researching, designing, implementing, managing and evaluating energy efficiency and demand-side management programs.

## Experience

### **Advanced Energy | Raleigh, NC (2018-Present)**

*Homes and Communities Supervisor (2021-Present)*

- Provide strategic direction, leadership and support for the residential and electric transportation teams
- Provide technical expertise and program consulting for customers

*Utility Program Consultant (2018-2021)*

- Provided technical expertise for utility programs and projects
- Conducted research and developed reports
- Provided internal program consulting and recommendations

### **KCP&L | Kansas City, MO (2006-2017)**

*Manager of Renewable Energy and Electric Transportation Products (2014-2017)*

- Spearheaded deployment of charging network with more than 900 Level 2 and 15 DC fast chargers across 300 locations
- Supervised teams responsible for daily operations and management of net metering, a solar rebate program and charging station network deployment

*Product Manager II and Senior Product Manager—Demand Response and Smart Grid (2010-2014)*

- Responsible for product and service platforms for demand response and dynamic pricing
- Led deployment of new customer products integrated with advanced metering infrastructure and grid systems with advanced demand response functionality

*Product Manager—Energy Efficiency (2008-2010)*

- Managed development and delivery of energy efficiency programs, including Home Performance with ENERGY STAR, ENERGY STAR New Homes and Low-Income Weatherization
- Developed, maintained and advanced key business relationships with trade allies
- Supported development of product marketing strategies and led execution of product marketing plans

## Expertise:

- Operations
- Facilitation
- Residential Program Design and Implementation
- Project Management
- Building Science

## Accomplishments:

- Racial Equity Training (REI)
- Meeting Design and Facilitation Training (COS)
- Certified Project Management Professional (PMP)
- Past Member, North Carolina Housing Coalition
- RESNET Quality Assurance Designee (2010—2015)
- HERS Rater (2007—2015)
- BPI Building Analyst and Envelope Professional (2010—2015)

## Education:

- M.S. Agricultural and Applied Economics, Resource and Environmental Economics Concentration, Virginia Polytechnic Institute, Blacksburg, VA (2004)

As Operations Manager, Maria manages a team of project managers, supporting projects and programs that promote energy efficiency practices in both residential and commercial markets. With over 14 years at Advanced Energy, Maria has a diverse range of experiences, including facilitation, technical buildings expertise, understanding low-income markets, building science research, overseeing and training contractor networks, and managing energy efficiency programs.

## Experience:

### Advanced Energy | Raleigh, NC (2017-Present)

#### *Operations Manager*

- Supports Executive Leadership to provide visionary and strategic leadership for the organization
- Build relationships and a corporate culture that values people and respectful interactions at all levels
- Manages and supports project management team, ensuring staff have training, resources and processes needed to deliver projects successfully
- Chairs and facilitates Advanced Energy's Diversity and Inclusion Committee

### Advanced Energy | Raleigh, NC (2013-2018)

#### *Program Manager*

- Managed a suite of affordable housing guaranteed energy efficiency programs
- Provided technical and process support to developers, construction managers and subcontractors participating in energy efficiency programs
- Led a team to evaluate, upgrade and launch new program standards
- Facilitated Solution Summits for DOE's Weatherization Assistance Program
- Facilitated a process to review and revise the North Carolina Interconnection Standards



## **Advanced Energy | Raleigh, NC (2008-2013)**

*Project Manager/Building Science Associate*

- Developed and directed the North Carolina Rater Camp
- Directed the NC Sustainable Building Design Competition
- Provided project management support for development of the DOE's Guidelines for Home Energy Upgrades
- Managed a RESNET Providership for HERS Raters
- Provided technical and process support to North Carolina HERS Raters
- Conducted quality assurance and training for HERS Raters, builders and subcontractors

## **Advanced Energy | Raleigh, NC (2006-2008)**

*Building Science Associate*

- Provided support as lead project assistant and field technician for DOE-funded crawl space research
- Conducted field work for healthy homes research

## **Chatham Habitat for Humanity | Pittsboro, NC (2005 –2006)**

*AmeriCorps Construction Supervisor*

- Volunteer training and coordination
- Construction of high-performance homes



# Michael Matthews

Technical Specialist

## Expertise

- Field Inspections
- Home Energy Modeling
- Technical Support
- Communication

## Accomplishments

- HERS Rater Certification
- OSHA 30
- Selling Energy Efficiency Training, Efficiency Sales Professionals

## Education

- A.D. Landscape Architecture, Wake Technical Community College (2005)

Michael is an experienced field auditor with project management and customer service expertise. He is detail oriented and committed to creating connections that lead to trust with both fellow employees and clients. Having spent his entire professional life in metro Raleigh, Michael has extensive local relationships and a history of working with diverse members of the community.

## Experience

### **Advanced Energy | Raleigh, NC (2018-Present)**

#### *Technical Specialist*

- Perform HERS ratings, conduct field inspections and manage data for homes receiving a variety of third-party certifications
- Leverage construction experience and communication skills to support SystemVision affiliates and troubleshoot issues in the field
- Work with team members to implement process updates, refine program standards and conduct related trainings

### **NetZero USA | Raleigh, NC (2017-2018)**

#### *General Manager LED Lighting Solutions*

- Consulted with private and public sector clients about energy efficiency and lighting savings opportunities
- Increased efficiency in back-office processes to facilitate installation of sold lighting upgrades
- Exceeded sales goals and increased annual revenue and billable work to set a proper course for expansion

### **Lime Energy | Raleigh, NC (2013-2017)**

#### *Senior Energy Advisor*

- Conducted over 1,000 audits for commercial and industrial customers, selling \$4.5 M in lighting projects
- Maintained an updated command of lighting subject matter
- Interviewed, trained and mentored new hires

### **Resources for Seniors | Raleigh, NC (2009-2013)**

#### *Residential Weatherization Project Manager*

- Provided weatherization services and quality assessments of homes and multifamily units across North Carolina
- Introduced processes to increase efficiency and reduce costs
- Contributed to successful grant applications that resulted in the weatherization of thousands of additional housing units



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
11/20/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement.

PRODUCER: Alera Group, 4325 Lake Boone Trail, Suite 200, Raleigh, NC 27607
CONTACT NAME: Holly A. Moore
INSURER(S) AFFORDING COVERAGE: The Harford Mutual Insurance Company (14141), The Hanover Insurance Company (22292), Lloyds of London

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES.

Table with columns: INSR LTR, TYPE OF INSURANCE, ADDL INSD, SUBR WVD, POLICY NUMBER, POLICY EFF (MM/DD/YYYY), POLICY EXP (MM/DD/YYYY), LIMITS. Includes sections for Commercial General Liability, Automobile Liability, Umbrella Liab, Workers Compensation, and Professional Liab.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER: NCDEQ State Energy Office, Weatherization Assistance Program, 217 West Jones Street, Raleigh, NC 27603
CANCELLATION: SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.