

NORTH CAROLINA
Environmental Quality

December 12, 2023

ROY COOPER

Governor

ELIZABETH S. BISER

Secretary

JULIE WOOSLEY

Director

Mr. Michael Blair
Community Development Director
Piedmont Triad Regional Council
1398 Carrollton Crossing Drive
Kernersville, NC 27284

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

Dear Michael,

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 \$15,442,357 for "*Region 5*". 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 5*" 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, Piedmont Triad Regional Council 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 – Single Family PTRC

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
PTRC	74	92	94	87

Overall Comments

Overall PTRC did a great job detailing their experience with single-family weatherization retrofits in North Carolina. Their descriptions of workforce/career initiatives and programs was particularly impressive and detailed. It is clear that PTRC understands the complexities and intricacies of the single-family weatherization market in North Carolina, especially as it relates to low-income communities.

There were two questions (1 and 3) in which PTRC's responses merited a "*MOSTLY*" rather than "*ENTIRELY*". The application could have been stronger if PRTC would have cited their ability to work with NEAT/MHEA and had a further explanation on how they would leverage partners in implementing energy efficient and clean energy upgrades in the program.



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

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

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

ALL VENDORS:

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

The proposal consists of the following documents:

REQUEST FOR PROPOSAL

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I. Summary

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

II. Background

Low-income North Carolinians are faced with many multifaceted challenges including inflation, high energy and housing costs, and continued market impacts from the COVID-19 pandemic. The North Carolina Weatherization Assistance Program (*NC WAP*) aims to reduce these stressors by improving home energy efficiency, thereby fostering a healthier and more affordable life for North Carolina residents. Based on these initiatives, NC WAP has played a key role in not only decreasing energy costs for low-income persons, but also in reducing carbon emissions as well as providing and promoting jobs in clean energy.

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



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

The NC WAP is in search of weatherization agencies for both single-family and multifamily units that will participate in a cooperative home repair approach.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.

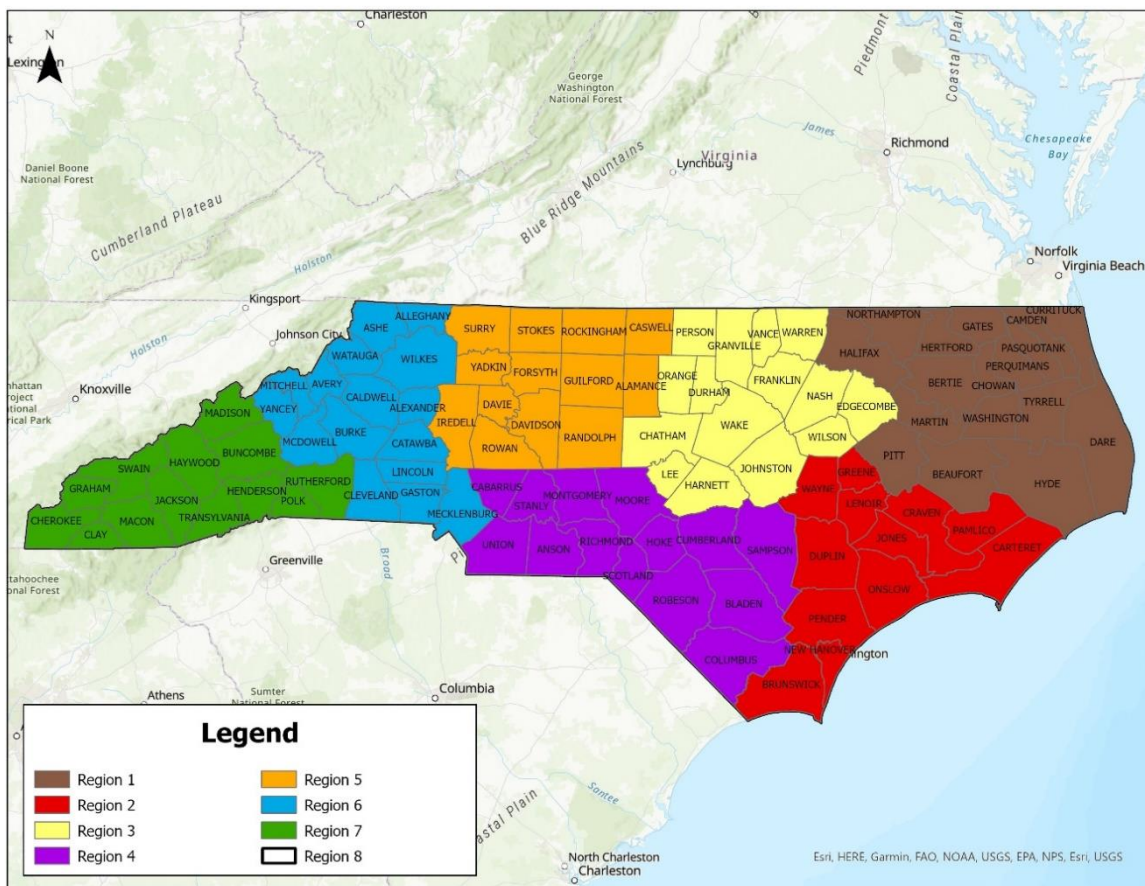


Figure 1. Map of North Carolina color coded by single family weatherization regions. Each region will house a collaborative hub that oversees weatherization and home upgrade services for eligible NC residents. Region 8 encompasses the entire state and is specifically for weatherization of

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



multifamily homes.

III. Statement of Need

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

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

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

IV. RFP Timeline

RFP activity	Time and Date
RFP Posted	9:00 am Friday, July 28, 2023
RFP Questions by Service Provider(s) Due	5:00 pm Wednesday, August 2, 2023
RFP Answers Posted by NC DEQ	5:00 pm Friday, August 18, 2023
RFP Due	5:00 pm Friday, September 15, 2023
Awards Selected	5:00 pm Friday, December 15, 2023

V. Funding Source

The Bipartisan Infrastructure Law (*BIL*) was enacted on November 15, 2021, with the Department of Energy (*DOE*) releasing specific guidance for NC WAP agencies under Weatherization Program Notice BIL 22-1 on March 30, 2022. Financial stimulus from the BIL will build on the historic strength of the NC WAP by elevating funding for the next five years. Federal BIL funding aligns with the North Carolina Clean Energy Plan (*CEP*) and will be utilized to help achieve the state's energy reduction goals of (1) decreasing electric power sector greenhouse gas emissions by 70% below 2005 levels by 2030 and (2) attaining carbon neutrality by 2050. Furthermore, in 2021, North Carolina enacted House Bill 951, which emphasizes its commitment to reduce carbon dioxide emissions in the electric power sector based on key goals presented in the CEP.

The NC WAP will distribute \$89,776,045 of BIL funds for the purpose of enhancing energy efficiency in the homes of low-income families, particularly those in disadvantaged communities



(DACs), throughout all 100 counties of North Carolina. The NC WAP energy upgrades provide homeowners relief through energy savings and home improvements that support equitable health and safety for North Carolinians. The NC WAP anticipates that the ~\$89.7M BIL stimulus will aid over 6,000 households across the state. **\$69.783M has been reserved for direct weatherization services (Table 1).**

It is important to note that NC WAP 5 Yr. BIL funds will follow the DOE March 2022 [Administrative and Legal Requirement Document \(ALRD\)](#) PERIOD OF PERFORMANCE guidance. The \$69.783M will not be released as one lump sum. Releasing the funds are based on evaluation of project performance, project schedule adherence, the extent milestone objectives are met, compliance with reporting requirements and overall contribution to the program goals and objectives.

As a result of this evaluation, DOE may, at its discretion, authorize the following actions: (1) continue to fund the project, contingent upon the availability of funds appropriated by Congress for the purpose of this program and the availability of future-year budget authority; (2) place a hold on federal funding for the project, pending further supporting data or funding; or (3) discontinue funding the project because of insufficient progress, change in strategic direction, or lack of funding.

Table 1. Total 5-year Funding Distribution for Direct Weatherization Services by NC 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	\$1030,858	\$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

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).



weatherization.

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

VII. Key Weatherization Focus Areas

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

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

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

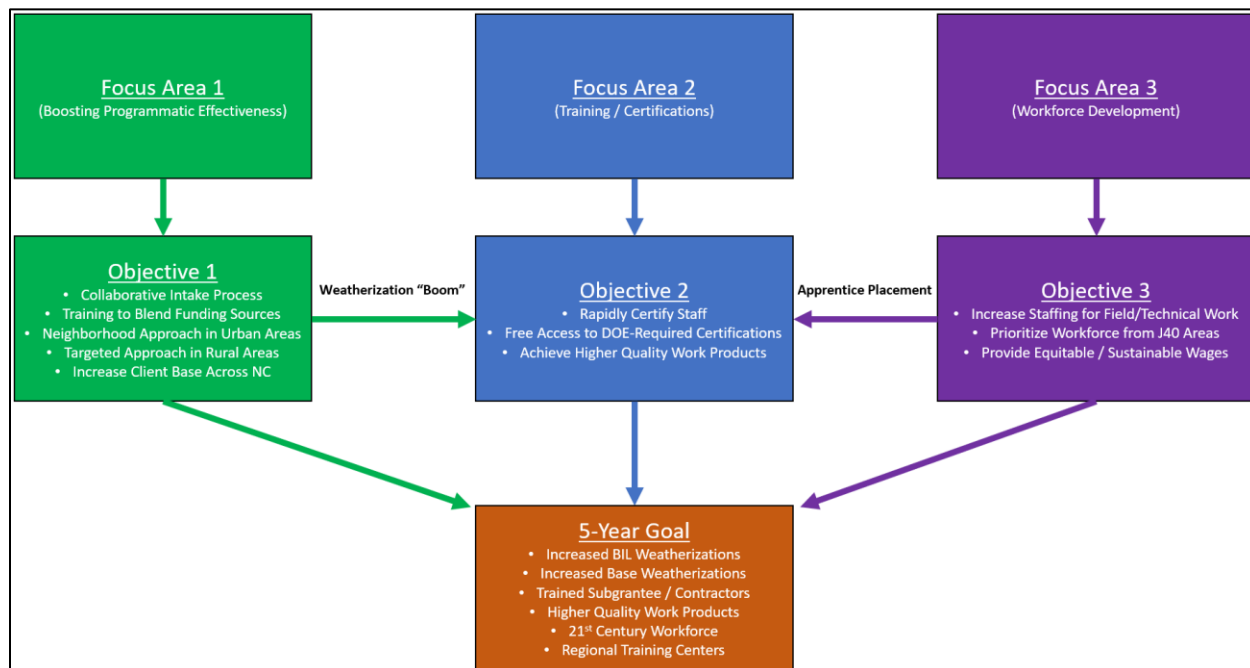


Figure 2. North Carolina’s training and technical assistance approach for the BIL program.

VIII. Proposal Guidelines and Requirements

To make certain proposed projects meet the criteria above, eligible applicants will be expected to provide, at minimum, the following information concerning the anticipated single family weatherization services:

- Agency name(s), address(es), and technical lead(s).
- A description of the agency's experience and preparedness to implement weatherization services across the state of North Carolina.
- A description of recruitment strategies that will be utilized to identify single family units to weatherize throughout the state. How are units within disadvantaged communities and households with elderly, disabled, young children, high energy burden, and high energy users recruited? A specific plan should be developed for methods to reduce weatherization deferrals in the state. *Note: approximately 50% of income-eligible clients in North Carolina are deferred due to items such as general health/safety concerns, disrepair of mechanical or electrical systems, structural deficiencies, and severe mold/moisture problems.*
- A description of how your agency retains and advances a modern workforce in weatherization. Include how your agency will build upon these efforts.
- A list of weatherization contractors or related agency partners. Please describe how you and partners will implement both (1) energy efficient and (2) clean energy upgrades that assist in a more resilient energy grid.
- A list of metrics that will be collected for persons in single family units to be weatherized, including methods for keeping private and personal information safe.
- Regular reporting on objectives metrics, project progress, and any project setbacks (*with root cause analysis*) encountered.
- A detailed workforce development plan describing how this project will support equitable job opportunities, an increase in the diversity of hired employees, training within the energy sector, and a commitment to jobs with living wages and benefits that aligns with the Justice40 initiative. *(Please note that participating in the apprentice program and placing apprentices within their organization will likely be a requirement under BIL funding.)*
- Identify at least one or more Go/No-Go milestones in the project. A Go/No-Go milestone is a major milestone in the project that if not completed on time may result in a cancellation of the subaward. Progress towards meeting the Go/No-Go milestones must be reported in the quarterly progress reports submitted to NC DEQ and DOE. At these Go/No-Go milestones, NC DEQ will evaluate project performance, schedule adherence, and contribution to the NC WAP goals and objectives.
- A detailed budget, including a line item for the number of single-family dwellings.
- Resumes of those who will manage the single-family unit weatherization program, including those who will lead relevant training sessions.
- Certificates of Insurance that document relevant coverage for weatherization services, the limits of liability and coverage dates of service provider(s) policies. All documents and coverage must be current.



IX. Unit Eligibility

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

X. Energy Audit Tool and Workforce Resources

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

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

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

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

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

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

XI. Justice40 Initiative Guidelines

[Justice40](#) is a whole-of-government effort to ensure that Federal agencies work with states and local communities to deliver at least 40 percent of the overall benefits from Federal investments



in climate and clean energy to DACs. For additional information, see Weatherization Program Notice BIL 22-1 11 Executive Order 14008, Federal Register: Tackling the Climate Crisis at Home, and the Office of Management and Budget (*OMB*) Memorandum 21-28.

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

XII. Declaration of Confidential Information

If a proposer deems that certain information required by this RFP is confidential, the proposer must label such information as CONFIDENTIAL prior to submission. The proposer must reference where the information labeled CONFIDENTIAL is located in the proposal. For each subsection so referenced, the proposer must provide a convincing explanation and rationale sufficient to justify an exemption of the information from release under the Freedom of Information Act. The explanation and rationale must be stated in terms of (1) the prospective harm to the competitive position of the proposer that would result if the identified information were to be released and (2) the reasons why the information is legally exempt.

XIII. Questions about the RFP

Eligible Service Provider(s) shall carefully review this RFP. Questions must be directed to Matthew Davis via the [question portal](#) on or before 5:00 p.m. Eastern Standard Time, Wednesday, August 2, 2023.

NC DEQ will not respond to verbal questions. All questions received by 5:00 p.m. Eastern Standard Time, Wednesday, August 2, 2023, will be answered in writing; NC DEQ's written response will be posted to the DEQ WAP webpage (<https://www.deq.nc.gov/energy-climate/state-energy-office/weatherization-assistance-program>) by 5:00 p.m. Friday, August 18, 2023.

XIV. Submission Details

RFPs should be formatted to have 1-inch margins with 12 pt font. The agency name(s) and page number should appear on each page. NC WAP recommends that proposals do not exceed 15 pages. Any example training material may be provided as appendices.

All proposals shall be received by 5:00 PM Eastern Standard Time, on Friday, September 15, 2023. Proposals may be [submitted through this application portal](#). Proposals shall be submitted in PDF format.

XV. Evaluation of Proposals

NC DEQ's WAP will evaluate submitted proposals using the criteria listed in the table below. Numerical scores will be provided to each proposal. Applicants will be notified of committee decisions on Friday, December 15, 2023, at 5:00 p.m. Eastern Standard Time. NC DEQ will choose a favored contractor to begin contract negotiations, and may, failing to reach satisfactory terms, choose another service provider. Further, NC DEQ reserves the right to choose any contractor – regardless of score.



Evaluation Criteria	Points
Weatherization Experience & Preparedness	10
Recruitment Strategies to ID Single Family Units to be weatherized and Plan to Reduce Deferrals	20
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 (*CFR*) [10 CFR § 440.15](#), preference is given to any CAA or other public or nonprofit entity which has, or is currently administering, an effective program under this part or under title II of the Economic Opportunity Act of 1964, with program effectiveness evaluated by consideration of factors including, but not necessarily limited to, the following:

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

XVI. Announcement of Award Recipients

Applicants will be notified of their proposal funding status by e-mail on Friday, December 15, 2023, by 5:00 p.m. Eastern Standard Time.

XVII. Build America, Buy America

The Build America, Buy America (*BABA*) provisions of the Bipartisan Infrastructure Law (*BIL*) establish a domestic content procurement preference for all federal financial assistance obligated for infrastructure projects after May 14, 2022. [Per Weatherization Assistance Program Memorandum 104](#), “*Only weatherization on public housing or privately owned buildings that serve a public function are required to comply with the BABA requirements*”

[BABA requires](#) the following:

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



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

XVIII. Reporting Requirements for Accepted Projects

Contingent on use of BIL funding, any selected entities will be mandated to follow the most up-to-date DOE and NC WAP program and reporting requirements. All grant awards made under this Program shall comply with applicable law and regulations including, but not limited to, the NC WAP regulations contained in 10 CFR 440, the Uniform Guidance at 2 CFR Part 200 as adopted by DOE at 2 CFR Part 910, and the Bipartisan Infrastructure Law (*Infrastructure Investment and Jobs Act*), Public Law 117-58. This will include, but may not be limited to:

- The reporting and audit requirements of 2 CFR Part 200, including submission of an annual audit of weatherization funds conducted in accordance with 2 CFR Part 200, Subpart D & F.
- Travel regulations that include travel authorization, reimbursement, advancements, and per diem rates that do not exceed the State of North Carolina’s maximum amount.
- Funding requirements. Funds shall not be expended for the items or services other than those listed in 10 CFR 440.18. T&TA funds cannot be used to purchase equipment used in the day-to-day installation of weatherization measures. Where a need exists to purchase tools and equipment Subgrantees should use “*Program Operations*” funds.
- Subgrantees shall comply with the Environmental Protection Agency (*EPA*) regulations as set forth in 40 CFR Part 247 - Guidelines for Procurement of Recovered Materials, which encourages the use of recyclable materials. Subgrantees shall use recyclable materials whenever possible. Compliance with EPA regulations also applies to the decommissioning of replaced baseload appliances whether subcontracted out or not.
- Adjusted Average Cost Per Dwelling Unit (*ACPU*): *ACPU* expenditure of financial assistance provided under WAP for labor, weatherization materials, and related matters cannot exceed \$6,500, as adjusted (*see, 10 CFR §440.18(a) and (c)*). The adjusted average for BIL grants is determined by using the percentage increase in the Consumer Price Index (*CPI*) (*all items, United States city average*) for FY 2021 or 3 percent, whichever is less. The percentage increase in the *CPI* for the previous 12-month period (*September 2020 – September 2021*) was 5.4%. Therefore, the adjusted average expenditure limit for at the time of the BIL grants is \$8,009. This average includes units computed in a multifamily building of 5 units or greater.

Each Subgrantee shall submit certified and timely reports to NC DEQ detailing the progress made towards the program objective(s) and all administrative and program expenditures. The report must agree with the Subgrantee’s accounting records, client database, and be certified by the Subgrantee’s Chief Executive Officer or their designee via handwritten or certified electronic signature.

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



- b. Invoice *[NC WAP Template]*
 - Signature, Date, and Title of two separate Management Staff.
 - c. Financial Status Report “286” *[NC WAP Template]*
 - PDF (*signed, dated, and title of certifying official*) and Excel (*unsigned*) versions of the FSR 286, respectively
 - The Preparer and Program Coordinator should be a different person than the Certifying Official.
 - d. Project Expense Summary *[NC WAP Template]*
 - Date of Purchase
 - Vendor Invoice Number
 - Vendor Name
 - Subgrantee Project ID
 - Invoiced Amount by Budgeted Line-Item Category (*to include a statement of whether sales tax was charged for all expenses*).
 - 1. Official receipts and supporting documentation to match the exact amount billed (*i.e., for educational materials, subcontractor costs, general ledgers, payroll reports, etc.*),
 - 2. Subgrantee writes “*Subgrantee Project ID*” on receipts and how much was charged to DOE funds.
 - e. Building Materials Amount
 - f. Checkbox for whether purchases align with NC WAP’s “*Build America, Buy America*” guidance.
 - g. Training Amount
 - h. Project Total for Billing Cycle
 - i. Signature, Date, and Title of Financial Director.
- II. Reporting Format – NC DEQ has provided all Subgrantees with online access to software for the purpose of reporting weatherization activities. All weatherization Subgrantees are required to use program software for reporting purposes.
- III. NC WAP cannot approve an incomplete billing package. Expenses will not be reimbursed without providing all items listed above on a monthly basis (*regardless of whether expenses were made*).



XIX. Evaluation Process and Scoring – Single Family

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

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

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

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

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



Table 1-1: Criteria Scoring Options

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

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



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

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

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

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

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

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

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

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

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

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



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

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

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

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

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

Additional considerations for completing the application.

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

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

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



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

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

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

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

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

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

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



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

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

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

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

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

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

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

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



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

Agency name: Piedmont Triad Regional Council
Address: 1398 Carrollton Crossing Drive, Kernersville, NC 27284

Technical Leads:

- Michael Blair, Community Development Director
 - Michael Blair has worked with federal and state grants since 2001. His experience with Weatherization started in 2017 when the program was merged with the Housing Department which included HOME Rehabilitation, NCHFA funding, and other grants like State Scattered Site CDBG. From that moment on he has worked to get the similar but very different programs running concurrently in over 16 counties in central North Carolina.
- Andrew Corbett, Community Development Supervisor,
 - Drew Corbett has been working in the Weatherization field since 2009. He began as an entry level crew member, quickly working his way to crew leader and crew supervisor. From there he worked his way to Initial Auditor and Quality Control Inspector. He currently is the supervisor for Weatherization and Rehabilitation at Piedmont Triad Regional Council in Kernersville, NC. Drew brings with him a wealth of knowledge about general construction, energy efficiency program specifications and guidelines, and nationally recognized certifications.
- Nikia Beal, Community Development Administrative Coordinator
 - Nikia Beal has been a part of North Carolina Weatherization for eight years. In that relatively short amount of time, her organizational skills and attention to detail have set her apart. She not only keeps the day-to-day operations on track, but also has an impressive working knowledge of every facet of program whether it be administrative or technical. From regularly addressing client questions and concerns to coordinating field staff and contractor scheduling in the field, her high capacity for multi-tasking benefits everyone involved. Along with those duties, she has also been a founding member of the Piedmont Triad Regional Council Training Center staff and handles all of its administrative operations.

A description of the agency’s experience and preparedness to implement weatherization services across the state of North Carolina.

Piedmont Triad Regional Council (PTRC) is an established council of governments with an impressive track record spanning 55 years in grant management. PTRC has been a part of the North Carolina Weatherization network for 12 years. We bring a wealth of experience and

capability to the table, positioning us as a highly proficient agency prepared to implement weatherization services wherever requested throughout North Carolina.

We provide Weatherization in 8 counties, and Single-Family Rehabilitation Program in 14 counties through the NCFHA. We have the ability to braid the funding with these two core programs as well as funding provided by Duke Energy, Carolinas, Duke Energy Progress, Blue Cross Blue Shield, Dominion Energy, Green & Healthy Homes Initiative, and Healthy Homes Community Block Grant.

PTRC is continually called upon to provide training on braiding funds throughout the state. We seek other opportunities to progress in this process – as they become available as with the ARPA funding.

Our commitment to delivering effective weatherization services is evident through our 12-year history of active participation in the North Carolina Weatherization network. This extensive experience has granted us valuable insights into the intricacies of the weatherization landscape in the state.

One of PTRC's strengths lies in its ability to braid funding from diverse sources seamlessly. This proficiency ensures that we can maximize the impact of available resources and tailor our weatherization initiatives to the specific needs of North Carolina's communities. PTRC's financial acumen allows us to strategically allocate funds, making the most out of every dollar invested in weatherization.

As an agency, PTRC is dedicated to delivering equitable and impactful weatherization services that benefit all communities across North Carolina. Our extensive grant management experience, combined with our history within the state's weatherization network, positions us to continue making significant strides in improving energy efficiency, reducing energy burdens, and enhancing the overall well-being of residents throughout North Carolina. We are fully prepared and committed to advancing these objectives on a statewide scale.

A description of recruitment strategies that will be utilized to identify single family units to weatherize throughout the state. How are units within disadvantaged communities and households with elderly, disabled, young children, high energy burden, and high energy users recruited? A specific plan should be developed for methods to reduce weatherization deferrals in the state. Note: approximately 50% of income-eligible clients in North Carolina are deferred due to items such as general health/safety concerns, disrepair of mechanical or electrical systems, structural deficiencies, and severe mold/moisture problems.

1. Introduction

PTRC recognizes the critical importance of robust recruitment strategies for the successful implementation of the Weatherization Program across North Carolina. Our approach will be multi-faceted and inclusive to ensure all eligible households, particularly those within disadvantaged communities and households with specific vulnerabilities, are reached.

2. Recruitment Strategies

Recruiting single-family units for weatherization in North Carolina requires a comprehensive strategy that addresses both the general population and those residing in disadvantaged communities and households with specific vulnerabilities. We recognize the need to develop a specific plan to reduce weatherization deferrals, as a significant number of eligible clients in North Carolina face barriers to participation. Our recruitment strategies include:

- **Community Collaborations:** We will establish partnerships with community organizations, local governments (we already have relationships with most of the regions county governments), and non-profits (we work with agencies like Greensboro Housing Coalition, Habitats in every county, Greensboro Housing Solutions, Age Friendly Forsyth, NC BAM etcetera). Community liaisons will actively engage with residents in target areas, promoting awareness of the Weatherization Program's benefits and eligibility criteria. These liaisons will serve as trusted points of contact, making it easier for residents to inquire and participate. We have satellite offices (Weatherization and Section 8) in every county in our region.
- **Targeted Outreach Campaigns:** Recognizing the cultural diversity within North Carolina, we will design customized marketing campaigns tailored to the specific region we serve. These campaigns will employ culturally relevant messaging and materials to ensure that all communities feel informed and included. Outreach efforts will utilize traditional media, social media platforms, and participation in local community events (festivals, community events and power up meetings along with other targeted community functions) to connect with potential participants. We have appeared on local TV interest programs and urban radio stations recently.
- **Health and Social Services Integration:** To identify and assist households with specific vulnerabilities, including the elderly, disabled individuals, young children, and those experiencing a high energy burden, we will collaborate closely with health and social service agencies. Through these partnerships, we will receive referrals of eligible households, ensuring that individuals with health and safety concerns are connected to appropriate services and resources. For instance, we have offices in Davie County Health and Human Services, Yadkin County DSS, Surry County Government DSS and Criminal Justice, and others.
- **Support Services:** Recognizing that many deferrals stem from issues related to health, safety, structural deficiencies, or energy burden, we will provide support services. These may include assistance in addressing immediate health and safety concerns, facilitating structural repairs, or implementing energy-saving measures. Our goal is to remove as many barriers to participation as possible.

Reducing Weatherization Deferrals:

PTRC braids funding with NCHFA Single-Family Rehabilitation, Duke Energy and Blue Cross Blue Shield programs to address deferral reasons. In addition, PTRC continually seeks other funding opportunities to advance the goals and objections of all programs. For example, PTRC obtained over \$650,000 of ARPA funding to address Weatherization Program deferral issues in the summer of 2022 resulting in over 65 units being brought out of deferral status.

PTRC leverages our relationships with our four entitlement cities to coordinate their CDBG, HOME and bond funded programs with our Weatherization and projected BIL projects to eliminate deferrals. To address the high rate of deferrals throughout the region, we will implement a specific plan that includes:

- **Holistic/Comprehensive Assessments:** Comprehensive assessments will be conducted for each eligible household. These assessments will go beyond traditional weatherization measures to include health and safety evaluations, structural repairs, and a thorough examination of energy efficiency needs. By addressing multiple issues in one visit, we aim to minimize deferrals due to incomplete work.
- **Dedicated Case Management:** For households facing deferrals, we will assign dedicated case managers. These professionals will work closely with participants to coordinate repairs, connect them with relevant services (like CDBG and HOME from other organizations), and facilitate the completion of weatherization activities. Case managers will act as advocates to ensure that participants receive the support, they need to overcome deferral barriers.

By implementing these recruitment and deferral reduction strategies, we aim to maximize the impact of the Weatherization Program in North Carolina and ensure that eligible households, especially those in disadvantaged communities or facing specific vulnerabilities, can access the benefits of weatherization services.

A description of how your agency retains and advances a modern workforce in weatherization. Include how your agency will build upon these efforts.

We offer regular training programs to keep our staff updated with the latest weatherization techniques, technologies, and regulations. This includes workshops, online courses, and certifications such as Energy Auditor, QC Inspector, Infiltration and Duct Leakage, Training Center Proctors, duct blaster, metric of moisture, PHRANC or any other courses that will help build them into better, more energy efficient, auditors. We encourage employees to enhance their skills and provide opportunities for professional growth.

The PTRC promotes a healthy work-life balance by implementing flexible work arrangements, such as remote work options or flexible scheduling, where feasible. Recognizing the importance of employee well-being and offer support programs, such as mental health resources, employee assistance programs, or wellness initiatives. We offer competitive salaries and benefits packages to attract and retain skilled workers.

We regularly review and adjust compensation to align with industry standards through our merit-based compensation system. PTRC has a supportive and inclusive workplace culture where employees feel valued, respected, and empowered. Encourage collaboration, open communication, and feedback. Our organization recognizes and rewards achievements to boost morale and foster a sense of belonging.

The PTRC Weatherization Training Center is committed to not only training the next generation of weatherization professionals but also to retaining and advancing a modern workforce within the weatherization sector. Our approach involves building on existing efforts and implementing innovative strategies to create a skilled, adaptable, and diverse workforce.

Building on Current Efforts:

- **Comprehensive Training Programs:** We currently offer comprehensive training programs for weatherization professionals, encompassing energy efficiency, building science, and the latest industry standards. These programs provide a strong foundation for individuals entering the field.
- **Certifications and Credentials:** Our training center emphasizes the importance of industry-recognized certifications and credentials. We encourage our workforce to pursue certifications such as Building Performance Institute (BPI) certifications, which are highly regarded in the weatherization industry.
- **Continuing Education:** Weatherization is a rapidly evolving field, with new technologies and techniques emerging regularly. We provide opportunities for ongoing education and skill development to ensure our workforce remains up-to-date with the latest industry advancements.
- **Advanced Training Modules:** To cater to the evolving needs of the weatherization sector, we will introduce advanced training modules that focus on emerging technologies, such as smart home integration, renewable energy systems, and sustainable building practices. These modules will equip our workforce with the knowledge and skills needed to address modern energy challenges.
- **Leadership Development:** We recognize the importance of cultivating leaders within the weatherization workforce. Our center will offer leadership development programs that empower individuals to take on supervisory roles, project management, and mentoring responsibilities. This not only retains talent but also advances the sector as a whole.
- **Diversity and Inclusion Initiatives:** Building a modern workforce means embracing diversity and inclusion. We will actively recruit individuals from underrepresented communities and provide support and mentorship programs to help them succeed in the weatherization field. By fostering diversity, we bring fresh perspectives and ideas to the sector.
- **Digital Learning Platforms:** We will invest in digital learning platforms that enable weatherization professionals to access training materials and resources remotely. This flexibility allows individuals to balance work, training, and personal commitments more effectively, making it easier to upskill and advance their careers.
- **Collaboration with Industry Partners:** We will strengthen our partnerships with industry stakeholders, including weatherization agencies, contractors, and manufacturers. Collaborative initiatives, such as joint research projects or knowledge sharing, will ensure that our workforce remains aligned with industry needs.
- **Mentorship Programs:** Our center will establish mentorship programs that connect experienced professionals with newcomers to the field. This mentorship not only

enhances the skills of new hires but also fosters a sense of community and camaraderie within the weatherization workforce.

By building on our current efforts and implementing these innovative strategies, the PTRC Weatherization Training Center aims to retain and advance a modern and adaptable workforce in the weatherization sector. We are dedicated to preparing our workforce to meet the challenges of today and tomorrow while fostering diversity and inclusivity within our industry.

PTRC Weatherization Career Advancement Plan

Introduction: A well-structured career advancement plan is essential to empower weatherization employees and staff, enabling them to maximize their potential and contribute to our organizations long-term success. This plan outlines a roadmap for personal and professional development, encompassing short-term and long-term goals.

Short-Term Goals (1-2 years):

- **Technical Proficiency:** Enhance technical skills and knowledge related to weatherization techniques, energy efficiency, and safety protocols. Attend training sessions, workshops, and certification programs.
- **Effective Communication:** Develop strong communication skills to interact effectively with clients, team members, and partners. Attend communication workshops and engage in peer-to-peer mentoring.
- **Project Efficiency:** Improve efficiency in weatherization projects by setting performance metrics and targets. Implement best practices for streamlining project workflows.
- **Safety Protocols:** Ensure strict adherence to safety protocols. Monitor and maintain a safe working environment for the team and clients.
- **Client Engagement:** Enhance client engagement by providing clear explanations of weatherization benefits and options. Improve customer satisfaction through surveys and feedback mechanisms.

Mid-Term Goals (3-5 years):

- **Leadership Skills:** Develop leadership qualities by taking on supervisory or team lead roles. Lead weatherization teams and oversee project management.
- **Program Management:** Gain expertise in program management, including budgeting, resource allocation, and strategic planning. Contribute to program growth and expansion.
- **Certifications:** Acquire advanced certifications related to energy efficiency and weatherization. Become a recognized expert in the field.
- **Staff Development:** Mentor and train junior staff members. Create a culture of continuous learning within the team.
- **Community Engagement:** Establish strong community ties by participating in outreach programs, workshops, and events. Advocate for energy efficiency and environmental sustainability.

Long-Term Goals (5+ years):

- **Strategic Leadership:** Assume a leadership position within the weatherization program or organization. Drive strategic initiatives and shape the future direction of the program.

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- **Innovation:** Pioneer new approaches and technologies in weatherization, contributing to industry advancements. Explore renewable energy integration and sustainable practices.
- **Policy Advocacy:** Engage in policy advocacy at local, state, or national levels to influence legislation related to weatherization and energy efficiency.
- **Education and Training:** Establish training programs or educational initiatives to nurture the next generation of weatherization professionals.
- **Sustainability:** Promote sustainability and environmental stewardship as a core value in all aspects of weatherization work.

Support and Resources:

- **Mentorship:** Pair employees with experienced mentors (inside and outside of our organization) to guide their career development.
- **Professional Development Budget:** Allocate a budget for employees to attend conferences, workshops, and courses.
- **Performance Reviews:** Conduct regular annual performance reviews to track progress and adjust individual career development plans accordingly.
- **Networking Opportunities:** Encourage participation in industry associations and networks to foster connections and knowledge exchange.
- **Feedback Loop:** Maintain an open feedback loop for employees to express concerns, share ideas, and suggest improvements.

By implementing this Weatherization Career Advancement Plan, employees and staff will have a clear path for personal and professional growth, which will, in turn, maximize the program's impact on energy efficiency and sustainability. Regular assessment and adjustments to the plan will ensure its continued relevance and effectiveness.

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.

List of PTRC Weatherization Contractors and Related Agency Partners:

- **Climate Control:** Climate Control (CCI) is a trusted partner with a strong track record in energy-efficient upgrades. Together, we will implement energy-efficient measures such as improved insulation, air sealing and health and safety measures. These enhancements reduce energy consumption and lower utility bills for homeowners.
- **Energy Reduction Specialist:** Energy Reduction Specialist (ERS) specializes in energy efficient upgrades. Their years of experience in this field makes them a perfect partner and fit for this grant. They specialize in insulation, air sealing, vapor barriers and energy reducing measures.
- **G & S Quality Insulation:** G & S Quality Insulation Has become a great asset for our agency. They specialize in Insulation, Air sealing Health and safety and mold remediation. They have multiple crews and can handle a more robust work load.

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- **All Systems Restored:** All Systems Restored is an HVAC Electrical and plumbing company with multiple years of experience. Their expertise in all of these fields makes them a reliable and trusted partner.
- **Gardner Heating & Air:** Gardner Heating & Air Is an HVAC and Electrical contractor with multiple years in weatherization. Their familiarity with weatherization makes them a unique fit for our program.
- **VSI Heating & Cooling:** VSI Heating & Cooling Is an HVAC company with over twenty years of experience specializing in heating and air upgrades. Their quick turnaround on ECT's and install make them a great fit for our program.
- **Foster Electric:** Foster Electric is an electrical company. They are able to come in and work closely with other contractors and do specialty work when needed.
- **Healthy Homes Contractors:** Health Homes Contractors specializes in vapor barriers and air sealing with experience in specialty work such as doors, joist, and other specialty work.

Partners and Related agencies:

- Duke Energy Carolina
- Duke Energy Progress
- Piedmont Electric
- Randolph Electric
- Blue Cross Blue Shield
- Dominion Energy
- City of High Point Electric
- Energy United
- Yadkin-Surry Electric
- YVEDDI (Surry Stokes Yadkin Davie and Rowan)
- I-Care, Inc. (Iredell)

Implementation of Energy Efficient and Clean Energy Upgrades:

- **Improved Insulation:** Upgrading insulation in walls, attics, and basements to reduce heat loss and improve energy efficiency.
- **Air Sealing:** Identifying and sealing air leaks to prevent energy wastage.
- **High-Efficiency HVAC Systems:** Installing high-efficiency heating and cooling systems that consume less energy.
- **Energy-Efficient Appliances:** Replacing outdated appliances with Energy Star-rated models to reduce electricity consumption where grants allowed.
- **Clean Energy Upgrades:** To promote a more resilient energy grid, we will implement clean energy solutions such as:
- **Incidental measures:** These measures will be installed to protect energy efficient measures to ensure longevity of the measures.
- **Community Education:** We will engage in community education efforts to raise awareness about the benefits of energy-efficient and clean energy upgrades. Homeowners will be informed about the role their upgraded homes play in contributing to a more resilient energy grid.

By partnering with these contractors and related agencies and implementing a combination of energy-efficient and clean energy upgrades, we aim to create more energy-resilient homes and contribute to a sustainable and reliable energy grid in North Carolina.

A list of metrics that will be collected for persons in single family units to be weatherized, including methods for keeping private and personal information safe.

Demographics:

- The age of the individuals residing in the unit.
- The number of people living in the unit.
- The household income level
- The highest level of education attained by the residents.
- If the clients are employed, unemployed, or retired.

Housing Metrics:

- If the home is owned or rented.
- Single-family home, condo, townhome, mobile home.
- Energy Bills

Energy Usage Reduction: Measure the reduction in energy consumption after weatherization, quantifying the decrease in utility bills for residents.

Health and Safety Improvements: Assess the impact of weatherization on indoor air quality, identifying reductions in allergens, pollutants, and mold/moisture issues.

Energy Efficiency: Calculate the increase in energy efficiency through improved insulation, air sealing, and HVAC system upgrades.

Clean Energy Integration: Track the installation and utilization of clean energy systems, such as solar panels and energy storage solutions.

Carbon Footprint Reduction: Measure the reduction in greenhouse gas emissions resulting from clean energy upgrades and reduced energy consumption.

Energy Grid Resilience: Assess the contribution of weatherized homes to grid resilience, including their ability to supply excess energy during emergencies.

Cost Savings: Calculate the cost savings for homeowners due to reduced energy bills and maintenance costs.

Home Comfort: Gauge improvements in overall home comfort, including temperature stability and indoor air quality.

Weatherization Deferral Reduction: Monitor the success of strategies aimed at reducing weatherization deferrals, particularly in households with health/safety concerns, structural deficiencies, and energy burden issues.

Methods for Ensuring Data Privacy:

- **Anonymization:** Personal and sensitive information will be anonymized, ensuring that individual identities are not disclosed in reports or data analysis.
- **Data Encryption:** All data collected will be encrypted during transmission and stored to protect against unauthorized access.
- **Secure Storage:** Data will be stored on secure servers with restricted access, and regular security audits will be conducted.
- **Informed Consent:** Homeowners will provide informed consent for data collection, with emphasis on the understanding of how their information will be used and protected.

- **Compliance with Regulations:** PTRC will comply with all relevant data privacy regulations, including GDPR and HIPAA where applicable.
- **Data Use Agreement:** PTRC will establish data usage agreements with partnering organizations, outlining the purposes and limitations of data usage.
- **Regular Auditing:** Periodic audits of data security practices will be conducted to identify and address vulnerabilities.
- **Employee Training:** Staff involved in data collection and analysis will receive training on data privacy protocols and best practices.

By collecting these metrics and ensuring robust data privacy measures, PTRC will effectively evaluate the impact of its weatherization program while safeguarding the personal and private information of program participants.

Regular reporting on objectives metrics, project progress, and any project setbacks (with root cause analysis) encountered.

PTRC will collect all relevant information and data related to the BIL project progress. This will include project timelines, milestones, budget allocations and expenditures, performance metrics, outcomes achieved, challenges faced, and any other pertinent details. PTRC will evaluate how the project has progressed in relation to these objectives and identify any areas where adjustments or modifications may be necessary.

PTRC will create comprehensive progress reports that provide a clear overview of the project's current status. The report will highlight key achievements, challenges, and next steps. It will include quantitative data, such as performance metrics, as well as qualitative information, such as narratives, to provide a holistic view of the project's progression.

This is PTRC's draft quarterly progress report for the BIL funding:

- a. Provide a brief overview of the project's quarterly status; including key milestones achieved, deliverables completed, and any changes or updates to the project plan.
- c. The report will include relevant data and metrics. This will include quantitative indicators such as unit completion data, client demographics and cost analysis.
- d. We will discuss any obstacles or difficulties encountered during the project implementation and outline strategies employed to address them. Demonstrating our ability to adapt and find solutions to challenges.
- e. Summary of the overall progress of the project.

PTRC will follow the NCDEQ's guidelines for submitting project progress reports. PTRC strives to maintain transparency and accuracy in reporting for all programs.

PTRC is committed to providing transparent and detailed reporting on the objectives, metrics, project progress, and any encountered setbacks throughout the Weatherization Program. Regular reporting serves as a critical tool for project management, oversight, and continuous improvement. Here is an outline of our reporting process:

- **Quarterly Progress Reports:** PTRC will submit comprehensive quarterly progress reports to the funding agencies, including the NC Department of Environmental Quality (NC

DEQ) and the Department of Energy (DOE). These reports will highlight key metrics, program achievements, and any challenges faced.

- **Objective Metrics:** The progress reports will include a detailed analysis of objective metrics, showcasing the program's impact on energy reduction, health and safety improvements, energy efficiency, clean energy integration, carbon footprint reduction, cost savings, and more. Metrics will be compared to baseline data to demonstrate program effectiveness.
- **Project Milestones:** Each progress report will outline the achieved project milestones during the reporting period. This includes the number of single-family units weatherized, clean energy installations, and successful reductions in energy consumption.
- **Root Cause Analysis:** In the event of any project setbacks, PTRC will conduct thorough root cause analyses to identify the underlying causes of issues. This analysis will help develop strategies for mitigation and improvement.
- **Mitigation Plans:** Progress reports will also include mitigation plans for addressing setbacks or challenges. These plans will outline the actions taken or planned to overcome obstacles and ensure program success.
- **Budget Utilization:** The reports will provide a transparent overview of budget utilization, detailing expenditures and any adjustments made to stay within budget constraints.
- **Community Impact:** PTRC recognizes the importance of highlighting the positive impact of the program on the communities it serves. Progress reports will include case studies, testimonials, and stories of how weatherization has improved residents' lives.
- **Data Privacy Compliance:** Reports will confirm PTRC's compliance with data privacy regulations and the measures taken to safeguard the privacy of program participants.
- **Future Goals:** Each progress report will set forth future goals, outlining PTRC's strategy for the upcoming reporting period and any adjustments to program implementation.
- **Stakeholder Engagement:** PTRC values stakeholder input and engagement. Progress reports will include information on stakeholder meetings, feedback received, and actions taken in response to stakeholder input.

These regular progress reports will provide funding agencies and stakeholders with a comprehensive understanding of the Weatherization Program's performance, challenges, and successes. PTRC is committed to using this information to continuously improve the program and achieve its goals effectively.

A detailed workforce development plan describing how this project will support equitable job opportunities, an increase in the diversity of hired employees, training within the energy sector, and a commitment to jobs with living wages and benefits that aligns with the Justice40 initiative.

Equitable Job Opportunities: PTRC is committed to providing equitable job opportunities to individuals across North Carolina. To achieve this, we will implement several strategies:

Piedmont Triad Regional Council RFP Response – Weatherization of Single-Family Units

- **Targeted Recruitment:** We will actively recruit from disadvantaged communities, partnering with local organizations and workforce development agencies to ensure opportunities are accessible to all.
- **Diversity in Hiring:** We will promote diversity in our hiring practices, seeking candidates from various backgrounds, including underrepresented groups.
- **Training and Certifications:** PTRC will offer training and certifications that enable candidates from different skill levels to participate. We will work with local training providers and our own training center to create accessible training pathways.
- **Community Outreach:** Our outreach efforts will include informational sessions, job fairs, and presentations at local community centers to engage potential employees.

Training within the Energy Sector

Energy Sector Training: PTRC recognizes the importance of providing relevant training within the energy sector. Our workforce development plan includes:

- **Weatherization Training Center:** PTRC has established a Weatherization Training Center that is expanding to offer state-of-the-art training facilities and resources. This center will provide comprehensive training on weatherization techniques, energy efficiency measures, and clean energy integration.
- **Clean Energy Training:** We will collaborate with clean energy organizations and institutions to develop training modules that prepare employees for careers in renewable energy, grid resilience, and clean energy technology.
- **Energy Auditing Certification:** PTRC will support employees in obtaining energy auditing certifications, which are valuable credentials in the energy sector.

Jobs with Living Wages and Benefits

Living Wages: PTRC is committed to offering jobs with living wages that provide employees with economic security. Our approach includes:

- **Wage Standardization:** We will work with local partners to establish wage standards that ensure fair compensation for all employees.
- **Benefits Packages:** PTRC will offer competitive benefits packages that include healthcare, retirement plans, and paid time off. It should be noted that the PTRC participates in NCLGERS.
- **Career Advancement:** We will provide pathways for career advancement within the weatherization field, allowing employees to increase their earning potential.

Alignment with Justice40 Initiative

Justice40 Commitment: PTRC is fully aligned with the Justice40 initiative's goals of delivering 40% of the overall benefits of federal investments in climate and clean energy to disadvantaged communities. To ensure alignment, we will:

- **Community Focus:** Our recruitment efforts will prioritize disadvantaged communities, ensuring they benefit from job opportunities and the energy efficiency improvements our program brings.

- **Data Tracking:** We will track and report on the demographics of our workforce to ensure that we are meeting Justice40 objectives.
- **Community Partnerships:** PTRC will collaborate with community organizations and stakeholders to ensure the Justice40 initiative's principles are woven into our workforce development and weatherization efforts.

Participating in the Apprenticeship Program

PTRC is committed to participating in the apprenticeship program and placing apprentices within our organization, in alignment with BIL funding requirements. We will create apprenticeship opportunities, provide mentorship, and offer on-the-job training to support the development of the next generation of weatherization professionals.

Our Weatherization Workforce Development Plan reflects our dedication to creating equitable, diverse, and well-compensated job opportunities within the energy sector while adhering to the principles of the Justice40 initiative. We look forward to contributing positively to North Carolina's communities and workforce.

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.

Year 1:

1. Program Kickoff and Recruitment Strategy Implementation (12 Months)

- **Go Decision:** Successfully initiate the program, establish key partnerships, and launch recruitment efforts in line with the project schedule.
- **No-Go Decision:** Significant delays or issues in program initiation, partnership establishment, or recruitment strategy execution.

2. First 125 Single-Family Units Weatherized (12 Months)

- **Go Decision:** Successfully weatherize the first 125 single-family units within the specified time frame.
- **No-Go Decision:** Failure to weatherize the first 125 units within the defined time frame or significant quality issues in the completed weatherization work.

Year 2:

3. Achievement of 20% Weatherization Completion (24 Months)

- **Go Decision:** Successfully weatherize at least 20% of the total target single-family units within the project schedule.
- **No-Go Decision:** Failure to reach the 20% weatherization completion milestone within the specified time frame or significant quality issues in the completed work.

4. Workforce Development Progress (30 Months)

Piedmont Triad Regional Council RFP Response – Weatherization of Single-Family Units

- **Go Decision:** Demonstrable progress in workforce development efforts, including the training and integration of apprentices into the workforce.
- **No-Go Decision:** Lack of progress in workforce development efforts or failure to integrate apprentices into the workforce as required by BIL funding.

A detailed budget, including a line item for the number of single-family dwellings.

Piedmont Triad Regional Council (PTRC) Weatherization Program Budget (3-Year Project w/2-year Extension)

Budget Notes:

- Contractor services include payments to weatherization contractors and contracted energy audit services.
- Energy audits and Quality Control Inspections (QCI) are performed by PTRC staff.
- Contractor oversight and management expenses cover PTRC staff responsible for supervising contractor work.
- Outreach and recruitment expenses support marketing campaigns and community engagement efforts.
- Workforce development funds are allocated for training programs and apprenticeship support.
- Data collection and reporting costs involve managing project data and reporting to relevant authorities.
- Emergency repairs and deferral reduction include health and safety, structural, and energy efficiency upgrades performed by contractors.
- Resilient energy grid upgrades enhance energy efficiency and clean energy integration through contracted services.
- Miscellaneous expenses encompass contingency funds and administrative costs.

This budget is designed to ensure the successful execution of the PTRC BIL Weatherization Program over a 3-year period (with a 2-Year Extension), weatherizing 1,400 single-family dwellings, with all work performed by contractors, except for initial audits and QCI audits, and aligning with the allocated funding of \$15,442,357.

BUDGET AND PRODUCTION PLANNING			EXPENDITURES		
			Program Ops	Health & Safety	Admin
Region Allocation	\$15,442,357	Salaries/Wages	\$3,906,663	\$ -	\$ -
Total Admin	\$1,489,991	Fringe Benefits	\$1,777,532	\$ -	\$ -
Program Opsa	\$11,161,893	Travel	\$334,857	\$ -	\$ -
Health/Safety	\$2,790,473	Materials	\$2,642,841	\$1,400,000	\$ -
Total Budget Check	\$15,442,357	Contractual	\$2,500,000	\$1,390,473	\$ -
ACPU Ops	\$8,007	Indirect	\$ -	\$ -	\$1,489,991
		Total	\$11,161,893	\$2,790,473	\$1,489,991
ACPU Total	\$8,007	<- The BIL ACPU is \$8,009 for all years.			

Piedmont Triad Regional Council RFP Response – Weatherization of Single-Family Units

	PRODUCTION		EXPENDITURES		
Quarterly Performance Period	Number of Planned Units		Program Operations	Health & Safety	Administration
Q1 (tentative start January 1, 2024)	25	2024	200,177.42	50,044.35	26,721.50
Q2	25		200,177.42	50,044.35	26,721.50
Q3	25		200,177.42	50,044.35	26,721.50
Q4	50		400,354.84	100,088.70	53,443.01
Year 1 Subtotal	125		1,000,887.10	250,221.75	133,607.51
Q1	50	2025	400,354.84	100,088.70	53,443.01
Q2	50		400,354.84	100,088.70	53,443.01
Q3	50		400,354.84	100,088.70	53,443.01
Q4	50		400,354.84	100,088.70	53,443.01
Year 2 Subtotal	200		1,601,419.36	400,354.80	213,772.04
Q1	75	2026	600,532.26	150,133.05	80,164.51
Q2	75		600,532.26	150,133.05	80,164.51
Q3	75		600,532.26	150,133.05	80,164.51
Q4	75		600,532.26	150,133.05	80,164.51
Year 3 Subtotal	300		2,402,129.04	600,532.20	320,658.04
Q1	100	2027	800,709.68	200,177.40	106,886.01
Q2	100		800,709.68	200,177.40	106,886.01
Q3	100		800,709.68	200,177.40	106,886.01
Q4	100		800,709.68	200,177.40	106,886.01
Year 4 Subtotal	400		3,202,838.72	800,709.60	427,544.04
Q1	123	2028	984,872.91	246,218.21	131,469.79
Q2	123		984,872.91	246,218.21	131,469.79
Q3	123		984,872.96	246,218.23	131,469.79
Q4	0		-	-	-
Year 5 Subtotal	369		2,954,618.78	738,654.65	394,409.37
TOTAL	1,394		11,161,893.00	2,790,473.00	1,489,991.00
			15,442,357.00		

Certificate of Insurance

Issue Date (MM/DD/YYYY)
09/07/2023

Named Participant

Piedmont Triad Regional Council
1398 Carrollton Crossing Drive
Kernersville, NC 27284

This Certificate is issued as a matter of information only and confers no rights upon the Certificate Holder. This Certificate does not amend, extend or alter the coverage afforded by the Policies below.

Companies affording Coverage

A = Interlocal Risk Financing Fund of North Carolina

B = North Carolina Interlocal Risk Management Agency

COVERAGES

THIS IS TO CERTIFY THAT THE COVERAGE LISTED BELOW IS AFFORDED TO THE PARTICIPANT NAMED ABOVE FOR THE 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 COVERAGE DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH PROGRAM.

Co Ltr	Type of Coverage	Policy Number	Effective Date	Expiration Date	Limits of Liability	
A	GENERAL LIABILITY <input checked="" type="checkbox"/> Commercial General Liability <input type="checkbox"/> Claims Made <input checked="" type="checkbox"/> Occurrence	██████████	07/01/2023	07/01/2024	Products-Comp/Operations Personal & Adv. Injury Each Occurrence Fire Damage (Any one fire) Med. Expense (Any one Deductible	\$5,000,000 \$5,000,000 \$5,000,000 \$1,000,000 N/A \$500
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> Any Auto (Symbol 1) <input type="checkbox"/> Hired Autos (Symbol 8) <input type="checkbox"/> Non-Owned Autos (Symbol 9) <input type="checkbox"/> Uninsured/Underinsured Motorists	██████████	07/01/2023	07/01/2024	Limit CSL \$5,000,000	Deductible \$500
A	PROPERTY <input checked="" type="checkbox"/> Real & Personal Property <input type="checkbox"/> Builder's Risk	██████████	07/01/2023	07/01/2024	Limit \$6,893,035	Deductible \$500
A	<input checked="" type="checkbox"/> Auto Physical Damage (Symbol 7 & 8) <input type="checkbox"/> Municipal Equipment	██████████	07/01/2023	07/01/2024	Per Scheduled Item	Per Scheduled Item
A	<input checked="" type="checkbox"/> Computer Equipment & Media	██████████	07/01/2023	07/01/2024	\$750,000	\$500
A	<input checked="" type="checkbox"/> Portable Equipment	██████████	07/01/2023	07/01/2024	\$3,000	\$500
A	<input checked="" type="checkbox"/> Fine Arts	██████████	07/01/2023	07/01/2024	\$50,000	\$1,000
	Police Professional Liability <input type="checkbox"/> Claims Made <input type="checkbox"/> Occurrence				Limit(per occurrence/aggregate)	Deductible
A	Public Officials Liability <input checked="" type="checkbox"/> Claims Made <input type="checkbox"/> Occurrence	██████████	07/01/2023	07/01/2024	Limit(each claim/aggregate) \$5,000,000/\$5,000,000	Deductible \$10,000
A	Employment Practices Liability <input checked="" type="checkbox"/> Claims Made <input type="checkbox"/> Occurrence	██████████	07/01/2023	07/01/2024	Limit(each claim/aggregate) \$5,000,000/\$5,000,000	Deductible \$10,000
	Workers' Compensation <input type="checkbox"/> Workers' Compensation and Employer's Liability <input type="checkbox"/> WC Statutory Limit				Limit Each Accident Disease - Each Employee Disease - Policy Limit	
A	OTHER COVERAGE <input checked="" type="checkbox"/> Crime - Inside the Premises - Theft of Money	██████████	07/01/2023	07/01/2024	Limit \$50,000	Deductible \$250
A	<input checked="" type="checkbox"/> Crime - Outside the Premises	██████████	07/01/2023	07/01/2024	\$50,000	\$250

Description

Evidence of coverage

Certificate Holder

EVIDENCE OF COVERAGE

Cancellation

Should any of the above described coverages be cancelled before the expiration date thereof the issuing company will endeavor to mail 30 days written notice to the certificate holder named to the left, but failure to mail such notice shall impose no obligation or liability of any kind upon the company, its agents or representatives.

Authorized Representative

Michael Pittman

Andrew Hassell Corbett III

OBJECTIVE:

A position that will utilize my interpersonal skills that I have obtained over a period of years in customer service as well as my technical skills in many aspects of remodeling, construction, and energy efficiency field that will allow me the opportunity to become a valued employee and a chance to give back to the community.

QUALIFICATIONS:

I have over 25 years experience in all areas of remodeling construction from framing to vinyl siding, installing windows, laying carpet, tile, painting, pulling and installing cable as well as area of general maintenance. I have over 14 years of experience in the weatherization field as an installer, crew leader, auditor, lead inspector and currently supervisor. I have 5 years of management in the Weatherization Program and hold numerous certifications in the energy efficiency field. I am very dependable, hard worker who communicates and works well with people. I am a volunteer fireman, I hold a level I and II certification. I have my State EMT certification. I am a member of the Faucette Township Volunteer Fire Department as a Safety Officer and the Leader of the Explorer program in the Department.

EDUCATION:

Graduated from Eastern Alamance High School, Mebane, 1995

Attended Alamance Community College and obtained Firefighters Level I and II and EMT Basic – 2004

EMPLOYMENT:

7-2018 – current Piedmont Triad Regional Council

Community Development Weatherization Department - Supervisor

Supervisor over the Weatherization Department. Duties involve supervision over Weatherization staff and ensuring goals are met throughout program. Also continuing my education in the energy field while auditing homes and completing final inspections.

11-2014 - 7-2018 Piedmont Triad Regional Council

Weatherization Department - Auditor

Initial auditor and QCI Inspector. Initially inspect homes for energy efficient measures and create work orders for contractors. Oversee jobs and paperwork as they are in progress and give final QCI inspections.

01-2014 - 06-2014 Alamance County Community Services

Weatherization Department - Auditor

Evaluate homes to initiate work order of materials for the weatherization crew to install. Oversee HVAC and electrical subcontractors in the installation of heating systems. Inspect the quality of work and that all materials have been installed properly in accordance to the NC Weatherization Standards in the client's home.

07-2011 - 12-2013 Alamance County Community Services

Weatherization Department - Crew Leader

Oversee the weatherization crew. Install materials in homes. Complete the work order by making sure all materials were installed at the job and all receipts match items installed. All areas of instillation and carpentry work and air sealing to make homes more energy efficient.

09-2009 - 06-2011 Alamance County Community Services

Carpenter

Install materials in client's homes to make them more energy efficient in accordance to the North Carolina Weatherization Standards.

01-2000 – 3-2009 Turner & Company

Subcontractor

Construction remodeling as well as new construction

Performed all areas of building. Laid off due to the economic situation

TRAINING:

01/2004	EMT-B Certifications
2/2010	NC WAP Crew Basic Course – Central Carolina Community College
01/2012	OSHA 10 Hour Course
2/2011	NC Weatherization Mid-Winter Training
02/2012	AHERA Supervisor Initial Training Course
4/2012	OSHA Construction Industry 30-hour course
03/2012	OSHA 40 hour course
05/2013	Weatherization Assistant 8.6 Training
07/2015	BPI
08/2015	HVAC Fundamentals
08/2015	Manufactured Housing Fundamentals
06/2019	North Carolina Housing Finance Agency Urgent Repair Program Implementation Workshop
10/2021	Energy Auditor
01/2021	Quality Control Inspector
02/2022	Lead Renovation Repair and Painting

Michael Blair, AICP



Professional Licenses and Memberships:

American Institute of Certified Planners (AICP) - American Planning Association (APA)
North Carolina Community Development Association (NCCDA)
HUD Certified Specialist – Administration and Regulations

Experience:

2019 – Current

**Regional Community Development Director, Piedmont Triad Regional Council;
Kernersville, NC Annual Budget - \$14,000,000; 25 FTE**

- Responsible for the PTRC Regional Community Development Department work plan, budget, and staff. Including strategies for achieving organizational objectives, and performance measures designed to show outcomes.
- Management of staff, housing conditions (minimum housing codes), Civil Rights, Fair Housing, Conflict Resolution, and budget oversight for a four county, 800 household, Section 8 Housing Choice Voucher program in Surry, Stokes, Yadkin and Davie counties.
- Direct and manage the Surry County HOME Program Consortium (SCHC) in Surry, Stokes, Davie and Yadkin counties. The program includes new affordable rental housing construction (>488 units/\$30,000,000), rental rehabilitation and single family rehabilitation and construction. Work includes agenda preparation, financial analysis of affordable housing applications, and board meeting management.
- Contracted Community Development Manager for the City of Burlington.
- Direct and manage North Carolina Housing Finance Agency (NCHFA) single family housing rehabilitation grant programs in a 15 county region.
- Management of staff, and budget oversight for an eight county Weatherization program in Forsyth, Guilford, Rockingham, Alamance, Caswell, Davidson, Person and Randolph counties.
- Prepare annual and five year consolidated affordable housing plans.
- Facilitate Appalachian Regional Commission grants.
- Economic Development (including EDA/CEDS) planning

October 2018 - March 2019

Community Development Director, City of Asheville

- Coordinate City functions related to housing, homelessness, community development, and revitalization; recommends policy for City Council and management.
- Coordinate CED staff working on High Impact sites and City-owned land.
- Implement and administer grant programs --CDBG, HOME, and CoC (Continuum of Care Homeless Program) grants-- ensuring compliance with state, federal and local laws, and departmental policies and procedures; manages applications, loans, budgets, disbursements, etc.

- Ensures citizen and stakeholder participation in developing strategic and action plans.
- Supervises program staff; organizes and prioritizes projects; manages workflow.
- Serves as principal staff to City Council Housing and Community Development Committee
- Prepares reports and delivers presentations regarding community development activities.

2012 – 2018

**Regional Housing Services Director, Piedmont Triad Regional Council; Kernersville, NC
Annual Budget - \$10,500,000; 20 FTE**

- Responsible for the PTRC Regional Housing Services Department work plan, budget, and staff. Including strategies for achieving organizational objectives, and performance measures designed to show outcomes.
- Management of staff, housing conditions (minimum housing codes), Fair Housing, Conflict Resolution, SEMAP, PIC, and budget oversight for a four county, 800 household, Section 8 Housing Choice Voucher program in Surry, Stokes, Yadkin and Davie, counties.
- Management of staff, and budget oversight for a seven county, Weatherization program in Forsyth, Guilford, Rockingham, Alamance, Caswell, Davidson, and Randolph counties.
- Managed Code Enforcement activities in the Town of Rural Hall (Forsyth County).
- Direct and manage North Carolina Housing Finance Agency (NCHFA) single family housing rehabilitation grant programs in a 12 county region.
- Direct and manage the Surry County HOME Program Consortium (SCHC) in Surry, Stokes, Davie and Yadkin counties.
- Prepare annual and five year consolidated affordable housing plans.
- Facilitate Appalachian Regional Commission grants.
- Economic Development (including EDA/CEDS) planning.

2004 - 2012

Grants Planner, Dept. of Planning and Community Development, City of Greensboro

- Prepared and presented affordable housing and policy reports to local officials; advised and coordinated with departmental staff, appointed board members, and interdepartmental teams.
- Administered the operation of the Greensboro Housing Consortium (HOME Program).
- Management of the City Affordable Housing Loan Portfolio.
- Administered contracting and monitoring of locally and federally funded Homeless Shelters/Centers (13 nonprofits) for performance and client eligibility.
- Responsible for overall federal CDBG/HOME/ESG/HOPWA compliance.
- HOME Program and CDBG budget preparation for both HUD Annual Plans.
- Primary liaison with the US Department of Housing and Urban Development (HUD) and the North Carolina Housing Finance Agency (NCHFA).
- Assigned planning and reporting responsibilities for the 2009 American Recovery and Reinvestment Act (ARRA). Part of overall city ARRA planning.
- Organized and presented annual fiduciary responsibilities training for nonprofit directors from 2004 to 2012.

2001- 2004

Planner, Planning and Community Development, City of Punta Gorda; Punta Gorda, Florida

- Involved in all phases of general land use planning for a rapidly growing, high quality, coastal community in South Florida.
- Administered CDBG Entitlement program including HUD/IDIS reporting and activity management. Prepared CDBG budget information & prepared Annual Action Plan.
- Responsible for researching and developing new ordinances for PUDs, and overlay districts.
- Provide regular presentations to elected and appointed officials.
- Project manager for redevelopment activities in the redevelopment area of Punta Gorda.
- Managed homeowner rehabilitation program.

1998-2000

Owner, Retail Business, Krakow, Poland

- Secured Venture Financing to opened a first of its kind retail establishment in Poland.
- Managed upfit of retail space including plans and permitting.
- Hired, trained, and managed staff.
- Marketed service through existing print media.

Education:

- Bachelor of Arts, Political Science, Florida Atlantic University
- Professional Graduate Certificate in Citizen-Driven Public Performance Measures, Rutgers University

Boards and Commissions Served:

- North Carolina Community Development Association Board of Directors 2010 -2019; Board, President - 2017 - 2019
- Peace River Basin, Technical Advisory Committee (Punta Gorda, Florida)- 2001-2003

Recent Conference Presentations Awards and Training:

- North Carolina Housing Finance Agency (NCHFA) 2021 Affordable Housing Award - NC's largest Rehabilitation and Weatherization Cooperation Program.
- National Association of Development Organizations (NADO) 2020 Impact Award - Community Development/Housing Service Delivery Continuity During COVID-19
- New Fair Housing Rules and Tools/NC Human Relations Commission - Cary, NC - December 2, 2016 - Panelist and HUD GIS website training provider.
- North Carolina Community Development Association (NCCDA), Asheville – May 26, 2016 EDA Grants. Moderator; Who, What, When, Where & How of Marketing Through FREE Media. Moderator.
- National Association of Development Organizations (NADO) – 2015 Innovation Awards – “GIS Mapping Application to identify areas for rehabilitation and development programs” and “NC CDBG Guidebook for Local Government Officials and Staff”.

Nikia L. Beal



Experience

❖ Secretarial & Office Skills

Provided excellent customer service, answered multi-line telephones, routed calls, processed oral and written orders, scheduled appointments, knowledge of filing systems, efficient with little or no supervision, knowledge of medical terminology, implemented and maintained organizational system, operated all office equipment and computers, ability to manage multiple tasks in a pressured environment, handled heavy workloads, maintained and updated office documents, proficient in Word Perfect, Microsoft, Windows QuickBooks and Excel, data entry, sending out and receiving packages, scheduling and coordinating meetings.

❖ Sales & Customer Service

Familiar with all aspects of banking procedures common to general bank teller, kept account of all monies given and received, cashed checks depositing and withdrawing money from various accounts, maintained accurate records for the company, kept track of payroll, pricing merchandise, stocking and organizing shelves, performed store openings and closings, supervised and trained new employees, consistently entrusted with large sums of money.

❖ Bookkeeping & Administrative Skills

Issued checks to employees, maintained inventory control, managed accounts receivable and payable functions, matched invoices to records, maintained all daily records of financial transactions, collections, customer invoicing, produced quarterly and annual financial reports, organized and scheduled workloads, entrusted to process confidential employee records such as salary changes, delivered excellent customer service, typing out of letters, managing budgets.

Work History

Piedmont Triad Regional Council	WAP Administrative Coordinator	4/15 - Present
Audio Video Repair Center	Dispatch Asst. Supervisor	10/09 – 2/14
New Liberty FGB Church	Secretary	5/02 – 1/10
Days Inn Hotel	Sales Assistant, Front Desk	1/07 – 12/09
Professional Health Care	Office Assistant	7/05 – 7/07
Adam's Mark Hotel	Res. Agent, PBX Operator, Front Desk	9/03 – 2/05
Ross Dress for Less	Cashier, Cash Office	8/02 – 1/03
Wal-Mart Super Center	Layaway Associate	7/99 – 10/01

Education

1998	Parkland High School	Diploma
2001	Forsyth Technical Community College	Unit Secretary
2013	Forsyth Technical Community College	Paralegal Tech



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

06/27/2023

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 Surry Insurance P. O. Box 128 Dobson NC 27017-0128		CONTACT NAME: [REDACTED] PHONE (A/C, No, Ext): [REDACTED] FAX (A/C, No): [REDACTED] E-MAIL ADDRESS: [REDACTED]	
		INSURER(S) AFFORDING COVERAGE	
		INSURER A: Westchester Suplus Lines Insurance Company	NAIC # 10172
		INSURER B:	
		INSURER C:	
		INSURER D:	
		INSURER E:	
		INSURER F:	
INSURED Piedmont Triad Regional Council 1398 Carrollton XING Drive Kernersville NC 27284-3896			

COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. 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
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO- <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / N If yes, describe under DESCRIPTION OF OPERATIONS below		N/A				<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Contractors Pollution Liability			[REDACTED]	05/23/2023	05/23/2024	GENERAL AGG. 1,000,000 CONT. POLL LIAB. 1,000,000

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

CERTIFICATE HOLDER**CANCELLATION**

N.C DEQ/Weatherization Assistance Program

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

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Certificate of Insurance

Issue Date (MM/DD/YYYY)
09/07/2023

Named Participant

Piedmont Triad Regional Council
1398 Carrollton Crossing Drive
Kernersville, NC 27284

This Certificate is issued as a matter of information only and confers no rights upon the Certificate Holder. This Certificate does not amend, extend or alter the coverage afforded by the Policies below.

Companies affording Coverage

A = Interlocal Risk Financing Fund of North Carolina

B = North Carolina Interlocal Risk Management Agency

COVERAGES

THIS IS TO CERTIFY THAT THE COVERAGE LISTED BELOW IS AFFORDED TO THE PARTICIPANT NAMED ABOVE FOR THE 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 COVERAGE DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH PROGRAM.

Co Ltr	Type of Coverage	Policy Number	Effective Date	Expiration Date	Limits of Liability	
A	GENERAL LIABILITY <input checked="" type="checkbox"/> Commercial General Liability <input type="checkbox"/> Claims Made <input checked="" type="checkbox"/> Occurrence	██████████	07/01/2023	07/01/2024	Products-Comp/Operations	\$5,000,000
					Personal & Adv. Injury	\$5,000,000
					Each Occurrence	\$5,000,000
					Fire Damage (Any one fire)	\$1,000,000
					Med. Expense (Any one	N/A
					Deductible	\$500
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> Any Auto (Symbol 1) <input type="checkbox"/> Hired Autos (Symbol 8) <input type="checkbox"/> Non-Owned Autos (Symbol 9) <input type="checkbox"/> Uninsured/Underinsured Motorists	██████████	07/01/2023	07/01/2024	Limit CSL \$5,000,000	Deductible \$500
A	PROPERTY <input checked="" type="checkbox"/> Real & Personal Property <input type="checkbox"/> Builder's Risk	██████████	07/01/2023	07/01/2024	Limit \$6,893,035	Deductible \$500
A	<input checked="" type="checkbox"/> Auto Physical Damage (Symbol 7 & 8) <input type="checkbox"/> Municipal Equipment	██████████	07/01/2023	07/01/2024	Per Scheduled Item	Per Scheduled Item
A	<input checked="" type="checkbox"/> Computer Equipment & Media	██████████	07/01/2023	07/01/2024	\$750,000	\$500
A	<input checked="" type="checkbox"/> Portable Equipment	██████████	07/01/2023	07/01/2024	\$3,000	\$500
A	<input checked="" type="checkbox"/> Fine Arts	██████████	07/01/2023	07/01/2024	\$50,000	\$1,000
	Police Professional Liability <input type="checkbox"/> Claims Made <input type="checkbox"/> Occurrence				Limit(per occurrence/aggregate)	Deductible
A	Public Officials Liability <input checked="" type="checkbox"/> Claims Made <input type="checkbox"/> Occurrence	██████████	07/01/2023	07/01/2024	Limit(each claim/aggregate) \$5,000,000/\$5,000,000	Deductible \$10,000
A	Employment Practices Liability <input checked="" type="checkbox"/> Claims Made <input type="checkbox"/> Occurrence	██████████	07/01/2023	07/01/2024	Limit(each claim/aggregate) \$5,000,000/\$5,000,000	Deductible \$10,000
	Workers' Compensation <input type="checkbox"/> Workers' Compensation and Employer's Liability <input type="checkbox"/> WC Statutory Limit				Limit Each Accident Disease - Each Employee Disease - Policy Limit	
A	OTHER COVERAGE <input checked="" type="checkbox"/> Crime - Inside the Premises - Theft of Money	██████████	07/01/2023	07/01/2024	Limit \$50,000	Deductible \$250
A	<input checked="" type="checkbox"/> Crime - Outside the Premises	██████████	07/01/2023	07/01/2024	\$50,000	\$250

Description

Evidence of coverage

Certificate Holder

EVIDENCE OF COVERAGE

Cancellation

Should any of the above described coverages be cancelled before the expiration date thereof the issuing company will endeavor to mail 30 days written notice to the certificate holder named to the left, but failure to mail such notice shall impose no obligation or liability of any kind upon the company, its agents or representatives.

Authorized Representative

Michael Pittman