

NORTH CAROLINA
Environmental Quality

December 12, 2023

ROY COOPER

Governor

ELIZABETH S. BISER

Secretary

JULIE WOOSLEY

Director

Mr. Ravi Malhotra
President
ICAST
7400 W. 14th Avenue
Denver, CO 80214

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

Dear Ravi,

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 \$14,654,502 for "*Region 8*". 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 "*Region 8*" 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, the International Center for Appropriate and Sustainable Technology (ICAST) must sign the acknowledgement form concerning the following documents for the BIL program by January 31, 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,

Matthew F. 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 – Multi-Family ICAST

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	Average Score
ICAST	91	91.4	91	91

Overall Comment

It is clear from ICAST's proposal that they understand the multi-family retrofit market and the unique approach it requires, particularly for MFAH properties. While ICAST is not headquartered in North Carolina itself, their application demonstrates robust success in weatherizing multi-family housing in other states like Colorado, New Mexico, Utah, and Tennessee. Their knowledge, skills and abilities in the application demonstrate that they will create a successful multi-family program in NC. The applicant noted working with the provider in Focus Area 1 and supporting NCDEQ to develop standard operating procedures and protocols for project approval demonstrates the level of thinking necessary to have a robust multi-family weatherization program.

While the application exceeds expectations a more explicit outline of go/no-go milestones in their proposal could have been provided.



NORTH CAROLINA
Environmental Quality

ROY COOPER
Governor
ELIZABETH S. BISER
Secretary
JULIE WOOSLEY
Director

North Carolina Department of Environmental Quality
State Energy Office
Weatherization Assistance Program
5 Yr. Bipartisan Infrastructure Law (BIL)
Request for Proposal (RFP)
Weatherization of Multifamily 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 Multifamily 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

I. Summary 2
II. Background 2
III. Statement of Need 4
IV. RFP Timeline 5
V. Funding Source 5
VI. Contractor Qualifications 6
VII. Key Weatherization Focus Areas 6
VIII. Proposal Guidelines and Requirements 7
IX. Multifamily Retrofit Tool and Workforce Resources 8
X. Justice40 Initiative Guidelines 9
XI. Declaration of Confidential Information 9
XII. Questions about the RFP 9
XIII. Submission Details 10
XIV. Evaluation of Proposals 10
XV. Announcement of Award Recipients 11



XVI.	Davis-Bacon Act	11
XVII.	Build America, Buy America.....	11
XVIII.	Reporting Requirements for Accepted Projects	11
XIX.	Evaluation Process and Scoring – Multi-Family.....	14

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 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, NC WAP is working to build a more sustainable workforce, innovate the existing NC WAP, and surge the number of homes served. The NC WAP has identified multifamily dwellings as an underserved area to improve energy efficiency in the residential sector. NC DEQ aims to identify Weatherization agencies that are equipped to weatherize multifamily units throughout the state.

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 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 homes to replacing heating systems, windows, and doors. NC WAP 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 (1) build a more sustainable workforce, (2) improve and innovate the existing program, and (3) surge the number of weatherized homes. The expansion and improvement of the NC WAP includes a focus of multifamily units in North Carolina. Families living in multifamily housing may have low incomes that deem them eligible for weatherization services. The state of North Carolina aims to serve this population that could benefit from more energy efficient dwellings.

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 Code of Federal Regulations (*CFR*) 440.22. A Subgrantee may weatherize a multifamily rental building containing a sufficient percentage of



eligible rental dwelling units, a single-family building, or a manufactured home provided written permission from the owner or the owner’s agent. See 10 CFR 440.22(b) and WPN 22-13, Weatherization of Rental Units.

The NC WAP is in search of a statewide weatherization agency for multifamily units that will participate in a cooperative home repair approach.¹ 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.

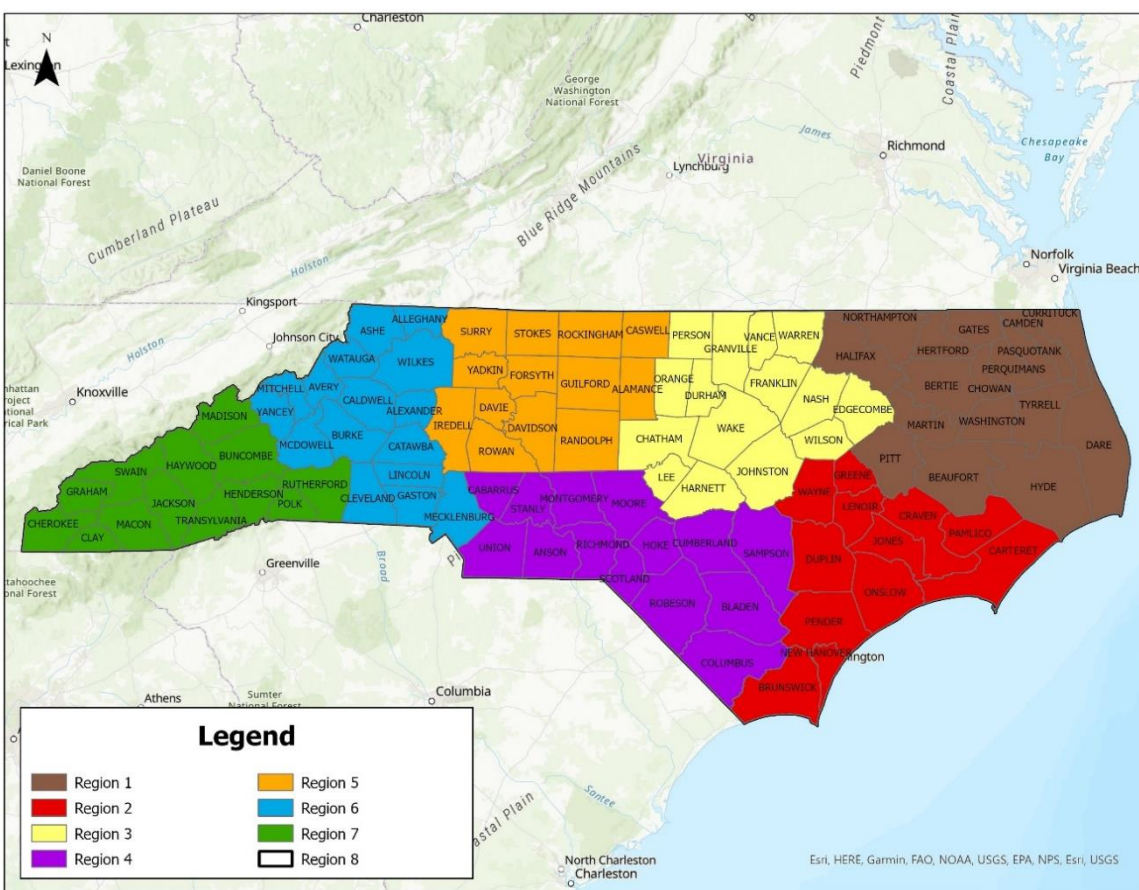


Figure 1. Map of North Carolina color coded by single family weatherization regions. Each region will house a collaborative hub that oversees weatherization and home upgrade services for eligible NC residents. Region 8 encompasses the entire state and is specifically for weatherization of multifamily homes.

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



i. Multifamily Description

Multifamily buildings are those containing five dwelling units or more. For multifamily buildings containing less than 25 units with units that are individually heated or cooled, either the *Multifamily Priority List* or the *Weatherization Assistant* shall be used to determine the proper work scope. In order to weatherize an apartment, all units in the affected building must be weatherized. Groupings of four or more buildings on a single site that are owned by a single owner shall require prior approval from NC WAP.

Small multifamily units are eligible for weatherization, provided that they meet the eligible client occupation minimum:

- a. 50 percent of a duplex,
- b. 66 percent of a triplex, or
- c. 50 percent of a quadplex.

Weatherization work on standalone small multifamily housing (*duplexes, triplexes, and quadplexes*) does not require prior approval from NC WAP.

Additionally, Subgrantees may only count vacant units towards the 50 percent or 66 percent threshold when the building has been assisted by a state or federal program that restricts occupancy to households with incomes that qualify for the Program and where there is a reasonable expectation that the unit will be occupied by such a household within 180 days following completion of the project.

Costs on these properties are limited by the percentage of eligible clients multiplied by the maximum cost-per-unit average. Unlike single family homes, the maximum cost-per-unit is a hard limit. The cost limitation excludes health and safety expenditures (*i.e., allowable measures that help provide, maintain, or mitigate elements to promote healthy living in weatherized homes by following the NC WAP Health and Safety Plan*).

NC WAP has planned for multifamily dwellings containing five or more units to make up **more than** 20% of the State's total weatherized units. Thus, the projects must be evaluated by a U.S. Department of Energy (*DOE*) -approved energy audit tool (*i.e., TREAT, REM, MULTEA*) prior to commencing work on the units. NC WAP may request approval of alternative, DOE approved computer modeling software for use by Subgrantees.

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 renewable energy systems or technologies, reduce their 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 multifamily units throughout the state.



NC WAP intends to select the most qualified Multifamily 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.

The funding for the weatherization of multifamily units is available throughout the state over five years. Selected Multifamily Service Provider(s) shall be required to service the entire state and shall not discriminate. When no wait list is present multifamily properties are to be served on a first come first serve 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 DOE releasing specific guidance for NC WAP agencies under Weatherization Program Notice (*WPN*) BIL 22-1 on March 30, 2022. Financial stimulus from the BIL will build on the historic strength of 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*), in 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.

Up to \$14.654 million has been retained for weatherization of 1,323 multifamily units over the 5-year period (Region 8; Table 1).

It is important to note that NC WAP 5 Yr. BIL funds will follow DOE's March 2022 [Administrative and Legal Requirement Document](#) (*ALRD*) PERIOD OF PERFORMANCE guidance. The \$14.654M 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 Region²

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
Total	\$50,440,112	\$6,733,203	\$12,610,028	\$69,783,343	6,298	

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 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:

² 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).



- 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>

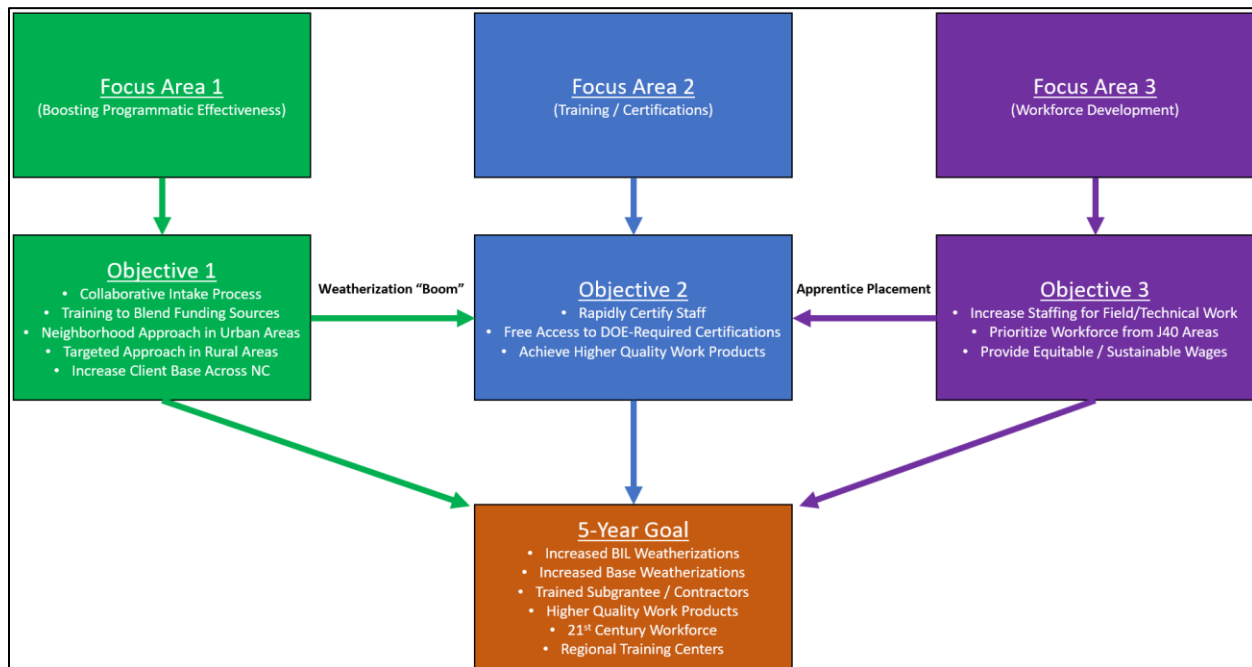


Figure 2. North Carolina’s training and technical assistance approach for the BIL program.

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 Multifamily 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 find multifamily 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 description of your organization’s experience that would assist in complying with Davis-Bacon and Build America Buy America (*BABA*) and recruitment of multifamily units within disadvantaged communities.
- 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 multifamily units to be weatherized, including methods for keeping private and personal information safe.
- Methods for certifying eligibility of $\geq 66\%$ of multifamily building households for weatherization.
- 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 (J40) 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 multifamily dwellings.
- Resumes of those who will manage the multifamily unit weatherization program and 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. Multifamily Retrofit Tool and Workforce Resources

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

- Single-family dwellings up to 4-plexes,
- Mobile homes, and
- Multifamily buildings (*multifamily residential buildings containing 5 or more units per building*)

Large multifamily dwelling criteria will follow the guidelines according to WPN 22-12 and any subsequent amendments or editions. Energy Auditors and Quality Control Inspectors (*QCI*) will be required to have proper certification for multifamily buildings including training on multifamily auditing software and the Building Performance Institute (*BPI*) multifamily 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 multifamily home energy upgrades to ensure that energy efficiency upgrades are effective, durable, and safe. The Multifamily Job Task Analyses (*JTAs*) define the knowledge, skills, and abilities (*KSAs*) that multifamily practitioners use to perform jobs effectively and safely. The *JTAs* provide a foundation for developing high-quality training and credentialing programs. DOE supported the development of multifamily energy auditing tools to advance the NC WAP's ability to address this building type with the creation of the Multifamily Tool for Energy Audits (*MulTEA*). In 2021 DOE also supported the development of a priority list for small multifamily rental buildings with 5 to 24 units. NC WAP will share additional information with subgrantees regarding retrofit tools and requirements as guidance is released. DOE advised that the priority list and additional instructions be shared in a future Weatherization Memorandum.

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

XI. 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.

XII. 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 DEQs written response will be posted to the NC 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.

XIII. 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.

XIV. 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.

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

By rule of the Code of Federal Regulations [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:

- The extent to which the past or current program achieved or is achieving weatherization goals in a timely fashion;
- The quality of work performed by the subgrantee;
- The number, qualifications, and experience of the staff members of the subgrantee; and



- The ability of the subgrantee to secure volunteers, training participants, public service employment workers, and other Federal or State training programs.

XV. 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.

XVI. Davis-Bacon Act

Any BIL-funded weatherization work on multifamily buildings with 5 or more units will be required to pay wages to all laborers and mechanics engaged in the construction, alteration, or repair of those multifamily buildings (*whether employed by a contractor or subcontractor*) wages “*at rates not less than those prevailing on similar projects in the locality, as determined by the Secretary of Labor.*” DOE will provide further guidance regarding Davis-Bacon reporting. BIL multifamily projects should be deferred until clarifying guidance is received, or other funding sources used. Once clarifying guidance is received, NC WAP will provide further guidance via memo. Accounting and tracking activities will be accomplished through the NC WAP client database.

XVII. Build America, Buy America

The Build America, Buy America (*BABA*) provisions of the 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
 - 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 at 10 CFR Part 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 NC 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 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*]
 - 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 – 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 – Multi-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 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 multi-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 (<i>such as project type awareness</i>) 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 (20 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.*, *TREAT*, *REM*, *MULTEA*) prior to commencing work on qualified dwelling units, 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	4	8	12	16	20

Evaluation Criterion 2: Describe your organization's experience that would assist in complying with Davis-Bacon and Build America Buy America and recruitment of multifamily units within disadvantaged communities (10 possible points)

The score received for Criterion 2 will depend upon how well the application details how the project will: (1) prioritize DACs that receive weatherization services, (2) meet prevailing wage requirements and ensure transparency in reporting wages to NC WAP, and (3) procure products that meet the BABA criteria for public housing or privately owned buildings serving a public function.

- 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	2	4	6	8	10



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 DACs within the narrative and uploading documentation relevant to DACs 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.



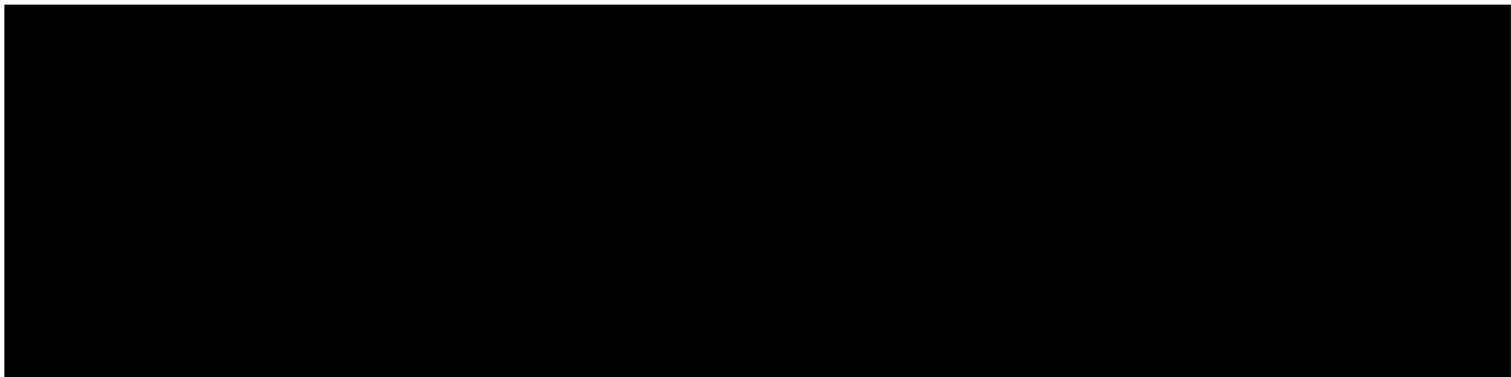
Agency Name	Address	Technical Lead
International Center for Appropriate and Sustainable Technology (ICAST)	7400 W. 14 th Avenue, Denver, CO, 80214	Ravi Malhotra, Founder and President, ravim@icastusa.org

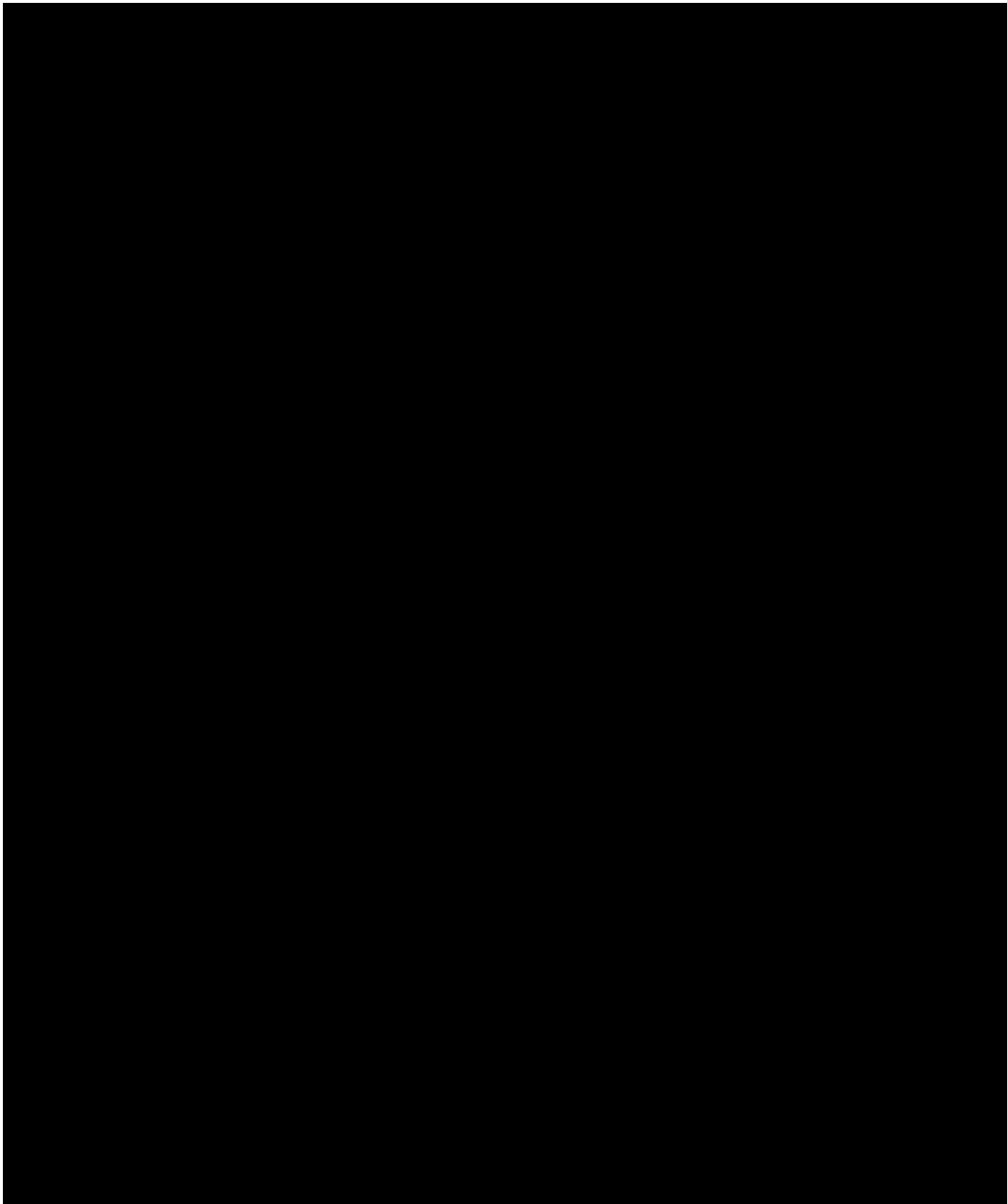
PROPOSAL HIGHLIGHTS: ICAST proposes launching and managing a statewide (Region 8), multifamily affordable housing (MFAH)-focused weatherization program, leveraging North Carolina’s (NC) Bipartisan Infrastructure Law (BIL) allocation. ICAST is a national 501c3 nonprofit with a 21-year history of scaling energy efficiency (EE), renewable energy, and health and safety (H&S) upgrades in MFAH. Its network of MFAH owners and managers is ever-growing and includes those with qualified properties in NC. ICAST has designed and managed many programs to serve MFAH throughout the U.S., including the federal WAP, utility demand-side management (DSM)/EE, and local government programs. Key offerings for the NC BIL WAP include: (1) Assistance updating WAP State Plan and program manuals for multifamily (MF) to streamline qualification and implementation process, (2) Identification of and outreach to eligible MFAH properties, (3) Income qualification of MFAH properties, and (4) Securing of owner contribution and identification/securing of other funds. ICAST offers a one-stop-shop (OSS) approach through which it braids funds (e.g., utility rebates, tax credits, owner cost-share) to reduce cost-per-unit WAP spend. For the program term, ICAST anticipates serving **1,324 low-income (LI) units**, spending **\$14,654,503 of WAP funds** on qualified MFAH properties.

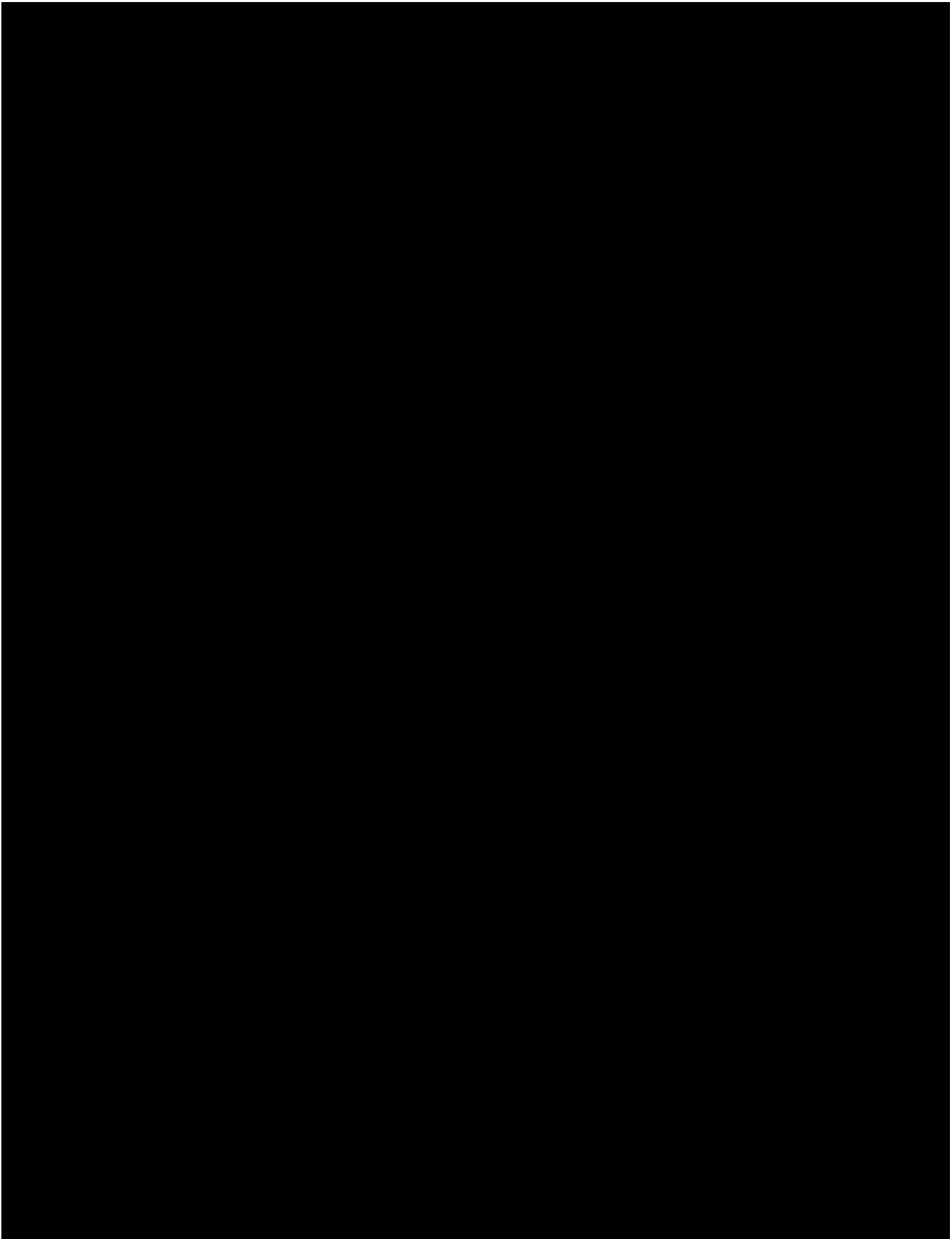
[Redacted content]

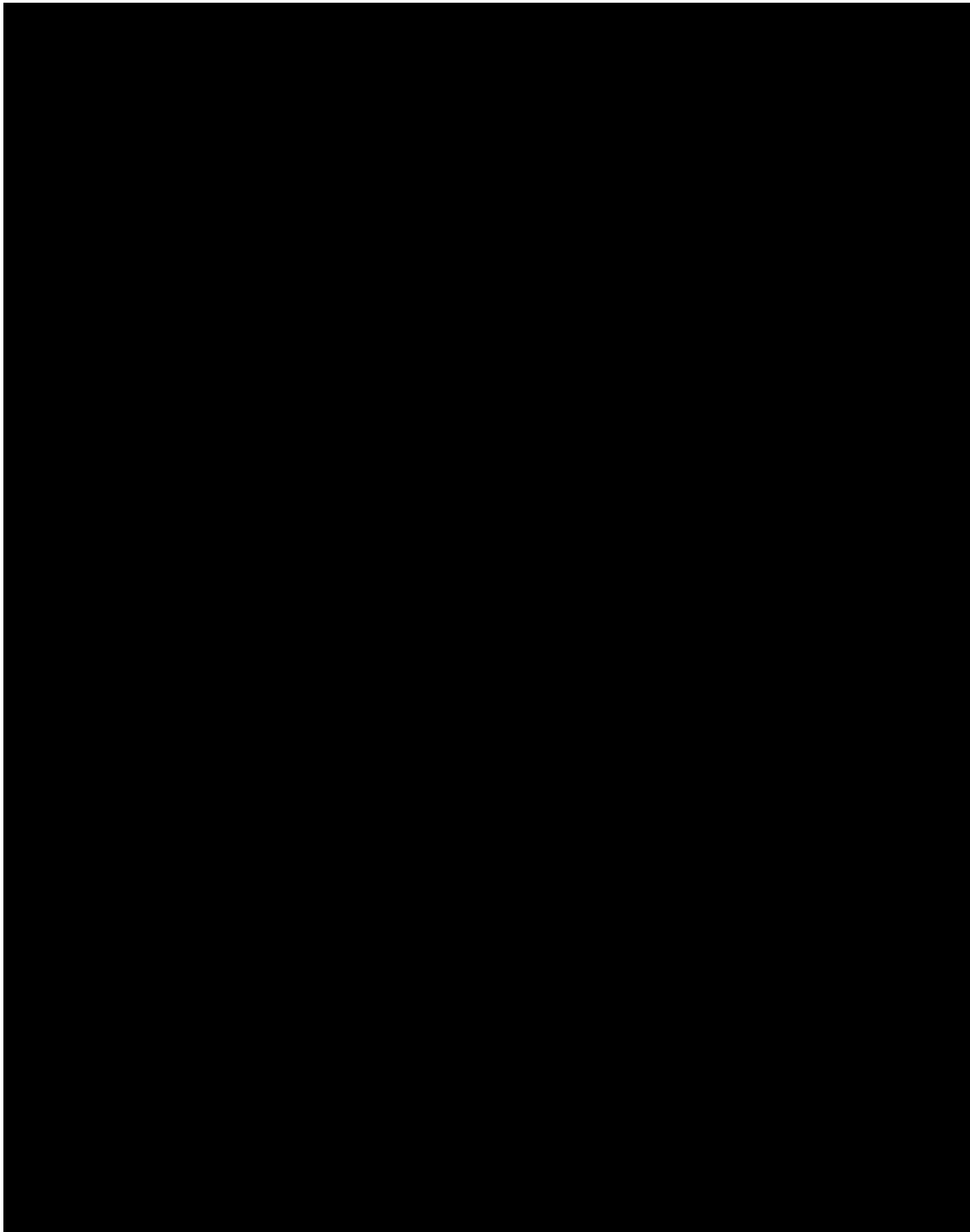
All support letters are attached in a separate file titled ‘NC WAP -BIL MF ICAST Support Letters’.

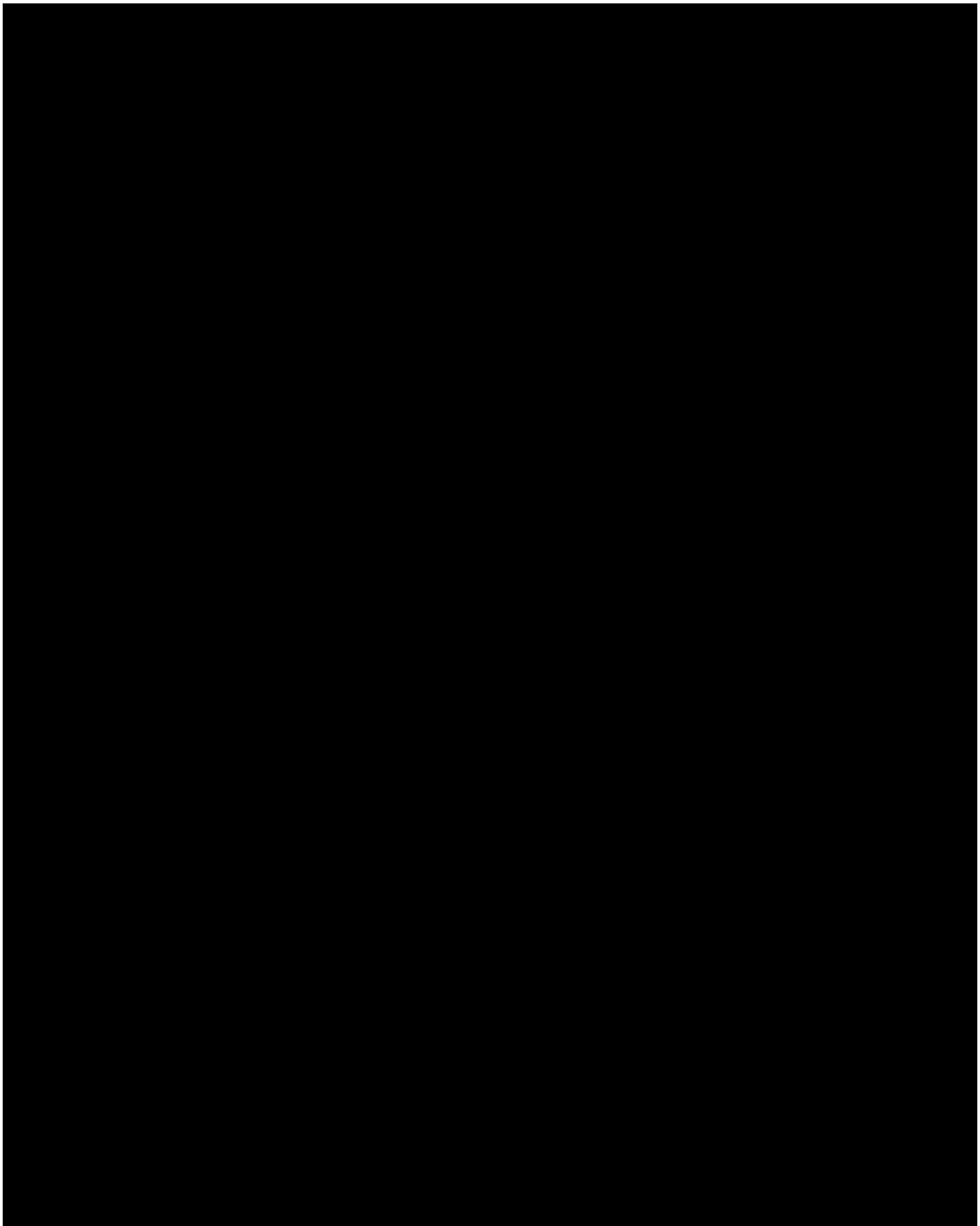
Anticipated Approximate Timeline and Production Schedule			
1.1.24 - 6.30.24 (PY24)	7.1.24 - 6.30.25 (PY25)	7.1.25 - 6.30.26 (PY26)	7.1.26 - 6.30.27 (PY27)
53 Units Completed	344 Units Completed	424 Units Completed	503 Units Completed

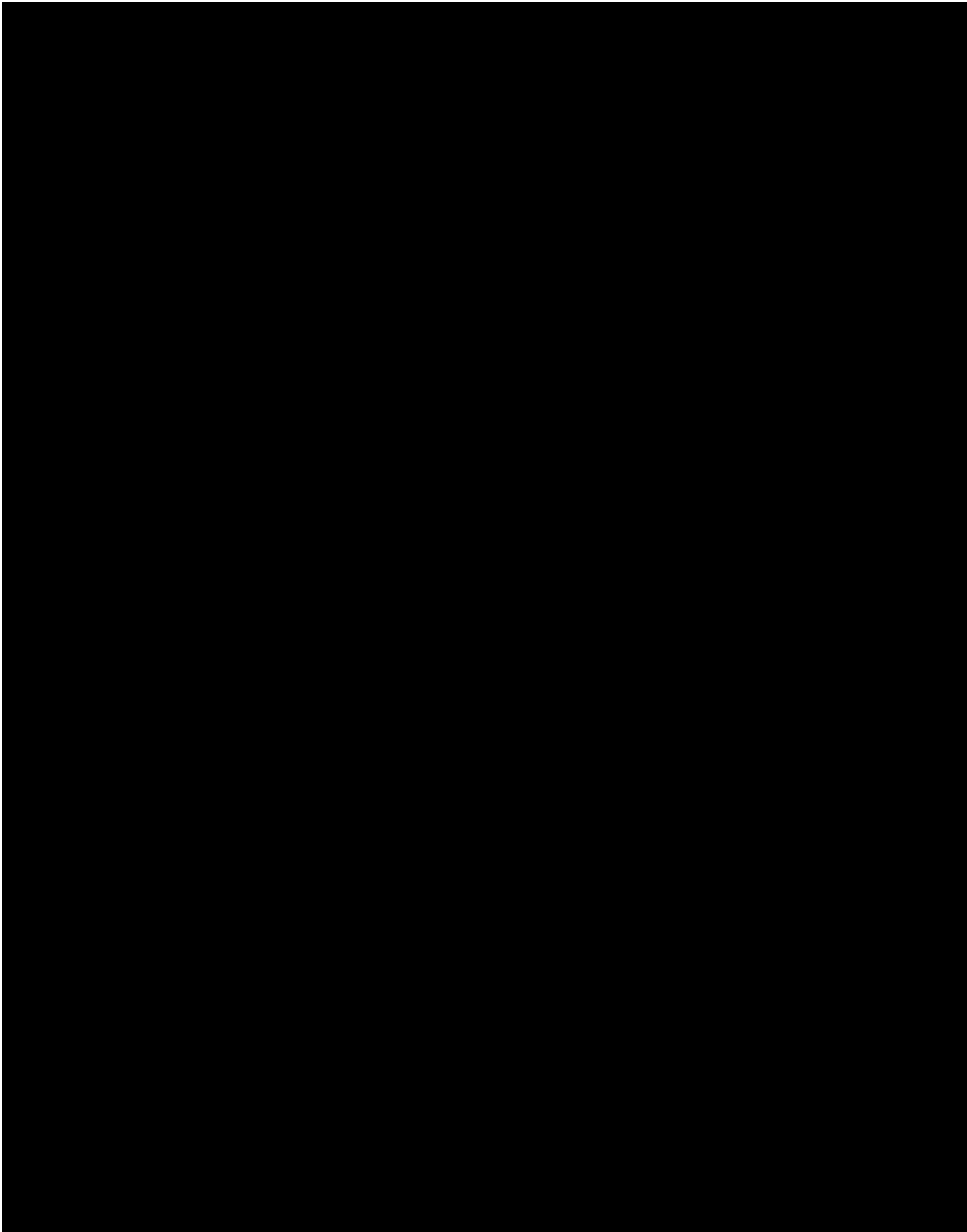


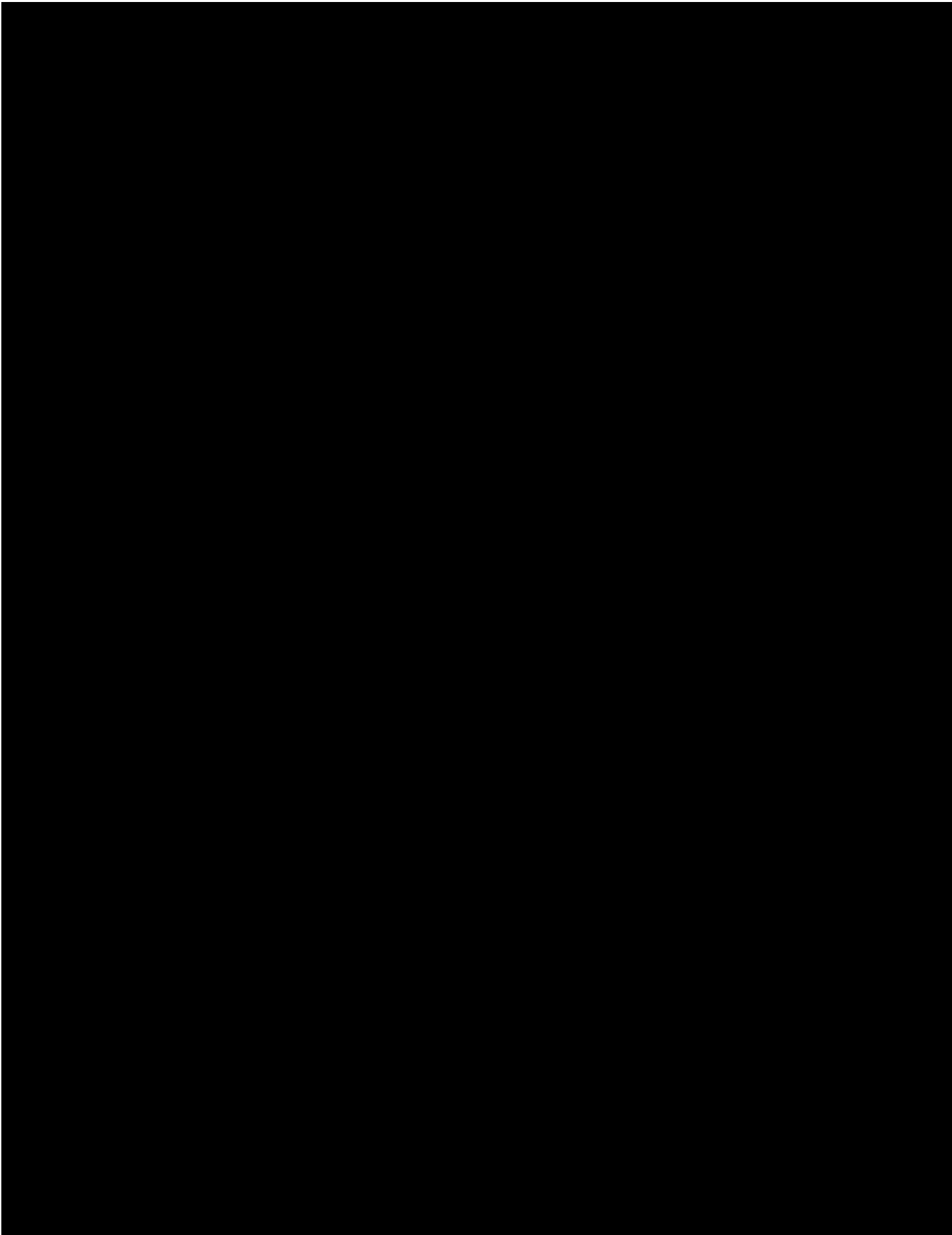


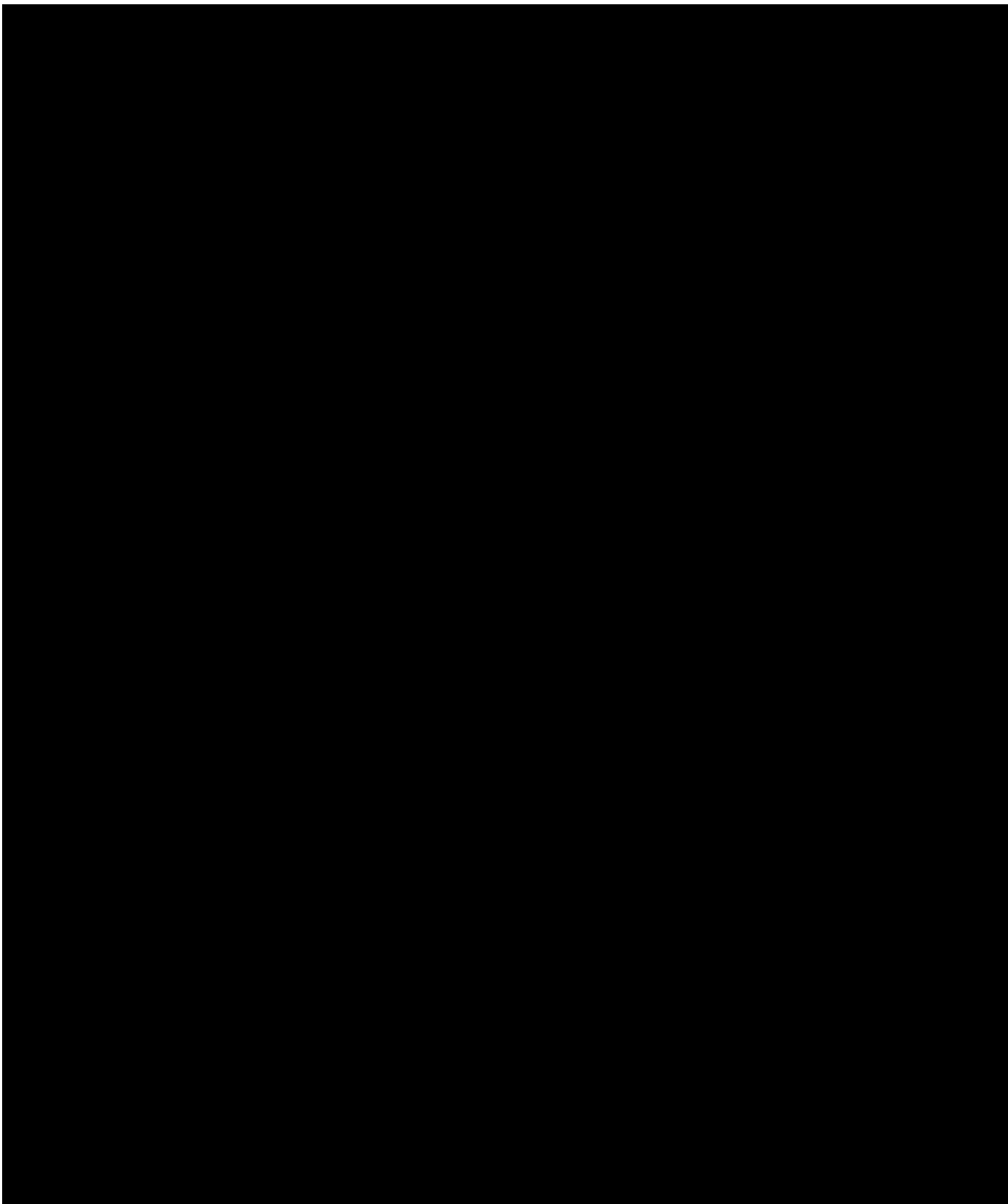


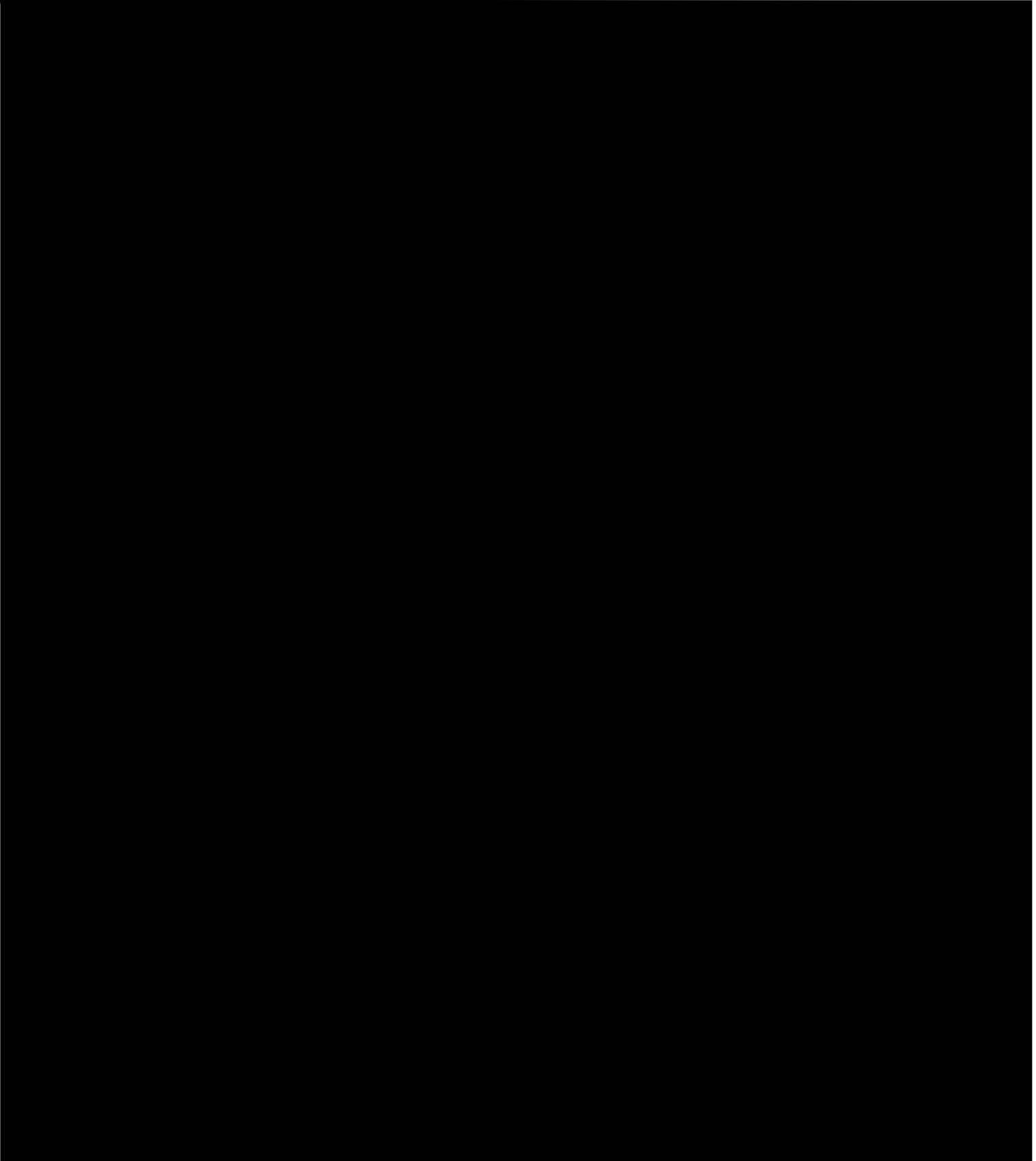


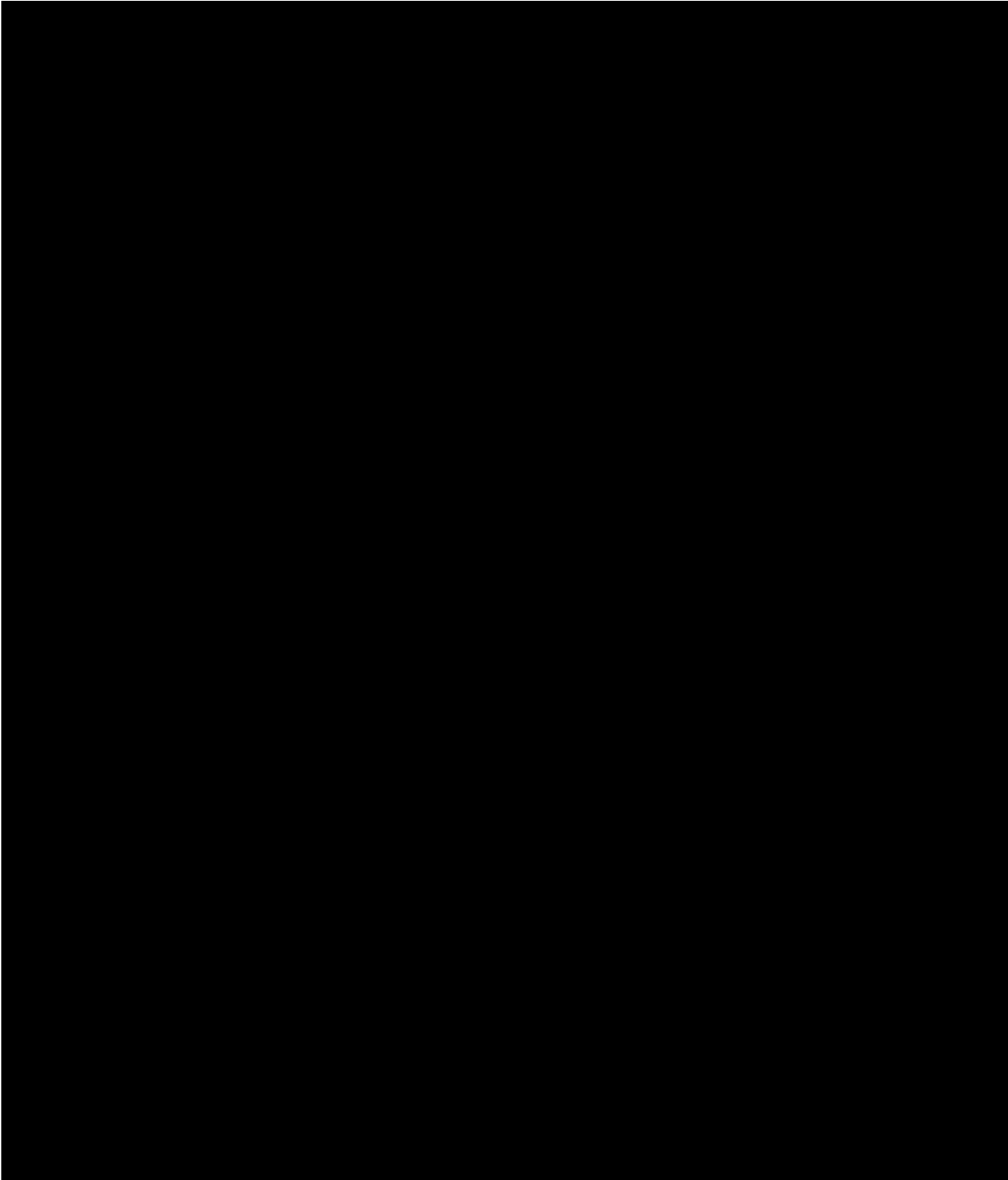


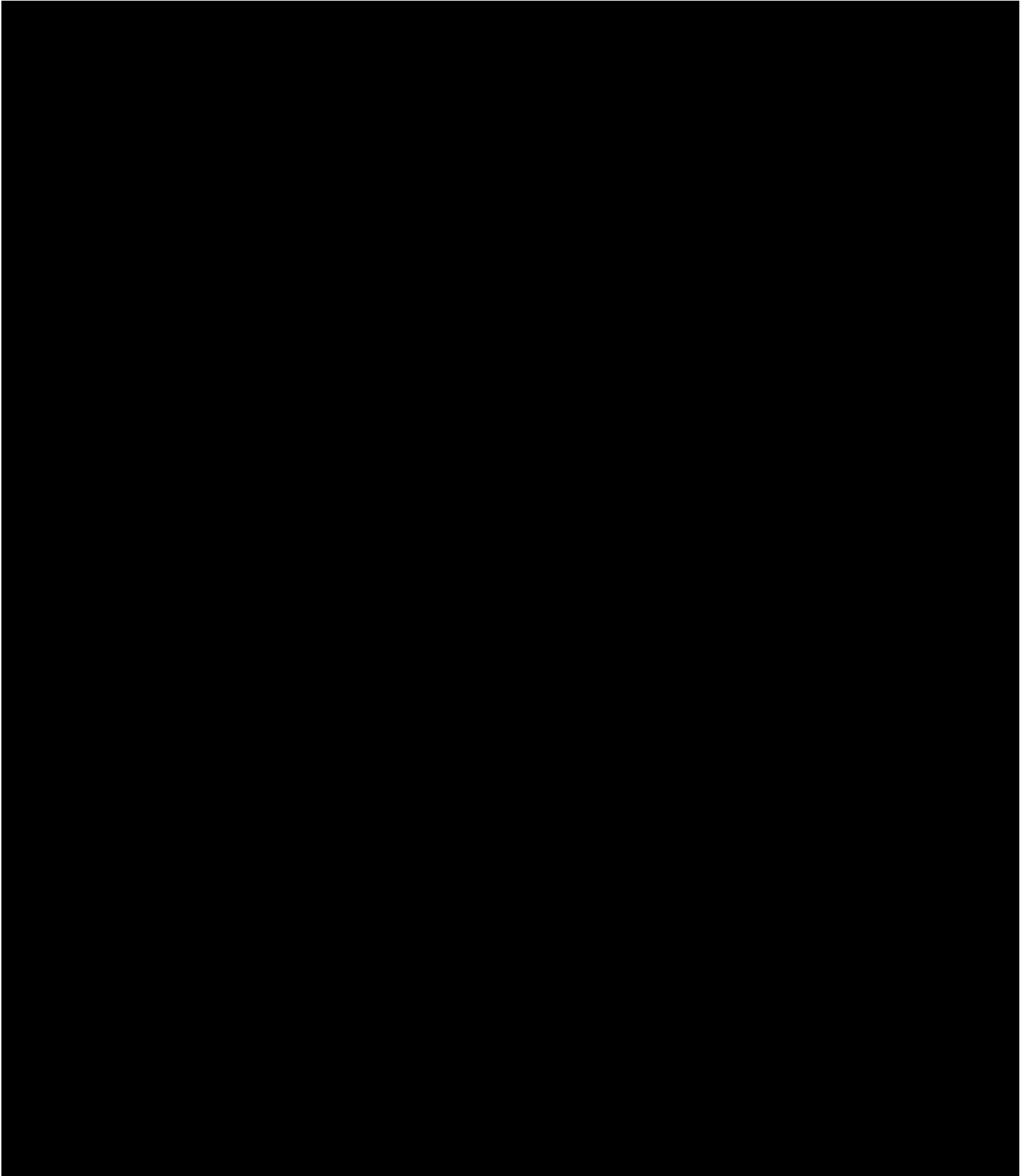


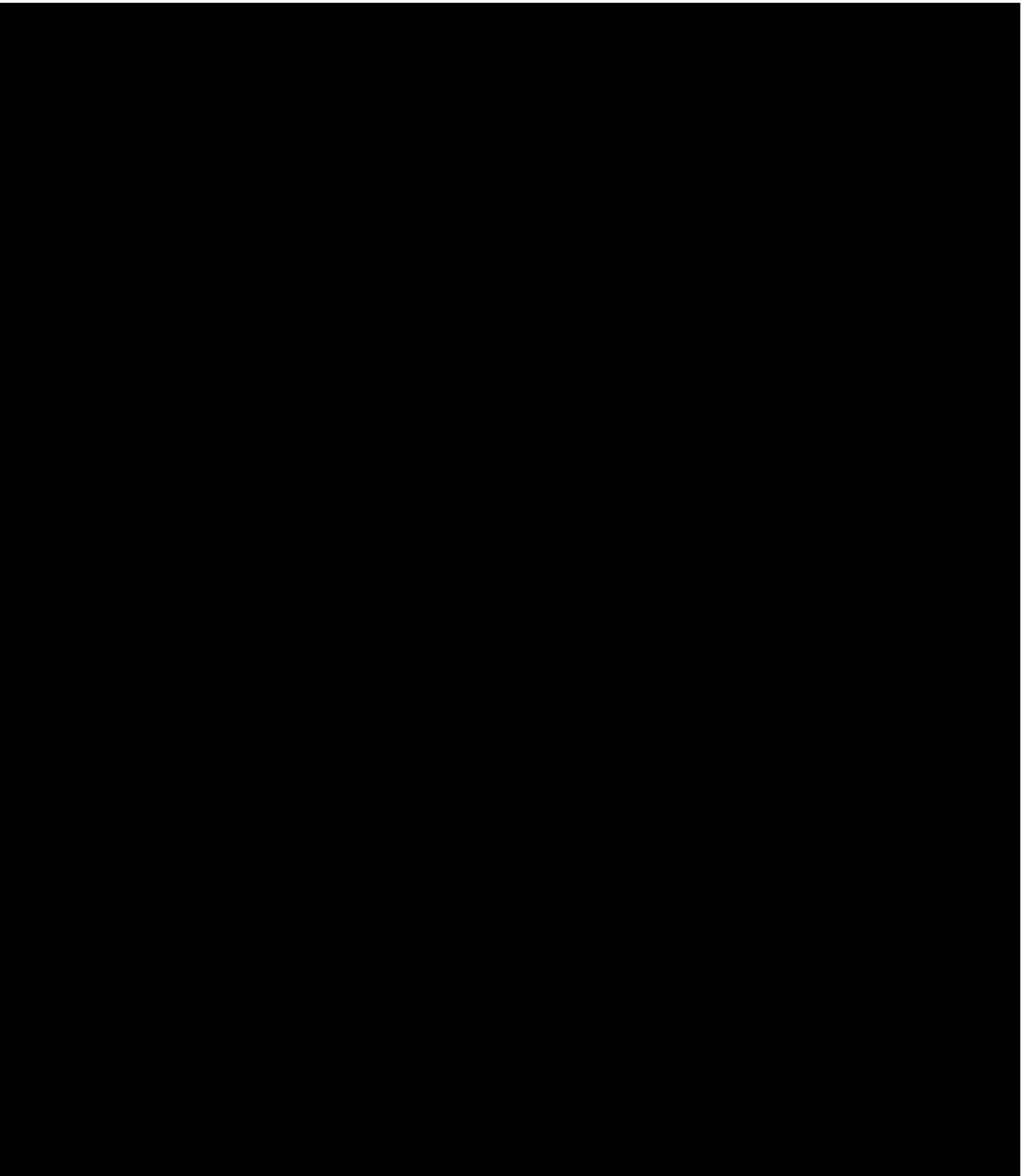


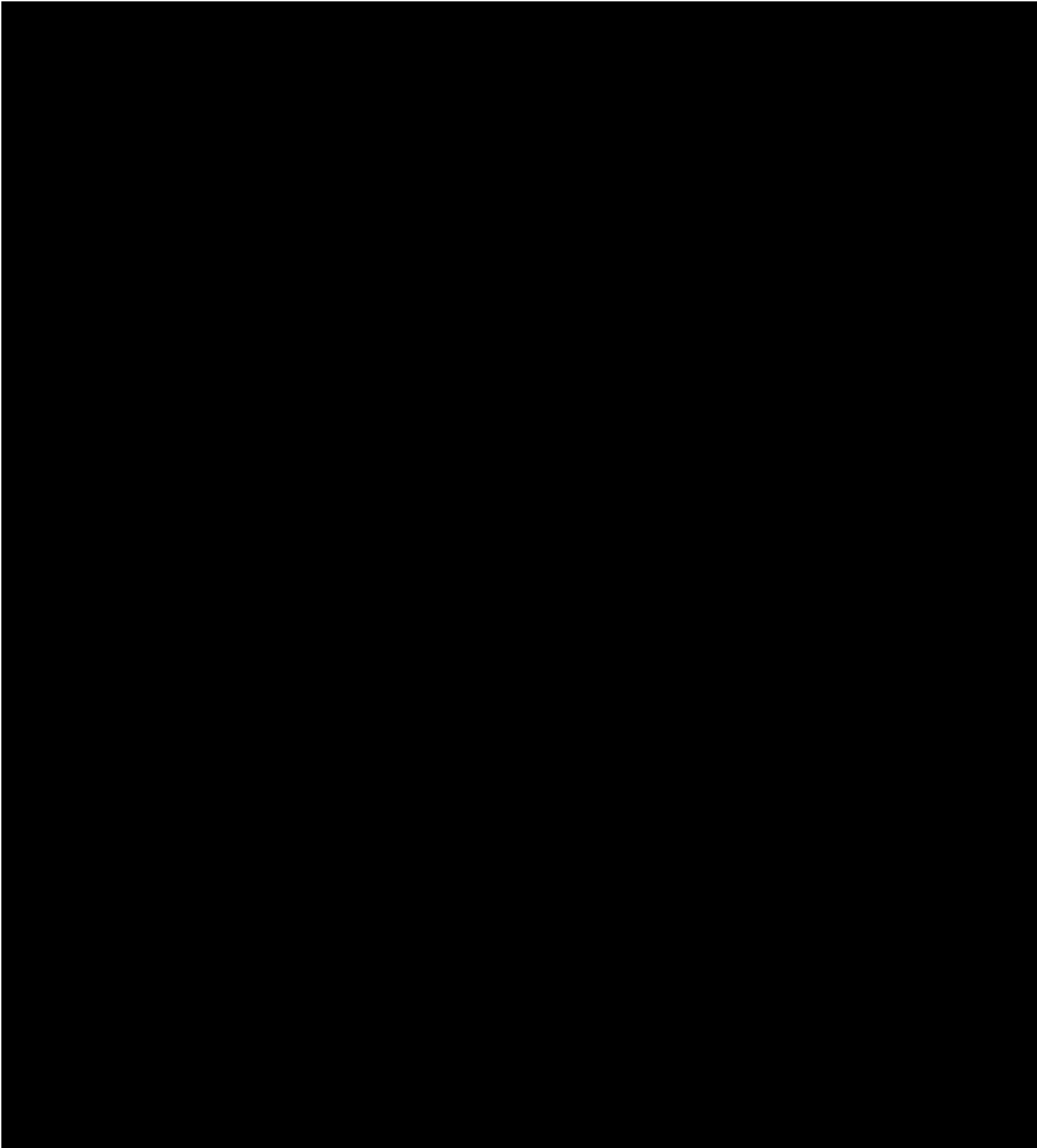












Name of Respondent:	ICAST
# of Units to Be Weatherized	1,324

Multifamily WAP - BIL funds PY24 - PY27

Budget Category	1/1/24 - 6/30/24	7/1/24 - 6/30/25	7/1/25 - 6/30/26	7/1/26 - 6/30/27	TOTAL	
	PY24	PY25	PY26	PY27		
Program Operations	\$423,697	\$2,754,030	\$3,389,576	\$4,025,121	\$10,592,424	72.28%
Health & Safety	\$105,924	\$688,508	\$847,394	\$1,006,280	\$2,648,106	18.07%
Administration	\$56,559	\$367,633	\$452,471	\$537,310	\$1,413,973	9.65%
Total	\$586,180	\$3,810,171	\$4,689,441	\$5,568,711	\$14,654,503	100.00%
Unit Production Goal	53	344	424	503	1324	
Average Cost Per Unit (ACPU)	\$8,000	\$8,000	\$8,000	\$8,000	\$8,000	
% of Total Budget	4%	26%	32%	38%	100.00%	

Budget Category

Narrative (Optional)

Program Operations	Program operations funding include staff hours for non admin related programmatic work, and program operations contractor work. Over the course of the Program, this category makes up 72.28% of the total funding and scales up dollar amount as the programs unit production scales
Health & Safety	H&S constitutes the installation costs for H&S measures per unit produced. H&S as implemented would include H&S measures that help provide, maintain, or mitigate elements to promote healthy living in weatherized homes in alignment the NC WAP Health and Safety Plan.
Administration	ICAST requests the full administrative allocation for the program. This will help ICAST cover expenses related to administering the program, including insurance, audits, ancillary staff costs, and training-related costs.
Unit Production Goals	ICAST proposes scaling its unit goals in a ramp up per year. ICAST frequently and successful does this for many of its programs. A telling example would be its low income utility program in Utah, which first year served ~950 households, and by year three served over 10,000 households.

Ravi Malhotra

Position: Founder and President

Professional Start Date: 1988
ICAST Start Date: 2002

Education

- MBA, University of Texas at Austin, 1999
- M.S. in Engineering, University of Texas at Austin, 1993
- B.S in Engineering, Indian Institute of Technology, 1988

Memberships & Awards

- Member of Western Governor Association’s Solar and BioEnergy Task Force
- Chair of Board – Colorado Energy Efficiency Business Coalition
- Guest Lecturer at universities, including University of Colorado, Colorado School of Mines, and Colorado

Employment History

TBL Fund	2013-Pres.
ICAST	2002-Pres.
Tulna, INC.	2000-2002
XeTel Corp.	1995-2001
Summagraphics Corp.	1994-1995
VTEL Corp.	1993-1994
Development Alternatives	1988-1992

Profile

Ravi Malhotra has 35 years of experience and is an experienced engineer and social entrepreneur who has established a variety of enterprises in India, Africa, and the US with an emphasis on sustainable technologies.

Work Experience

President, ICAST, Denver, CO, 2002-Present – Founded ICAST in 2002, a 501 (c)(3) nonprofit focused on providing sustainable development by helping utilize local resources for local benefits. He launched the One Stop Shop Green Rehabilitation Program in 2010 and oversee operations in the states in which it operates, including Colorado, Utah, New Mexico, Missouri, Connecticut, and Washington D.C.

President, TBL Fund, Denver, CO, 2013-Present— Founded the Triple Bottom Line Foundation (TBL Fund) in 2013, a 501(c)(3) Community Development Financial Institution (CDFI) focused on offering financial products and services to affordable housing and community facilities in low-income communities, preserving affordable housing and creating jobs. He is a board member and oversees day to day operations of the company.

Renova Capital, Lakewood, CO— Founded Renova Capital, a clean technology commercialization investment firm focused on launching start-ups in the Clean Energy and Waste Utilization space.

MainStreet Power Company, Lakewood, CO, 2010-2015— Founded and launched MainStreet Power Company, a solar PV development firm. He grew the company and completed more than 200 million of solar PV installations, before the company was acquired by a much larger energy production corporation.

Mark Allen Ducote

Position: Construction Manager

Education

BS Building Construction (May 2010) Georgia Institute of Technology, Atlanta, GA

Memberships & Awards

OSHA 30 Hours Certified

Employment History

KTK General	2016-Pres.
Nordic PCL	2010-2016
Pipeline Utilities	2000-2002

Profile

Mark has 13 years of experience in the field of construction and management.

Work Experience

Construction Manager, ICAST, Denver, CO – Founded in 2002, ICAST is a 501 (c)(3) nonprofit focused on providing sustainable development by helping utilize local resources for local benefits. Mark serves as a construction manager.

Project Manager, KTK General Contracting, Denver, CO— Tennant Finish, Improvement, and Ground-Up Projects: \$5,000 - \$2,000,000. Pursued, Established and Maintained Client Relations and Satisfaction. Assisted with Bidding and Pre-Construction. Managed all Pre-Construction Requirements. Supported Field Supervision with Issue Prevention, Design Solutions and Contractor Coordination. Enforced Fast Paced Schedule Commitments during Concurrent Construction and Business Operations. Remained Available as Source of Communication and Primary Coordinator between Clients, Construction and Business Management Teams and General Contractor. Created and Oversaw Change Orders, Pay Applications and Regular Invoicing.

Site Superintendent, Multi-Tenant Core and Shell with Multiple Tenant Finishes: \$2.8 Million. Developed and Managed Project Schedule and Delivery Schedule. Coordinated All Field Activity. Ensured Code/Design Accuracy and Quality of Installations. Submitted RFIs, Submittals and Other Project Documentation. Assisted with Permitting, Billings, Change Orders, Subcontracts.

Starbucks New Build Projects: \$1 Million – Developed and Managed Project Schedule and Delivery Schedule. Coordinated All Field Activity. Ensured Code/Design Accuracy and Quality of Installations.

Max Wilkinson

Position: Special Projects Manager

Professional Start Date: 2012
ICAST Start Date: 2020

Education

- Bachelor of Applied Science in Environmental Sciences from the University of Wisconsin – Green Bay

Licenses and Certifications

- Healthy Homes Evaluator
- OSHA 30
- EPA Lead Risk Inspector
- Registered PECFA Consultant

Employment History

ICAST 2020 - Present
NRP Environmental 2016 - 2020
Consultants
Funny Farm Productions – 2012 – Present

Profile

Max Wilkinson has over 10 years' experience in the green building industry, including contractor oversight and budget tracking. Prior to joining ICAST, Mr. Wilkinson was an environmental scientist and consultant who managed state and federal regulatory compliance for various clients, of an environmental firm. Mr. Wilkinson is a registered PECFA consultant with experience completing Phase I/II Environmental Site Assessments.

Work Experience

Special Projects Manager, ICAST, Denver, CO 2020-2022, 2023 - Present

Responsible for developing/implementing special projects.

Healthy Homes Program Manager, ICAST, Denver, CO 2022-2023

Responsible for developing and implementing an integrated WAP and healthy homes/lead hazard control program.

Construction Project Manager, ICAST, Denver, CO 2018-2020

Responsible for providing oversight of the budget, schedule, subcontractors, and materials of all DI, EEM rehab projects for multifamily housing properties. Provided direction and support to subcontractors and worked closely and collaboratively with others within ICAST to ensure successful project completion. Provided weekly updates, verbal and written, to management to highlight progress and issues.

Environmental Scientist, NRP Environmental Consultants Inc., Green Bay, WI, 2016 -2020

Responsible for field work, contractor coordination and oversight, and budget tracking. Completed Phase I/II Environmental Site Assessments, including soil, ground/surface water sample collection. Responsible for administrative code and standard research, pre-demolition building inspections, field elevation surveys, client consultations, and meetings with regulatory personnel. Served as a Wisconsin Certified Tank System Site Assessor and Registered PECFA Consultant.

Marshall Mason

Position: Senior Energy Auditor

Work Experience

Senior Energy Auditor, ICAST, Denver, CO, 2022-Present— Responsible for acting as lead in WAP energy audits, performing energy audits/QCIs, the development of scopes of work on New Mexico projects, and assisting construction management when appropriate

Weatherization Coordinator; Residential Energy Auditor; Quality Control Inspector; Healthy Homes Practitioner; HCV Housing Inspector, Jefferson Franklin Community Action

Corporation (CAC), Hillsboro, MO, 2009-2022 — Coordinated and oversaw operations for WAP, including training and management. Performed quality control inspections and audits for WAP according to DOE, SWS, local, and regional utility provider guidelines. Developed, administered, and managed field operations for the Energy Efficiency and Safety Program. Performed home assessments, facilitated building retrofits, and educated clients to become more responsible in their energy usage and home maintenance. Developed an effective and cohesive inspection staff for HUD Section 8 program. Combined evaluating staff performance regarding inspection with the focus on conformity, organization and communication to increase quality of field inspections to maintain high SEMAP scores. Improved the quality and safety of regional housing stock by my contribution of rent assessments, surveys, fieldwork, and community interaction and education. Directed independent research of the green energy industry to develop and institute innovative energy conservation techniques applied to repair client’s homes following EAP guidelines, OSHA, and PPE regulations. Featured guest expert on multiple regional radio programs and seminar appearances to educate the public about the weatherization program and maintaining their homes through healthy lifestyle choices and promoting energy efficiency.

Employment History

ICAST	Denver, CO	2022-Present
Jefferson Franklin CAC	Hillsboro, MO	2009-2022
Champion Floor Company	St. Louis, MO	2003-2009
Stephens Floor Company	St. Louis, MO	2000-2002
ACI Boland Architects	St. Louis, MO	1999-2001

**Professional Start
Date: 1999
ICAST Start Date:
2022**

Education:

Business Administration and Management, Jefferson College

Certifications/Skills:

Healthy Homes Practitioner/Specialist
Lead Renovator
Energy Auditor, Quality Control Inspector, and Building Analyst
Professional - BPI
WEA Quality Control Inspector
HUD HCV Housing Standards Specialist
Infrared Thermography Inspection Training

Monica Paici

Position: Director of Marketing

Professional Start Date: 1997
ICAST Start Date: 2018

Education

B.S. in Marketing, California Polytechnic University at Pomona, 1988

Certificate in Beverage Management: Hospitality Management, Metropolitan State College, 2016

International Marketing Certificate, Copenhagen University, 1986

Employment History

ICAST	2018-Present
Paici & Associates	2018
PIN Business	2016-2017
Tony's Market	2006-2016
Colorado Business	2005-2006
Universal Lending	1999-2005
United Recyclers	1997-1999

Profile

Serving as the Director of Marketing at ICAST, Monica takes on challenging responsibilities, such as branding, utility marketing and project management. With 30+ years in the marketing world, she has a practiced hand that creates solutions for even the most difficult of projects.

Work Experience

Director of Marketing, ICAST, Denver, CO, 2018-Present – Develop and implement marketing plans, including promotional calendars and programs, new product introductions and other marketing projects. Oversee the operation of a company's website or email marketing program and provide analytics review. Responsible for editorial direction, design, production, and distribution of all ICAST publications.

Marketing Professional, Paici & Associates, Littleton, CO, 2018 – Managed marketing activities for a real estate appraisal company.

Internal Marketing Director, PIN Business Network, Denver, CO, 2016-2017 – Managed projects including: brand management, executive, internal, and marketing communications and public relations for a data-driven marketing firm. Created and developed comprehensive branding standards, providing the company with a consistent global message. Designed and maintained company website and social media assets.

Marketing Manager, Tony's Market, Centennial, CO, 2006-2016 – In charge of advertising, social marketing, direct mailers, website and promotions for retail food establishment and catering division. Tracked and measured the effectiveness of all advertising campaigns. Disseminated strategic and tactical product information to management with respect to education, market conditions, and merchandising.

Communications Specialist, Colorado Business Bank, Denver, CO, 2005-2006 – Managed budgeting, placement, developing, writing and production. Oversaw production of all company collateral.

Marketing Director, Universal Lending Corporation, Denver, CO, 1999-2005 – Strategically developed and managed all advertising and marketing programs for B2B and B2C programs. Managed a \$1 million-dollar marketing and advertising budget. Created and produced all TV, radio, print advertising and sales collateral.

Marketing Director, United Recyclers Group, LLC, Denver, CO, 1997-1999 – Editor of a monthly magazine distributed to over 20,000 recipients in the auto industry. Managed all advertising design and placement.

Jeff Hargis

Position: Technical Services Director

Education:

- Bachelor of Science, Electrical Engineering, Ohio State University
- Master of Engineering, Electrical and Computer Engineering, University of Colorado/Boulder

Accolades:

Holder of 8 US patents in the areas of memory controller ASIC designs and chip packaging

Employment History

ICAST	2019-Pres.
Engineers Without Borders	2018-2019
Trees, Water, & People	2013-2019
Hewlett Packard	1997-2012

Profile

Jeff received his BS in Electrical Engineering from Ohio State and his master's in electrical engineering from the University of Colorado. Jeff worked in computer development at Hewlett Packard for 20+ years as an electrical engineer and engineering manager.

Project Experience

Technical Services Director, ICAST, 2019-Present – Improve all aspects of project planning and resource management. Determine and define clear deliverables, roles and responsibilities for staff members required for specific projects or initiatives. Oversee the daily tasks of technical personnel while ensuring all subordinates are actively working toward established milestones. Address any questions or challenges regarding projects.

Project Team Lead, Engineers without Borders, 2018-2019 – Lead for local chapter and for projects to rehabilitate and expand the water systems for communities in Central America. Traveled to Guatemala and led highly successful completion of water project. On track to double the project implementation rate of chapter. Helped chapter to established excellent track record of meeting HQ policies and deadlines. Built strong relationships with EWB-USA HQ and with local in-country NGO partner. The team exceeded fundraising goals, and the project was completed below budget.

Board Member/Board President, Trees, Water, & People, 2013-2019 – Elected as board president in 2018, served as Board Secretary 2016-17. As Board, President I lead the quarterly board meetings and support the organizations Executive Director. Served as chair of National Program Committee 2014-17. This committee has made substantial contributions to the completion of projects at the Pine Ridge Indian Reservation. Contributed design work and project



management in the development of the Off Grid Solar Furnace, a product of Lakota Solar Enterprises, a Native-owned company at Pine Ridge.

Audrey Knox

Position: Workforce Training Manager

Professional Start Date: 2001
ICAST Start Date: 2023

Education

- Bachelor of Arts in Sociology
West Chester University - West Chester, PA. 2001

Memberships & Awards

- Member, The Ecology Center's Climate Action Coalition
- Community Choice Energy Working Group
- Member, California Science Teachers Association

Profile

An experienced Project Manager with expertise in designing and overseeing nonprofit environmental program implementation, including budget management, developing, and writing successful grant and Request for Funding Proposals, designing curriculum, and delivering education workshops.

Work Experience

Workforce Training Manager, ICAST, Current

She is dedicated to supporting climate literacy and action, with over a decade of experience managing the implementation of nonprofit environmental programs, designing, and facilitating professional development training workshops, and writing sustainability curriculum.

Programs Coordinator Wildlife Conservation Network - San Francisco, CA. 2022

As an Operations Coordinator at the Junior Center of Art and Science in Oakland, CA since August 2019, I've been involved in a diverse range of responsibilities. These include creating compelling content for blog posts and monthly newsletters, managing vital agreements with our partners, and offering logistical support to our Conservation Programs team. Furthermore, I oversee the day-to-day operations of this community-based arts and science education center, handling everything from membership relations to donor engagement and marketing efforts. I also design enriching educational experiences for K-5 students visiting the center for field trips, blending art and science seamlessly.

Project Manager (Education & Training Department) The Energy Coalition (Oakland, CA) - 2018

Managed contracts for three energy and environmental programs, impacting 25,000+ students in California and Nevada, with a focus on disadvantaged communities. Responsibilities included budgeting, educator training, program implementation, marketing, client relations, and

reporting. Oversaw partnerships for the Education & Training department, authored curriculum, and led STEM-based afterschool programs across 40+ sites in the Bay Area and Sacramento. Supervised a team of five and mentored AmeriCorps Climate Corps Fellows. Successfully secured contracts and grants, including a NOAA-funded school water-savings campaign.

Project Coordinator the Energy Coalition - Oakland, CA - 2013

Supported implementation, marketing, and admin for various energy and environmental programs. Spearheaded recruitment and organization of educator professional development workshops, both virtual and in-person. Maintained educator and partner communications, offering ongoing instructional support. Crafted and executed energy and water savings initiatives for students and educators, alongside producing quarterly program newsletters. Responsible for compiling quarterly and annual reporting metrics.

Project Coordinator CRA, Inc. - Berwyn, PA - 2010

Facilitated outreach efforts, crafted presentations and materials, and managed logistics for peer-group networks of Employee/Internal Communication leaders. Offered copy-editing services for marketing materials and correspondence. Assisted in scheduling and communication tasks on behalf of the President and Managing Partners.

Danielle Marie Hicks

Position: Construction Project Coordinator

Years of Professional Service: 30

Certifications

QuickBooks Online Certification

Additional Skills

- Sage Accounting/Master Builder
- Service Titan

Profile

A highly skilled construction and project management professional with extensive experience in coordinating construction projects, managing office operations, and ensuring customer satisfaction in the HVAC and homebuilding industries.

Work Experience

Construction Project Coordinator, ICAST,

Current – Danielle Jordan has spent the majority of her 30-year career in the construction industry, specifically in the residential new home building market and in HVAC service. She has brought her vast experience in Construction Administration and Project Coordination to the ICAST team.

Construction Coordinator, Lifestyle Homes - Asheville, NC, 2022

Construction Coordinator for a custom home builder. Responsibilities included contract management, permitting, purchasing, accounts payable and job costing, bid and scope of work review, and subcontractor scheduling.

Lead Service Coordinator, TWC Services - Tampa, FL, 2021

Service Coordinator for an HVAC service company. Responsibilities included daily scheduling of all service and project work for 20+ technicians, maintaining weekly reports, working closely with Service Managers to maintain a high level of customer satisfaction, management of fleet maintenance, and parts management.

Office Manager, Breckenridge Mechanical - Breckenridge, CO, 2018

Office Management of an HVAC company. Responsibilities included office management, scheduling of all service and project work, Human Resources, approval of all customer billings, accounts

receivable & payable, Preventative Maintenance program management, and acting as the main contact point for higher-end client base.

Construction Site Manager, Thomas Group Communities - Marietta, GA, 2001

Planned, organized, and managed day-to-day field operations for a community of luxury, ranch-style condominium homes. Responsibilities included Human Resources (hiring and managing staff from Superintendent to office personnel), preparation of construction documents, contracts, subcontractor selection, scheduling, project budget, quality control. In addition, was responsible for approving subcontractor invoices and payments to keep the project on budget. Conducted homeowner walkthroughs and implemented a new warranty program and software for the community.

Homeowner Relations & Warranty Manager, WCI Communities - Bonita Springs, FL, 1996

Established a new division of Homeowner Relations for a premier builder of luxury, master-planned communities. Planned, researched, & implemented a new warranty program including computerized software response systems. Served as the Liaison between the Construction team and Homebuyer throughout the building process. Responsible for establishing a good rapport between both parties. Once construction was completed, was responsible for taking over all homeowner contact & ensuring a timely response to warranty repairs. Hired & managed a warranty team of five employees. Reported to the President of Construction in briefing meetings.

Earlena Brown

Position: Training Specialist

Education

Master of Arts in Clinical Counseling, 1995 Webster University, SC
Bachelor of Arts in Special Education, 1982 Lynchburg College, VA

Certifications

Everything DiSC® Authorized Partner
Everything DiSC® Trainer
TWI Job Instruction certification
Red Cross Instructor certification
Crucial Conversations Trainer certification
MBTI Trainer certification
TWI Job Relations Trainer certification

Additional Professional Experience:

- Adjunct Faculty (Online) at University of Phoenix, Phoenix, AZ (January 2006 – June 2014).
- Outside Sales/Enrollment Manager and Outside Sales Rep at Grand Canyon University, AZ (July 2006 – July 2010).
- Sales Manager of the Year (2008).
- Student Services Coordinator, Site Assistant, and Adjunct Faculty (part-time) at Southern Wesleyan University, N. Charleston, SC (July 2001 – July 2006).
- Advised students pertaining to enrollment and career options.
- Conducted new student orientation.
- Provided pre-admission and transition advising.

Profile

A versatile professional with over 20 years of experience in Learning & Development, teaching, sales, and training coordination. Certified in various training programs, with expertise in curriculum development and adult learning principles.

Work Experience

Training Specialist, ICAST, Current

Responsible for managing, developing, coordinating and conducting all training programs including onboarding of new staff and on-going professional development programs managed by ICAST.

Onsite Trainer, Blattner Energy Inc, Avon MN, 2022

Responsible for planning and conducting employee training, including new hire orientation, onboarding, site safety orientation, and software training for all jobsite personnel. Evaluate training effectiveness and identify training solutions to field leadership. Assist with organizational and project-specific training needs through collaboration with corporate personnel. Train to meet performance deficiencies to maintain certifications, licenses, etc. Serve as a liaison between the field and home office departments, communicating new training, updates, or changes to training programs and supporting with the completion of those updates. Conduct training audits by measuring training effectiveness, training methodologies, accountability of programs.

Training Consultant, Dynamic Solutions for Change LLC, Santee, SC, 2000 – Present (Contract)

Collaborate with decision-makers and senior leadership to identify and assess company needs. Apply understanding of business functions and processes to develop training curriculum and materials. Assess company training needs through gap analysis and needs assessment methods to

improve organization performance. Design, develop, implement, and evaluate training programs (ADDIE).

Responsible for the content management and administration of the Learning Management System (LMS). Develop training curriculum and training materials (manuals, guides, PowerPoint, etc.). Training delivery including instructor-led (ILT), virtual, e-learning, OJT, webinar, etc. according to adult learning principles.

Training Coordinator, Zeus Industrial Inc, Orangeburg, SC, 2019

Identified and supported SMEs in developing and implementing training for sales and manufacturing staff. Designed, developed, and implemented sales, soft skills, leadership, new hire, and other corporate training, as needed. Managed and maintained content of Learning Management System (LMS). Researched/recommended new training content identified through the needs assessment/gap analysis to identify instructional objectives to meet corporate goals. Collaborated with various departments to develop training content (i.e. sales, finance, manufacturing). Evaluated training effectiveness using the Kirkpatrick Model of Evaluation.

Education and Training Manager Bamberg Job Corps, Bamberg, SC, 2012

Supervised education and vocational instructors. Planned, coordinated, and directed training and development programs for vocational and education staff. Worked with local mental health agencies to identify admission criteria. Teacher Certification Specialist

American Board for Certification of Teacher Excellence, 2011

Coordinated and conducted recruitment events statewide. Developed strategies to generate new business and leads. Conducted outreach to local community-based organizations to help aid program expansion. Secured partnerships with district Superintendents and HR Directors.

Keesha M. Johnson

Position: Weatherization Program Manager

Professional Start Date: 2002
ICAST Start Date: 2023

Education

University of Phoenix Online -
2011

Degree: Masters of Management
University of Phoenix Online -
2009

Degree: Bachelor of Science in
Business Management
Axia College of University of
Phoenix Online - 2007

Memberships & Awards

President of the Weatherization
Council for the state of Georgia

IT professional for Hancock
reporting system for the state of
Georgia

Certificate

- OSHA 30 Hours
- Lead Renovator-EPA
(expiration date 07/13/2026)

Profile

Keesha M. Johnson is a highly experienced professional with over two decades of leadership and organizational management expertise. She has a strong track record of collaborating with diverse partners, stakeholders, and state programs to effectively address project and program needs. Keesha has a proven history of successful grant writing and planning, particularly with federal programs. She holds the prestigious position of President of the Weatherization Council for the state of Georgia and serves as an IT professional for the Hancock reporting system, further demonstrating her dedication to improving her community and state.

Work Experience

WAP Manager, ICAST, Current (2023) – Managers current and upcoming Weatherization Assistance Programs with State and existing WAP service providers that ICAST is contracted to serve.

Weatherization Director, CSRA EOA, INC. (2006)

Developed and presented policy and program recommendations to the Executive Director. Extensive grant writing, leadership, and management experience. Procurement responsibilities, including reviewing all RFP's and RFQ's for Agency Compliance. Created and distributed state reporting forms for the State Weatherization Assistance Program. Implemented cost-cutting measures to reduce daily operating costs by 30% while enhancing services. Established and maintained strong community networks through interactions with State and Local networks and business partners. Analyzed proposed legislation and regulations for their impact on program management. Attended conferences and workshops to stay informed about DOE regulations related to Weatherization. Oversaw Multi-Family projects for compliance and budget adherence. Worked with OMB Circulars.

Weatherization Program Assistant, CSRA EOA, INC. 2006

Managed office, managerial, and logistical responsibilities for the program.

Handled requisitions, purchase orders, and job cost tracking.

Coordinated travel arrangements for program staff.

Established and maintained confidential record-keeping systems.

Provided technical assistance to work crews.

September 12, 2023

Mr. Matthew Davis
Weatherization Supervisor
North Carolina Weatherization Assistance Program (NCWAP)
North Carolina Department of Environmental Quality
217 West Jones Street, 1613 Mail Service Center
Raleigh, North Carolina 27699-1613

Dear Mr. Davis:

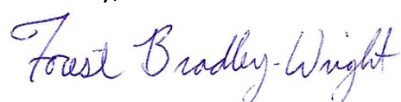
I am writing on behalf of the Southern Alliance for Clean Energy (SACE) to express our enthusiastic support for ICAST's (International Center for Appropriate and Sustainable Technology) proposal to the North Carolina Department of Environmental Quality for the state's Weatherization Assistance Program (NC WAP). We believe ICAST's unparalleled expertise in the field of energy efficiency and managing statewide WAP uniquely qualifies them to be the state's multifamily service provider for the NC WAP.

SACE promotes responsible and equitable energy choices to ensure clean, safe, and healthy communities throughout the Southeast. We support energy efficiency programs to reduce customer utility bills and stimulate local job creation. SACE is committed to ensuring the benefits of energy efficiency are equitably distributed, especially for those who struggle with the cost of their monthly energy bills. Our successful advocacy with Duke Energy and the North Carolina Utilities Commission has led to tens of millions of dollars of new investment in energy efficiency for low income households, but much more is still needed – particularly for residents of multifamily affordable housing. With over two decades of experience in energy efficiency, renewable energy, and health and safety upgrades in multifamily affordable housing (MFAH), ICAST has a demonstrated track record designing and managing multifamily WAP and utility demand-side management programs across the United States. We are confident they can effectively manage and implement the multifamily NCWAP.

ICAST's extensive network of MFAH owners and managers, coupled with their dedication to serving low-income households, positions them as the ideal partner to address the energy efficiency needs of vulnerable populations in North Carolina. As NC WAP seeks to enhance its programmatic outcomes, innovate its approach, and serve more low-income households, we believe ICAST's proven expertise aligns seamlessly with these goals. We also believe their work will drive market transformation for this vital housing segment, thereby helping to ensure renters in affordable housing will be served beyond this one time infusion of federal funds.

SACE commends your dedication to affordable and equitable energy access and believes ICAST's involvement will greatly contribute to the success of the NC WAP multifamily initiative. We look forward to the positive impact ICAST will bring to North Carolina's multifamily affordable housing sector through the NC WAP.

Sincerely,



Forest Bradley-Wright
Dir. of Energy Efficiency Programs, SACE
forest@cleanenergy.org



September 7, 2023

North Carolina Department of Environmental Quality (NC DEQ)
217 West Jones Street
Raleigh, NC 27603

To the North Carolina Department of Environmental Quality Application Review Team,

Charlotte Mecklenburg Climate Leaders are pleased to provide this letter in support of ICAST's multifamily WAP application to the NC DEQ. Charlotte Mecklenburg Climate Leaders, a broad coalition of environmental organizations, believes ICAST's experience and skills will be crucial to the development of multifamily WAP, given its expertise in green workforce development and previous efforts to assist the Charlotte-Mecklenburg region.

Founded in 2018, Charlotte Mecklenburg Climate Leaders represents over 30 organizations dedicated to improving the health of our communities by advocating for clean energy and carbon-reducing strategies.

We request that you select ICAST as an awardee for this program because they have a unique and innovative approach and the requisite experience and connections to successfully implement WAP services in North Carolina.

Sincerely,

The Charlotte Mecklenburg Steering Committee



Charlotte-Mecklenburg NAACP Branch #5376
PO BOX 560786
Charlotte, NC 28256

9/8/2023

North Carolina Department of Environmental Quality (NC DEQ)
217 West Jones Street
Raleigh, NC 27603

To the North Carolina Department of Environmental Quality Application Review Team,

The Charlotte-Mecklenburg National Association for the Advancement of Colored People (NAACP) chapter is pleased to provide this letter in support of ICAST's multifamily WAP application to the NC DEQ. The Charlotte Mecklenburg NAACP believes ICAST's experience and skills will be crucial to the development of multifamily WAP, given its expertise in green workforce development, and previous efforts to assist the Charlotte-Mecklenburg region.

Founded in 1909, the NAACP is the nation's oldest and largest civil rights organization. Its members throughout the United States and the world are the premier advocates for civil rights in their communities. The vision of the NAACP is to ensure a society in which all individuals have equal rights and there is no racial hatred or racial discrimination. To that end, the Charlotte-Mecklenburg NAACP and tackling environmental racism by implementing and supporting environmental and climate justice efforts, of which green workforce development is a key piece.

I request that you select ICAST as an awardee for this program because I believe they have a unique and innovative approach, as well as the requisite experience and connections to succeed in implementing WAP services in North Carolina.

Sincerely,

Corine Mack

Charlotte Mecklenburg NAACP President



2201 Brentwood Dr.
Suite 109
Raleigh, NC 27604
919.341.5980

September 12, 2023

Mr. Matthew Davis
Weatherization Supervisor
North Carolina Weatherization Assistance Program (NCWAP)
North Carolina Department of Environmental Quality
217 West Jones Street, 1613 Mail Service Center
Raleigh, North Carolina 27699-1613

Dear Mr. Davis:

On behalf of Rebuilding Together of the Triangle (RTT), I would like to express our interest in partnering with ICAST (International Center for Appropriate and Sustainable Technology) should their proposal to the North Carolina Department of Environmental Quality for the state's Weatherization Assistance Program (NCWAP) be accepted. We believe ICAST's expertise in the field of energy efficiency and sustainable technology uniquely qualifies them to serve as the state's multifamily service provider for the NCWAP and we look forward to working with them to serve vulnerable North Carolinians.

RTT is a local affiliate of Rebuilding Together, the nation's largest nonprofit organization working to preserve affordable homeownership and revitalize neighborhoods by providing home repair and renovation services free of charge to those in need. RTT serves underserved households in Wake, Durham, Orange and Chatham counties. Working with ICAST as a local general contractor would allow RTT to help serve a greater number of disadvantaged residents with limited access to energy upgrades that could help improve the health, safety, and energy efficiency of their homes. More than a million North Carolinians living at or below the federal poverty level struggle to pay their energy bills and the NCWAP is a lifeline to help them improve their homes and reduce their energy costs now and in the future. With over two decades of experience in energy efficiency, renewable energy, and health and safety upgrades in multifamily affordable housing (MFAH), ICAST has a demonstrated track record of designing and managing multifamily WAP and utility demand-side management programs across the United States. We are confident they can effectively manage and implement the multifamily NCWAP and welcome the opportunity to work with and learn from them.

ICAST's extensive network of MFAH owners and managers, coupled with their dedication to serving low- and moderate-income households, positions them as the ideal partner to address the energy efficiency needs of residents of multifamily affordable housing (MFAH) properties in North Carolina. As the NCWAP seeks to enhance its programmatic outcomes, innovate its approach, and serve more low-income households, we believe ICAST's proven expertise aligns seamlessly with these goals. RTT believes ICAST's experience delivering WAP to MFAH properties will greatly contribute to the success of the NCWAP multifamily initiative and look forward to the positive impact ICAST will bring to North Carolina's multifamily housing sector through the NCWAP. Thank you for your consideration.

Sincerely,

Dan Sargent
Executive Director

A handwritten signature in blue ink, appearing to read "Dan Sargent", with a long horizontal flourish extending to the right.

Repairing Homes. Revitalizing Communities. Rebuilding Lives.



September 5, 2023

Mr. Matthew Davis
Weatherization Supervisor
North Carolina Weatherization Assistance Program (NCWAP)
North Carolina Department of Environmental Quality
217 West Jones Street
1613 Mail Service Center
Raleigh, North Carolina 27699-1613

Dear Mr. Davis:

BLDG Partners is pleased to submit this letter in support of ICAST's (International Center for Appropriate and Sustainable Technology) multifamily submission to the North Carolina Weatherization Assistance Program (NCWAP).

Our past work with ICAST has created a profound impact on the lives of our residents and the greater community. The ICAST team have been tremendously respectful of our residents and are a best-in-class operation. Their professionalism and particular expertise in working with the special needs and lower income households make ICAST uniquely suited to the development of a multifamily weatherization program in North Carolina.

BLDG Partners has been ambitiously pursuing green upgrades and weatherization in all our low-income communities to reduce the energy burden on our residents and to reduce the carbon footprint of our communities. There are 150 low-income and special needs households in our communities in North Carolina that could benefit from weatherization services. We would appreciate the opportunity to work with NCWAP and ICAST to engender a safe, healthy, and energy-efficient environment for our residents.

We encourage you to select ICAST's multifamily WAP proposal to help us better serve our residents and inspire positive change in the multifamily communities of North Carolina.

Sincerely,

A handwritten signature in black ink, appearing to read 'Matthew Jacobs', followed by a horizontal line.

Matthew Jacobs
Principal, BLDG Partners LLC



September 13, 2023

Mr. Matthew Davis
Weatherization Supervisor
North Carolina Weatherization Assistance Program (NCWAP)
North Carolina Department of Environmental Quality
217 West Jones Street
1613 Mail Service Center
Raleigh, North Carolina 27699-1613

Dear Mr. Davis:

Lincoln Avenue Communities is pleased to provide this letter in support of ICAST's (International Center for Appropriate and Sustainable Technology) multifamily submission to the North Carolina Weatherization Assistance Program (NCWAP).

ICAST has a strong record of delivering weatherization services to multifamily affordable housing (MFAH) properties and currently provides statewide services in New Mexico, Utah, Connecticut, Tennessee, and Michigan. Given their familiarity and expertise in multifamily housing and weatherization, we believe ICAST's experience and skills are crucial to the development of multifamily WAP in North Carolina.

Lincoln Avenue Communities believes multifamily weatherization services are essential to helping reduce the energy burden and improving the comfort and well-being of low-income MFAH residents. NCWAP's focus on energy efficiency to enhance the health and safety of vulnerable populations resonates deeply with us. We currently own two affordable communities in North Carolina serving 248 low-income households that could benefit from weatherization services and would appreciate the opportunity to work with ICAST and NCWAP to improve the energy efficiency and health and safety of these units for our residents.

We encourage you to accept ICAST's multifamily WAP proposal to help us better serve the most vulnerable, low-income residents of North Carolina.

Sincerely,

A handwritten signature in black ink, appearing to read "Thom Amdur", written in a cursive style.

Thom Amdur
Senior Vice President, Policy & Impact

September 7, 2023

Mr. Matthew Davis
Weatherization Supervisor
North Carolina Weatherization Assistance Program (NCWAP)
North Carolina Department of Environmental Quality
217 West Jones Street
1613 Mail Service Center
Raleigh, North Carolina 27699-1613

Dear Mr. Davis:

Pennrose is pleased to provide this letter in support of ICAST's (International Center for Appropriate and Sustainable Technology) multifamily submission to the North Carolina Weatherization Assistance Program (NCWAP).

ICAST has a strong record of delivering weatherization services to multifamily affordable housing (MFAH) properties and currently provides statewide services in New Mexico, Utah, Connecticut, Tennessee, and Michigan. Given their familiarity and expertise in multifamily housing and weatherization, we believe ICAST's experience and skills are crucial to the development of multifamily WAP in North Carolina.

Pennrose believes multifamily weatherization services are essential to helping reduce the energy burden and improving the comfort and well-being of low-income MFAH residents. NCWAP's focus on energy efficiency to enhance the health and safety of vulnerable populations resonates deeply with us. We currently have approximately 243 households that could benefit from weatherization services and would appreciate the opportunity to work with ICAST and NCWAP to improve the energy efficiency and health and safety of these units for our residents.

We encourage you to accept ICAST's multifamily WAP proposal to help us better serve the most vulnerable, low-income residents of North Carolina.

Sincerely,



Ivy Dench-Carter
Sr. Vice President of Development



September 14, 2023

Mr. Matthew Davis
Weatherization Supervisor
North Carolina Weatherization Assistance Program (NCWAP)
North Carolina Department of Environmental Quality
217 West Jones Street, 1613 Mail Service Center
Raleigh, North Carolina 27699-1613

Dear Matthew,

I am writing on behalf of the Resources for Seniors, Inc to express our support for ICAST's (International Center for Appropriate and Sustainable Technology) proposal to the North Carolina Department of Environmental Quality for the state's Multi-family Weatherization Assistance Program (NC WAP). We believe ICAST's unparalleled expertise in the field of energy efficiency and managing statewide WAP uniquely qualifies them to be the state's multifamily service provider for the NC WAP. Resources for Seniors has been involved in multifamily projects with our local County Housing Authority and early experience with the State's first Multifamily initiative about a decade ago. We also completed the first Shelter weatherization project in the state here in Raleigh.

We feel that ICAST will promote equitable energy choices to ensure clean, safe, and healthy communities throughout the Southeast. We support energy efficiency programs to reduce customer utility bills and stimulate local job creation. ICAST is committed to ensuring the benefits of energy efficiency are equitably distributed, especially for those who struggle with the cost of their monthly energy bills. With over two decades of experience in energy efficiency, renewable energy, and health and safety upgrades in multifamily affordable housing (MFAH), ICAST has a demonstrated track record designing and managing multifamily WAP and utility demand-side management programs across the United States. We are confident they can effectively manage and implement the multifamily NCWAP.

Sincerely,

Mark Valletta
Director of Holding & Home Improvement
Resources for Seniors, Inc.
markv@rfsnc.org

Informed Choices for Maximum Independence



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

8/28/2023

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. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

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. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Arthur J. Gallagher Risk Management Services, LLC 210 University Blvd, #600 Denver CO 80206	CONTACT NAME: Dena Wolfe PHONE (A/C No, Ext): [REDACTED] FAX (A/C, No): [REDACTED] E-MAIL ADDRESS: [REDACTED]	
	INSURER(S) AFFORDING COVERAGE	NAIC #
INSURED ICAST (International Center for Appropriate and Sustainable Technology) 7400 W 14th Avenue, #101 Lakewood CO 80214	INSURER A: Hartford Accident and Indemnity Company	22233
	INSURER B: Trumbull Insurance Company	27120
	INSURER C: Hartford Casualty Insurance Company	29424
	INSURER D: Hartford Accident and Indemnity Company	22357
	INSURER E: Liberty Insurance Underwriters Inc	19917
	INSURER F:	

COVERAGES

CERTIFICATE NUMBER: 1081861938

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. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> 5,000 Deductible GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			[REDACTED]	4/1/2023	4/1/2024	EACH OCCURRENCE	\$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 300,000
							MED EXP (Any one person)	\$ 5,000
							PERSONAL & ADV INJURY	\$ 1,000,000
							GENERAL AGGREGATE	\$ 2,000,000
							PRODUCTS - COMP/OP AGG	\$ 2,000,000
								\$
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			[REDACTED]	4/1/2023	4/1/2024	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			[REDACTED]	4/1/2023	4/1/2024	EACH OCCURRENCE	\$ 7,000,000
							AGGREGATE	\$ 7,000,000
								\$
D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	[REDACTED]	4/1/2023	4/1/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT	\$ 1,000,000
							E.L. DISEASE - EA EMPLOYEE	\$ 1,000,000
							E.L. DISEASE - POLICY LIMIT	\$ 1,000,000
E	Professional Liability/E&O and Pollution Liability			[REDACTED]	4/1/2023	4/1/2024	Limit per Occurrence Aggregate Limit Deductible per Claim	2,000,000 2,000,000 5,000

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

Relevant coverage for weatherization services

CERTIFICATE HOLDER**CANCELLATION**

North Carolina WAP
 217 West Jones Street
 1613 Mail Service Center
 Raleigh NC 27699-1613

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

© 1988-2015 ACORD CORPORATION. All rights reserved.