

LOW-INCOME WEATHERIZATION PROGRAM

(RFP DISCUSSION - 2015-16 APPROPRIATION)

Department of Community Services and
Development

October 7, 2016



WELCOME

Linne Stout, CSD Director



CSD Overview

CSD works to improve the lives of low-income Californians. In part, by providing weatherization and renewables to help households reduce energy use and energy costs.

For more information about CSD , please visit our website:

www.csd.ca.gov

LIWP Overview

- LIWP is one component of the State of California's "Cap & Trade" program, funded through the California Climate Investments to invest in residential Energy Efficiency and Renewables for low-income California's living in Disadvantaged Communities (DACs).
- To date, CSD has been allocated \$174M in funding.
- Via an upcoming RFP, CSD intends to allocate \$57.6M for single-family energy efficiency and solar PV

LIWP Objectives

Primary Objective

- Reduce greenhouse gas (GHG) emissions by improving energy efficiency in low-income households

Co-Benefits

- Reduce energy usage and energy cost for low-income residents
- Create jobs
- Create investment in local communities

TODAY'S PURPOSE

Discuss CSD's approach to our upcoming Request for Proposal (RFP) and receive feedback from potential bidders and other interested parties

Follow-up to our June 2 Stakeholder Meeting

“What do they really want?”

As you prepare your bid you may find yourself asking this question. Bids require a lot of detail and it's easy to get lost in the details.

In these next few slides, we'll outline CSD's Vision for LIWP. These are the core program components that are the most important to CSD.

CSD's Vision for LIWP

Planning

- Partner with a diversity of firms to carry out the goals of LIWP (including CA certified small business and DVBEs)
- Leverage funding resources
- Plan for—and achieve—pre-determined goals for regular expenditure of dollars and homes served

Measures

Install all feasible measures in each home

Install only cost effective measures

CSD's Vision for LIWP

Customers and Community

- Minimize negative impact on customers (disruption) by careful coordination and delivery of measures.
- Maximize the benefits of customer energy education
- Maximize the hiring and or training of unemployed/underemployed individuals living in the disadvantaged communities you serve.
- Maximize investment in the local DAC economy.

OVERVIEW OF THE REGIONAL ADMINISTRATOR (RA) MODEL

Low Income Weatherization Program (LIWP)

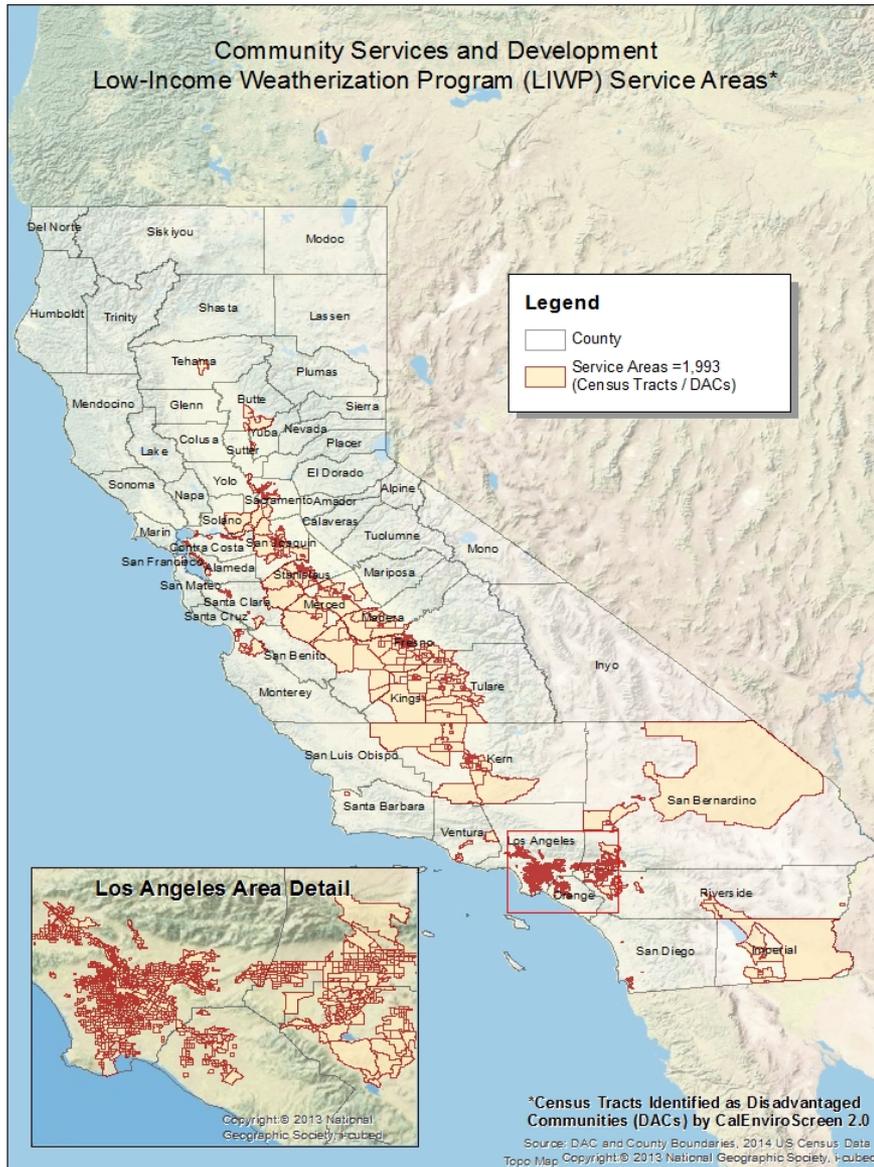
- CSD has divided the state into five “regions” which encompass all of the state’s disadvantaged communities.
- Bidders will bid by region.
- Bidders may bid to be the Regional Administrator on one or more regions.

Regional Model

Proposed 5-Region Concept

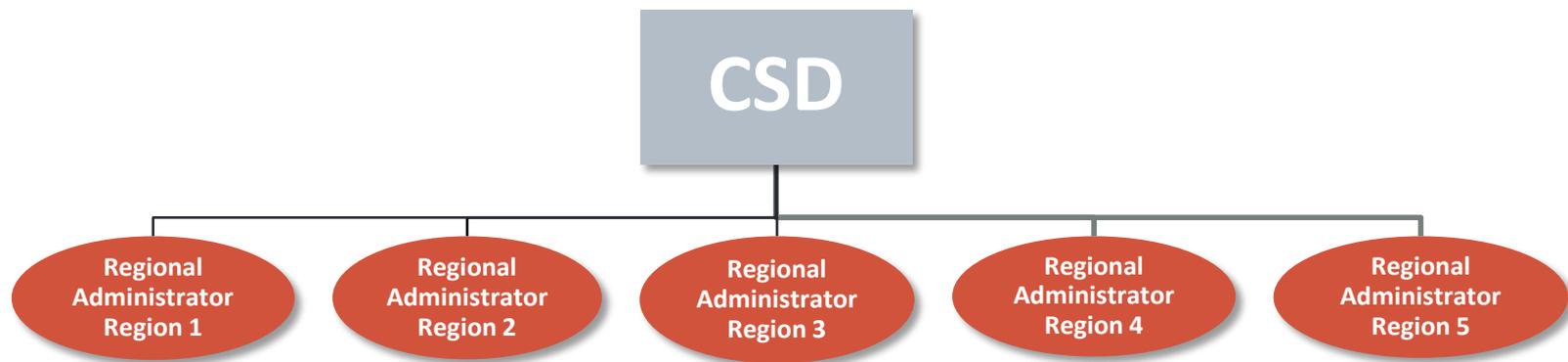


How Regions Relate to DACs



Proposed Regional Model

CSD selects non-profit Regional Administrators (RAs) through the RFP process:



Each Regional Administrator selects their region's subcontractors to ensure fulfillment of all of these LIWP goals:



Regional Administration Allocations

- Base allocation in recognition of need for ramp-up and building capacity for service delivery over short program timeframe (\$2.5 M for energy efficiency)
- Remaining EE dollars allocated proportionally to each region, based on federal poverty population data
- Solar PV allocations (total of \$23 M) based on an estimate of the frequency of installation of Solar PV for households receiving energy efficiency upgrades in each region

Region	# of DAC Census Tracts	Low-Income Population (200% FPL)	Estimated Energy Efficiency Allocation	Estimated Solar PV Allocation
Region 1	55	142,227	\$3.1M	\$2.1M
Region 2	91	208,156	\$3.4M	\$2.3M
Region 3	431	1,283,447	\$8.1M	\$5.4M
Region 4	1,027	2,350,373	\$12.7M	\$8.4M
Region 5	389	1,114,702	\$7.3M	\$4.9M

Q&A



RFP ELEMENTS

Legal - Contracting and Procurement

Purpose of solicitation

- Identify best contractor as defined by criteria for selection;
- Proposal forms basis for contract

Procurement philosophy - Underlying Objectives

- Inclusive and open – maximize potential productive industry resources available to program
- Provide access to the most qualified organizations.

Contracting Model – Legal Instrument

- Local assistance/ subvention agreement

Legal - Contracting and Procurement

Who is eligible?

- Local Governmental Agencies
- Non-profits

LIWP Procurement Policy – Bidder's Library

- Based on PCC, SCM and Program Guidelines
- Competitive and fair
- Unique to CSD; will address needs of LIWP
 - Re-procurement and negotiations
 - Award protest process
 - Conflicts of interest

Legal - Contracting and Procurement

Who is accountable?

- RA/Prime contractor (non-profit or local governmental agency)
- Functional role of team members/ organizational model TBD by Proposer

Focus of the Evaluation and Scoring

- Qualification of RA to administer program
- Qualifications and capacity of team members to deliver
- Afford flexibility of approach, while enabling comparative analysis

Legal - Contracting and Procurement

Conflict of Interest Considerations – Bidder's Library

- **Challenge:** Limited universe of contractors and consultants and the extent of the contractual relationships between CSD and potential participants in the solicitation
- **Competing Objectives:** Optimize the contractor pool while ensuring open and fair process
- **Plan:** Limit disqualifying conflicts to those causing unfair advantage, e.g. significant role in program design or procurement process.
- **Require:** All contractors and consultants who have had or have contractual relationships with CSD to complete disclosure statements, to be posted in bidder's library for public inspection.

Q&A



REGIONAL ADMINISTRATOR RESPONSIBILITIES

Regional Administrator Responsibilities



We'll now address each of these responsibilities in more detail.

Marketing and
Outreach



Marketing and Outreach

The Regional Administrator is responsible for all aspects of marketing and outreach

- During the bidding process, bidders will submit a detailed marketing plan to identify where they intend to market and how they will achieve their goals. The plan will include marketing deliverables.
- For selected RAs, marketing plans will be firmed up during contract negotiations.
- CSD will monitor to marketing deliverables.

Customer
Eligibility &
Intake



Eligibility and Intake

Household eligibility for LIWP established in one of three ways:

1. Household Income Verification
2. Categorical Eligibility
3. Neighborhood Eligibility

Customer
Eligibility &
Intake



Eligibility and Intake

Income Verification

- Income eligibility will be based on the either 80% AMI or 60% SMI, whichever is highest in each county.
 - In some instances 60% SMI is higher than 80% AMI in counties that tend to have lower overall incomes.

Customer
Eligibility &
Intake



Eligibility and Intake

Categorical Eligibility (CE)

- CSD will use the same CE programs as the IOUs use for ESAP
- Customers who show adequate proof of one of the following qualify to receive services (excluding solar PV, which requires income documentation):

Bureau of Indian Affairs	LIHEAP	Medi-Cal	Medi-Cal for Families
National School Lunch Program	CalFRESH (Food Stamps)	SSI (Supplemental Security Income)	TANF
Tribal Head Start	Tribal TANF	WIC	---

Customer
Eligibility &
Intake



Eligibility and Intake

Neighborhood Eligibility

- Neighborhood Eligibility is intended to serve as a “foot in the door” in 130 of the most disadvantaged census tracts identified as follows:
 - The top 5th percentile of disadvantaged communities ranked as most burdened by CalEnviroScreen 2.0 AND disadvantaged communities in the highest 5th percentile for poverty population based on U.S. census data
- No income documentation is required to provide the basic package of measures to single family homes in these census tracts.
- Program goal is to assess for and install deeper measures where qualified

See Exhibit IV in the 2015-16 Draft Program Guidelines for Single-Family EE and Solar PV for a complete list of “Neighborhood Eligible” census tracts 📄

Customer
Eligibility &
Intake



Eligibility and Intake

Neighborhood Eligibility (Cont.)

**EXHIBIT IV: LIST OF CENSUS TRACTS FOR NEIGHBORHOOD
ELIGIBILITY FOR BASIC LIWP PACKAGE**

County	Region	Census Tract	Climate Zone	City	Poverty Population
Sacramento	1	6067004502	12	Sacramento	3,511
Yolo	1	6113010203	12	West Sacramento	3,777
Alameda	2	6001408800	3	Oakland	3,916
Fresno	3	6019000400	13	Fresno	3,845
	3	6019000600	13	Fresno	4,787
	3	6019000902	13	Fresno	4,206
	3	6019001201	13	Fresno	3,603
	3	6019001301	13	Fresno	3,653
	3	6019001304	13	Fresno	5,028
	3	6019001407	13	Fresno	3,465
	3	6019001410	13	Fresno	6,385
	3	6019002000	13	Fresno	4,220
	3	6019002501	13	Fresno	4,626
	3	6019002502	13	Fresno	4,569
	3	6019002601	13	Fresno	4,125
	3	6019002702	13	Fresno	4,478
	3	6019002800	13	Fresno	3,933
	3	6019002903	13	Fresno	3,701
	3	6019003202	13	Fresno	4,300
	3	6019003400	13	Fresno	3,518
	3	6019004205	13	Fresno	3,790

Example
from
Program
Guidelines

Project
Coordination



Project Coordination

The Regional Administrator is responsible for coordinating the work at each home.

Reduce the impact on the household by:

- Minimizing number of visits and considering client work schedules
- Coordinating the work of subcontractors
- Considering work hours outside the traditional “8 – 5”
- Managing and minimizing the time from Intake to Installation
- Billing may occur once both EE measures and solar PV are installed 🗨️

Q&A



Assessment



Assessment & Energy Audits

RAs will ensure subcontractors perform appropriate assessments to enable homes to receive a full complement of feasible LIWP measures where qualified

- Some of the more complex measures will require an energy audit. More on this later.
- Though multiple contractors may be performing assessments, the RA is responsible for instructing contractors in the use of proper forms and audits and ensuring those tools are used correctly.
- If multiple subcontractors are necessary to deliver services to a home, RAs will ensure project coordination and minimal disruption to customers.

All feasible LIWP measures must be assessed for and installed

Assessment



Diagnostic Tools & Measure Standards

CSD will utilize established industry standards for diagnostic testing required to install certain LIWP measures

- Combustion Appliance Testing – CSD will accept the results from any of the following protocols:
 - CSD’s CAS
 - IOU-ESA Program NGAT
 - BPI-Based CAS for Energy Upgrade California
 - BPI CAS Protocol
- Duct Testing – HERS Protocol
- Measure Installation Standards - CSD will publish installation standards for all LIWP measures as part of the RFP – Examples of two of these standards are available today as handouts 

Measure
Installation



Measures

CSD has developed a pre-defined list of measures that may be installed

(Please see Exhibit V in the 2015-16 Draft Program Guidelines for a complete list of measures) 

- Other measures cannot be added, as this list of measures has been approved by the Air Resources Board (ARB).
- Each measure has an associated method for calculating GHG-reduction. Some measures use a deemed-savings approach. Others require an audit.
- Measures are divided into five categories:
 - Basic
 - Enhanced
 - Enhanced - Audit
 - Solar Water Heating
 - Solar PV

Measures Overview

Basic LIWP Package

The basic package includes measures with deemed energy savings that are cost effective in all climate zones.

Enhanced & Audited Measures (Includes Solar Water Heater)

For all Enhanced LIWP measures Household Income Verification or Categorical Eligibility are required to be established.

- Climate zone restrictions may apply
- Some measures require combustion appliance safety (CAS, NGAT, BPI) testing
- Some measures require an energy audit to demonstrate SIR = >1.0
- Specialty licenses will be required for certain measures

Solar PV

For Solar PV, eligibility may only be established through Household Income Verification.

Measures Overview

Measure / Package Type	Eligibility Options			
	Neighborhood Approach	Categorical Eligibility	Income Verification	Climate Zone Restrictions
Basic	X	X	X	
Enhanced		X	X	X
Enhanced / Audit		X	X	X
Solar Water		X	X	
Solar PV			X	



LIWP Bid Calculator

LIWP Bid Calculator

Rev. 10/4/2016

Number of Homes Served		2,500	Number of Homes Served by Building Type	
Housing Type Region	Single Family	CZ	Single Family	2000
			Mobile Home	500
			Small Multi-family	0
			Total	2500

Total must equal number of homes served.

Program Stats

Total Program Cost	\$	4,844,689.05
Total Program Savings (MTCO)		1,879.21
Total Package \$/MTCO	\$	2,578.05
Average per home cost	\$	1,937.88
Average per home MTCO reduction		0.75

Basic LIWP Measures

Measure	Average Qty Installed per Home	Unit	% of homes	# of homes	per Unit Cost	Total Measure Cost	\$/Metric Ton CO	Notes
HOT WATER FLOW RESTRICTOR, FAUCET RESTRICTOR	3.0	per restrictor	80%	2000	\$ 1.00	\$ 30,000.00	\$ 941.62	
HOT WATER FLOW RESTRICTOR, HAND-HELD LOW FLOW SHOWERHEAD	1.0	per restrictor	45%	1125	\$ 24.11	\$ 27,366.85	\$ 605.40	
HOT WATER FLOW RESTRICTOR, LOW FLOW SHOWERHEAD	1.0	per restrictor	22%	552.5	\$ 15.88	\$ 8,828.95	\$ 401.26	
LED BULBS EXTERIOR - 60W EQUIVALENT	1.0	per lamp	64%	1587.5	\$ 15.00	\$ 23,812.50	\$ 1,269.96	
LED BULBS INTERIOR - 60W EQUIVALENT	1.0	per lamp	45%	1125	\$ 15.00	\$ 16,875.00	\$ 2,720.05	
LED NIGHT LIGHTS	1.0	per light	73%	1812.5	\$ 14.31	\$ 25,936.88	\$ 1,628.54	
VACANCY SENSOR	1.0	per sensor	12%	287.5	\$ 43.11	\$ 12,394.13	\$ 3,565.85	
POWER STRIP, TIER 2 ADVANCED	1.0	per strip	30%	750	\$ 91.00	\$ 113,750.00	\$ 1,220.85	
THERMOSTATIC SHOWER VALVE AND SHOWERHEAD	1.0	per valve	11%	270	\$ 47.85	\$ 12,919.50	\$ 948.56	

Enhanced LIWP Measures

Measure	Average Qty Installed per Home	Unit	% of homes	# of homes	per Unit Cost	Total Measure Cost	\$/Metric Ton CO	Notes
CEILING FANS	1.0	per fan	60%	1500	\$ 145.40	\$ 218,100.00	\$ 2,695.89	
CEILING INSULATION, R-30	1200.0	per sqft	10%	250	\$ 1.00	\$ 300,000.00	\$ 734.70	Assumes R0-R30
CEILING INSULATION, R-38	1200.0	per sqft	3%	75	\$ 1.00	\$ 90,000.00	\$ 721.96	Assumes R0-R38
EFFICIENT FAN CONTROLLER - PSC MOTOR	1.0	per motor	15%	375	\$ 100.00	\$ 37,500.00	\$ 847.86	
EFFICIENT FAN CONTROLLER - ECM MOTOR	1.0	per motor	15%	375	\$ 100.00	\$ 37,500.00	\$ 1,354.08	
ECM BLOWER MOTOR	1.0	per motor	15%	375	\$ 400.00	\$ 150,000.00	\$ 3,978.89	
REFRIGERANT CHARGE W/COIL CLEANING, 3 TON	1.0	per unit	20%	500	\$ 100.00	\$ 50,000.00	\$ 523.96	
REFRIGERANT CHARGE W/COIL CLEANING, 4 TON	1.0	per unit	20%	500	\$ 100.00	\$ 50,000.00	\$ 392.90	
REFRIGERANT CHARGE W/COIL CLEANING, 3 TON	1.0	per unit	15%	375	\$ 100.00	\$ 37,500.00	\$ 314.32	
REFRIGERATOR REPLACEMENT, 19 CUBIC FOOT AND BELOW	1.0	per refrigerator	7%	175	\$ 1,003.33	\$ 175,582.75	\$ 4,696.91	
REFRIGERATOR REPLACEMENT, OVER 19 CUBIC FOOT	1.0	per refrigerator	7%	175	\$ 1,200.00	\$ 210,000.00	\$ 5,617.58	
SMART THERMOSTAT	1.0	per thermostat	20%	500	\$ 350.00	\$ 175,000.00	\$ 2,970.43	
WATER HEATER BLANKET	1.0	per blanket	8%	205	\$ 37.90	\$ 7,769.50	\$ 594.79	
WHOLE HOUSE FAN	1.0	per fan	10%	250	\$ 1,200.00	\$ 300,000.00	\$ 7,832.08	
CAULKING	1.0		25%	625	\$ 2.00			
COVER PLATE GASKETS	1.0		10%	250	\$ 2.00			
DOOR REPAIR, EXTERIOR, ALL OTHER TYPES	1.0		2%	50	\$ 2.00			
DOOR REPAIR, SLIDING GLASS 72 x 80 AND SMALLER	1.0		1%	25	\$ 2.00			
DOOR REPAIR, SLIDING GLASS GREATER THAN 72 x 80	1.0		1%	25	\$ 2.00			
GLASS REPLACEMENT	1.0		1%	25	\$ 2.00			
MINOR ENVELOPE REPAIR	1.0		5%	125	\$ 2.00			
WEATHERSTRIPPING, HINGED EXTERIOR DOOR	1.0		10%	250	\$ 2.00			
WEATHERSTRIPPING, OTHER	1.0		10%	250	\$ 2.00			
WINDOW REPAIR	1.0		2%	50	\$ 2.00			

Infiltration Reduction Group

Total Measure Cost: \$ 128,500.00 \$/Metric Ton CO: \$ 4,933.64

LIWP Bid Calculator

- Each region includes between 2 and 7 Climate Zones
- RAs will fill in the number of homes (SF & Mobile) that they will serve by CZ (One tab in Bid Calculator for each CZ)

LIWP Bid Calculator

Number of Homes Served		2,500		Number of Homes Served by Building Type	
Housing Type	<i>Single Family</i>	CZ		Single Family	2000
Region		13		Mobile Home	500
				Small Multi-family	0
				Total	2500
Total must equal number of homes served.					
Program Stats					
Total Program Cost	\$	4,844,689.05			
Total Program Savings (MTCO)		1,879.21			
Total Package \$/MTCO	\$	2,578.05			
Average per home cost	\$	1,937.88			
Average per home MTCO reduction		0.75			

LIWP Bid Calculator

- Example Basic & Enhanced Measure Inputs

Measure	Average Qty Installed per Home	Unit	% of homes	# of homes	per Unit Cost	Total Measure Cost	\$/Metric Ton CO
HOT WATER FLOW RESTRICTOR, FAUCET RESTRICTOR	3.0	per restrictor	80%	2000	\$ 5.00	\$ 30,000.00	\$ 941.62

- Example Audited Measure Inputs

Measure	Average Qty Installed per Home	# of homes	Average kWh Savings per Home	Average Therm Savings per Home	Average Cost per Home	Total Measure Cost	\$/Metric Ton CO	Notes
CEILING INSULATION, R0-R30	1300.0	15	1300	150	\$ 1,560.00	\$ 23,400.00	\$ 1,310.48	per sqft

LIWP Bid Calculator

- Example Solar Water Heater

Measure	% of homes	# of homes	Total Installed Cost	Average CSI Thermal Rebate	Average LIWP Cost	Total Measure Cost	\$/Metric Ton CO
Solar Water Heating, AET 65 sq.ft.	5%	125	\$ 6,500.00	\$ 3,000.00	\$ 3,500.00	\$ 437,500.00	\$ 4,423.72

- Example Solar PV

Measure	% of homes	Average Cost per Watt	Average System Size (W)	Average kWh Savings per Home	Average Cost per Home	Total Measure Cost	\$/Metric Ton CO
SOLAR PV	5%	\$ 3.00	3000	4350	\$ 9,000.00	\$ 1,125,000.00	\$ 6,828.27

Energy Audits

- CSD is in the process of procuring a standardized energy audit tool for use in LIWP
- From list of Energy Upgrade California (EUC) approved energy auditing tools
- CSD's Priority – Simple / Easy to learn and use
- Example Measures to be audited:
 - Ceiling Insulation
 - Floor Insulation
 - Central Cooling Replacement (FAU Only)
 - Central Heating Replacement (FAU Only)
 - Water Heaters
 - Window Replacement

Q&A



Solar Water Heating

- SWH systems have been previously procured. All LIWP installations will use one of two Alternate Energy Technologies (AET) drainback systems:
 - A 41 sqft system with a 60 gal SWH tank (AET-DBS-G2-60-40)
 - A 64 sqft system with an 80 gal SWH tank (AET-DBS-G2-80-64)
- Only applies to gas-displacing water heaters in IOU territory
- Must apply for a California Solar Initiative (CSI) Thermal rebate
- Follow all CSI rules regarding licensing, etc.
- Total project cost cannot exceed contractor's pre-established cost + CSI rebate.

Solar PV

- Solar PV installed on single-family, owner-occupied homes only
- Must income qualify
- Systems will be sized between 50% and 80% of annual electric usage, based on bill analysis.
- System sizing must consider weatherization measures being installed.
- CSD will set a minimum Design Factor, likely around 90%
- PV modules and inverters must be listed on the California Energy Commission's Eligible Equipment List
- Contractors seek out and apply for any available PV rebates.

Solar PV

- Owner retains RECs
- Follow CSI PV guidelines (refer to current CSI Handbook):
 - System selection
 - Modules and Inverters must be listed on CEC Eligible Equipment List
 - Metering not required
 - System sizing
 - No larger than 5.75 kW DC-STC (5kW CEC-AC)
 - Based on 1-year's previous electric bills
 - When bills not available, use 2 watts per square foot

Quality
Assurance



Quality Assurance

The RA is responsible for providing a written QA Plan that includes:

- Program and Standards Compliance
- Subcontractor Monitoring
- Quality of Work
- Post-Inspections

Product & Service Warranty

- Workmanship Warranty – 1 Year
- Product Warranty – 1 year or default to manufacturers warranty if longer

Quality
Assurance



Quality Assurance

RAs are responsible for post-inspection.

- RAs must develop a process whereby all installed measures are post-inspected.
- CSD will perform third-party post-inspections on a percentage of households. The purpose is to determine proper installation, and to ensure that all feasible measures were installed.

Q&A



Workforce
Development



Workforce Development

The Regional Administrator is responsible for finding, creating and reporting jobs for unemployed and underemployed individuals in DACs.

Workforce
Development



Workforce Development

CSD is committed to create jobs within disadvantaged communities (DACs) to spur economic development and self-sufficiency.

Program Elements:

1. Tracking and Reporting Data
2. Wage Standard
3. Partnerships to Promote Employment of DAC Residents

Workforce
Development



Tracking and Reporting

- CSD's goal is to have a better understanding of LIWP's workforce – while minimizing administrative work for contractors.
- Collecting data on hours, wages and composition of the workforce enables the measurement of the co-benefits of public sector investment in energy efficiency in disadvantaged communities.
- The LIWP program will collect data through a simple Excel Worksheet to be completed monthly. 

Workforce
Development



Wage Standard

- A wage standard for LIWP program will serve CSD's mission of helping low-income families achieve and maintain self sufficiency.
- Wage standard varies from region to region, based on minimum wage as adopted in each County.

Workforce
Development



Wage Standards

REGION 1	2017	2018
Butte, Sacramento, Solano, Tehama, Yuba, Yolo	\$10.50	\$11.00

REGION 2	2017	2018
Contra Costa	\$12.30	\$13.00
Alameda, San Francisco	\$14.00	\$15.00
San Mateo	\$12.00	\$13.50
Santa Clara	\$13.00	\$15.00
Santa Cruz, Monterey	\$10.50	\$11.00

Workforce
Development



Wage Standards

REGION 3	2017	2018
San Joaquin, Stanislaus, Merced, Madera, Fresno, Kings, Tulare, Kern	\$10.50	\$11.00

REGION 4	2017	2018
Santa Barbara, Ventura	\$10.50	\$11.00
Los Angeles	\$12.00	\$13.25

REGION 5	2017	2018
Imperial, Orange County, Riverside, San Bernardino	\$10.50	\$11.00
San Diego	\$11.50	\$11.50

Workforce
Development



Partnerships

CSD encourages bidders to incorporate elements of other successful workforce partnerships.

- These include working with credible workforce development organizations with deep ties to the community that can provide the following:
 - Recruit and screen potential candidates;
 - Provide job readiness skills training;
 - Provide ongoing case management services for disadvantaged workers.

Workforce
Development



Partnerships

Regional Administrators should reach out to qualified workforce training providers to provide workforce development services in advance of the RFP due date.

- Workforce Development Boards
- Community Colleges
- Non-profit training providers
- Community based organizations
- Other qualified providers, as identified by Contractor.

Workforce
Development



Partnerships

What do partnerships look like?

- Partnering with community based organizations to disseminate information on upcoming job opportunities, in order to hire residents from DACs;
- Enter into a first source hiring agreement with a local workforce development provider, and commit to consider in good faith, any qualified individual referred to the contractor;
 - For any hired candidate, the workforce development provider will provide ongoing case management services.
- Enter into a partnership with a local community college or training provider to hire qualified graduates of a weatherization training program.

Workforce
Development



Partnerships

To facilitate workforce development partnership goals, CSD would like to gauge interest in a “Building Partnerships” event. 💡

This event would bring together workforce organizations with potential Regional Administrators.

- Webinar versus in-person meeting?
- Soliciting questions in advance of meeting

Q&A



Economic
Development



Economic Development

The Regional Administrator is responsible for:

- Encouraging spending / investment within DACs
- Tracking cost of weatherization supplies purchased in DACs
- Tracking & reporting payments made to contractors located in DACs

Reporting



Reporting

The Regional Administrator will be responsible for reporting the following, monthly, to CSD:

- Progress towards deliverables
- Project details 
- Workforce development data 
- Economic development data 
- Expenditures

Reporting



Project Details & Expenditures

- RAs will gather and maintain detailed information for each Dwelling Served:
- Two main reports will be collected by CSD:
 1. Expenditure Reports - for invoicing:
 - Administrative
 - Indirect Costs
 - Program Management
 - Direct
 - Marketing & Outreach
 - Direct Program Services / Installation
 2. Detailed Project Reports – to CSD’s Weatherization Database
- At contract start interim reporting will allow RA’s to use their own data system or a reporting tool to be provided by CSD.
- Mid 2017 CSD will provide a front end information management system that will allow RA’s to maintain project information and comply with CSD reporting requirements.

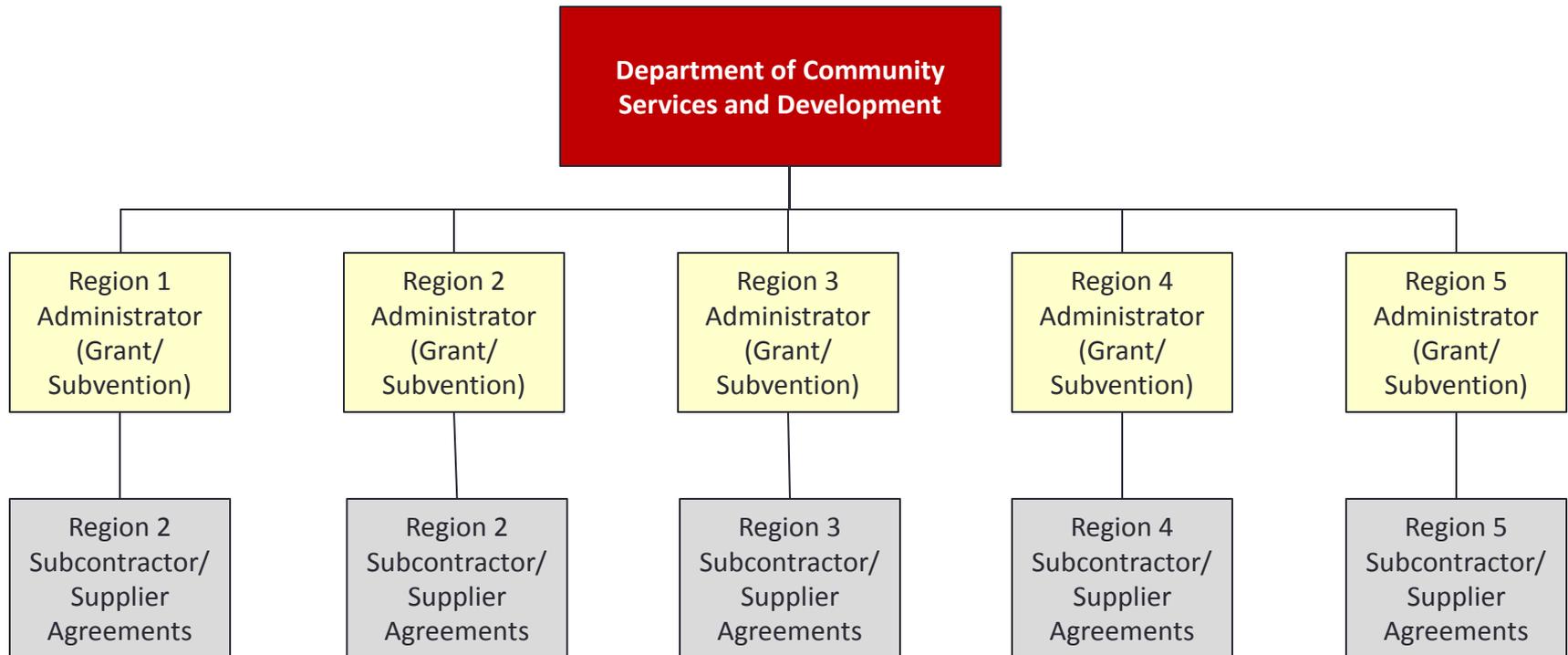
Q&A



BID PROCESS

Procurement Model

FOR DISCUSSION



Minimum Qualifications / Experience

Regional Administrator and their team shall have:

- Demonstrated knowledge and ability to manage a regional program
- Minimum of three (3) years experience administering and performing residential housing improvement – major focus on weatherization and solar renewables
- Maintain a Class B - General Contractor License
- Specific licensing by trade will be required for RA team (Ex: HVAC, Electrical, Solar, Plumbing, etc.)
- Must be in good standing with appropriate state and local licensing authorities

Workplan Requirements

- **RAs will need to provide narrative to speak to:**
 - Admin Needs
 - Program Management - Oversight
 - Marketing & Outreach
 - Budget
 - Service Delivery
 - Expected Outcomes (GHG reduced, jobs created)
 - Monitoring contract benchmarks
- **General Timeline:**
 - February 2017 Contract Start
 - 14 – 15 month contract period
 - Ramp-up and initial service delivery to start 30 – 45 days
 - Benchmark – 40% of Direct Program Expenditures by September 2017 (7 month mark)

Budget Items

Bidders will be required to submit budgets for the following:

- Administration
 - Indirect (costs necessary to administer the program, such as workers' comp, facilities, utilities, phones, etc.)
 - Program Management (positions supporting direct program services)
- Direct
 - Marketing and Outreach
 - Direct Program Services / Installation

Solicitation Scoring Criteria

Scoring Element	Description	Scoring
Team Qualifications	<ul style="list-style-type: none"> ▪ Proposed team composition ▪ Experience and demonstrated record of success of bidding team in providing similar services within the region 	25%
Approach & Workplan	<ul style="list-style-type: none"> ▪ Detailed approach, tasks and activities for program support and marketing activities ▪ Resource allocation by task and activity to accomplish tasks ▪ Detailed schedule of tasks and activities ▪ Bidder defined deliverables 	25%
Program Performance	<ul style="list-style-type: none"> ▪ Detailed explanation of why results are likely and statement of risks that may impact performance ▪ Expected total GHG reductions ▪ Expected GHG reduction/household ▪ Expected total jobs in disadvantaged communities 	20%
Cost	<ul style="list-style-type: none"> ▪ Administrative costs ▪ Program support and marketing costs (based on bidder defined deliverables) ▪ Cost of installing measures 	30%

Solicitation schedule

Key Activity	Date
Draft solicitation release date	10/21/2016
Deadline for comments for draft solicitation	10/28/2016
Solicitation release date	11/04/2016
Bidder's conference	11/10/2016
Written questions and change request submittal deadline	11/14/2016
Questions and answers posted	11/21/2016
Final date for application submission	12/2/2016
Intent to award posted	12/23/2016
Proposed award date	12/30/2016

Q&A



WRAP UP

Final remarks, highlights from today's meeting and additional time for discussion.

Thank You.

If you have additional questions or ideas after this meeting, or if you'd like to submit information to CSD to consider, please email:

Crystal.alvarez@csd.ca.gov

