



Department of Community Services & Development

*Low-Income Weatherization Program
Farmworker Housing Component
Stakeholder Workshop*

October 24, 2018



Purpose

- ❖ Assist the proposed program design, development and implementation
- ❖ Networking opportunity for interested parties
- ❖ Help architect the draft procurement
- ❖ Identify technical assistance needs



Workshop Overview

- Welcome and Introductions
- Purpose
- Program Objectives
- Procurement Process and Timeline
- Program Funding and Target Service Area
- Key Principles
- Request for Proposal Scoring Elements
- Technical Assistance Survey



Department Overview

CSD partners with a network of private non-profit and local government organizations to support the local administration of programs designed to reduce poverty by:

- ❖ Providing services to assist low-income individuals and families to achieve and maintain self-sufficiency.
- ❖ Helping families meet their home energy needs and reduce their utility costs through energy efficiency upgrades and access to clean renewable energy.

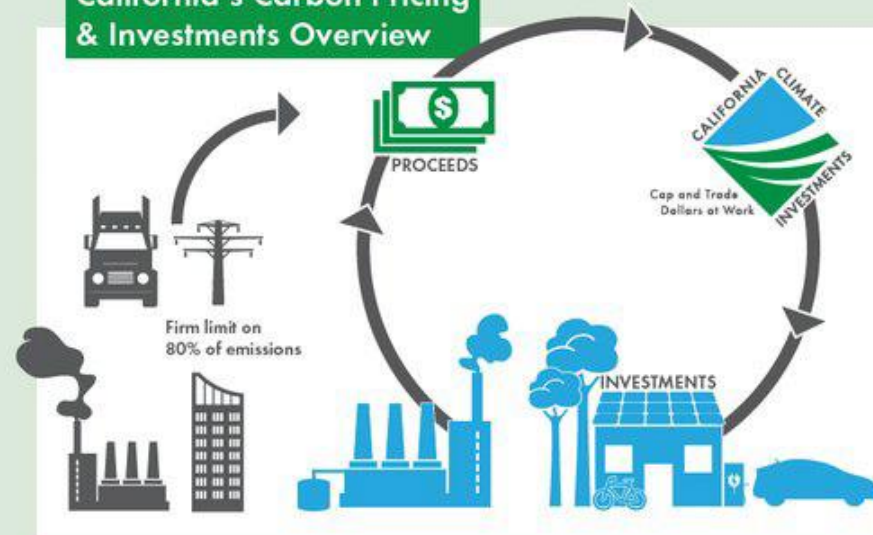
What are California Climate Investments?

California Climate Investments is a statewide initiative that puts billions of Cap-and-Trade dollars to work reducing greenhouse gas emissions, strengthening the economy and improving public health and the environment—particularly in disadvantaged communities (DACs).



Cap-and-Trade Proceeds Continue to Benefit California

California's Carbon Pricing & Investments Overview



Cumulative Funding Summary





Program Objectives and Implementation

- ❖ The Farmworker Program component under LIWP seeks to provide no-cost solar systems and energy efficiency upgrades in eligible dwellings owned or occupied by farmworker families to reduce GHG emissions and lower energy costs for low-income farmworker families.
 - ❖ CSD envisions this program to be conducted in coordination with other assistance programs and resources to enhance economic, health and social impacts of LIWP service offerings, and achieve efficiencies in program administration.
 - ❖ Focused approach to support accelerated program implementation.



Stakeholder Engagement

- ❖ March 27, 2018 – Request for Information (RFI) inviting stakeholders to contribute information to assist the development of the FW program component
- ❖ June 29th – Fresno Public Workshop: Single-Family Farmworker Energy Efficiency and Solar Photovoltaic Program Design Presentation
- ❖ July 16th - Sacramento Public Workshop: Single-Family Farmworker Energy Efficiency and Solar Photovoltaic Program Design Presentation
- ❖ July 16th – Public Hearing LIWP Draft Program Guidelines – Farmworker Housing Component
- ❖ October 24th and 25th – Fresno and Bakersfield Workshops: Farmworker Housing Component program design and technical assistance assessment

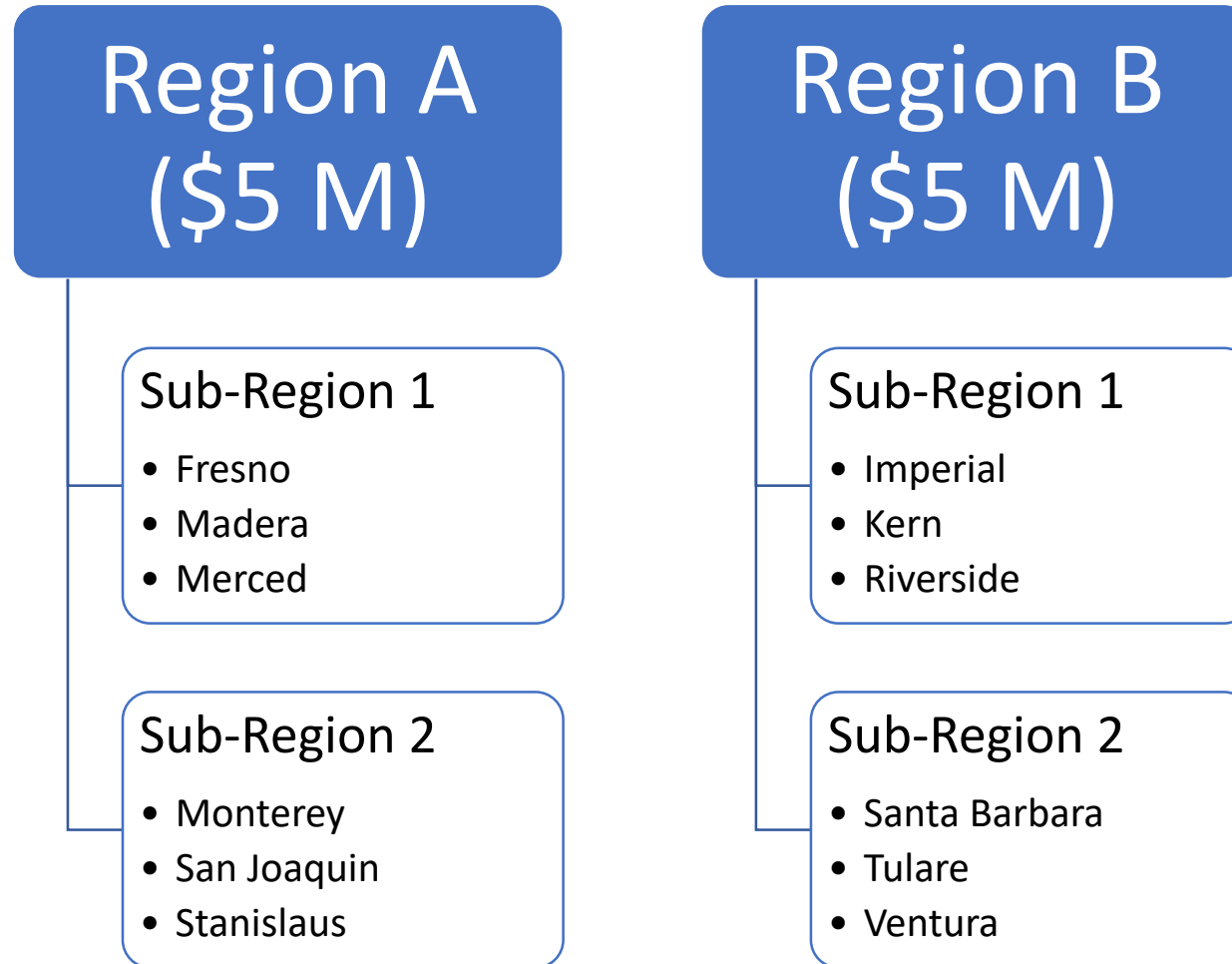
Program Timeline



Activity	Projected Date
Draft RFP Released * Proposal Technical Assistance Webinar	Mid-November
Official RFP Released	Mid-December
Bidder's Conference	TBD
Proposal Due	February 2019
Selection and Award	March 2019



Program Funding and Target Service Areas



Key Program Requirements



Funding and Services Area Considerations

- ❖ Program administration and support expenditures are capped at 20%
- ❖ Balance of Funds: Direct program expenditures split evenly by sub-region
 - ❖ Specific Allocations for Energy Efficiency and Solar
- ❖ AB 1550 requires the California Climate Investment Plan to reflect specific funding allocations to support projects/services within and benefiting individuals living in disadvantaged communities, low-income households living anywhere in the region, and low-income households within a ½ mile of designated disadvantaged community. Expenditure target estimates are summarized below:

Service Region	DAC	Low-Income HHs within ½ mile of DAC	Low-Income HHs anywhere within the region	Totals
A	\$1.8 M	\$.5 M	\$2.7 M	\$5 M
B	\$1.8 M	\$.5 M	\$2.7 M	\$5 M





Request for Proposal

- ❖ CSD will administer a Request for Proposal (RFP) to identify suitable and qualified Farmworker Housing Administrators – one for each designated service region.
 - ❖ Limited to private, non-profit or public organizations possessing experience administering and providing supportive services to low-income, farmworker communities.
- ❖ In accordance with SB 89, CSD must:
 - ❖ Give weight and priority to applicants that can demonstrate that they have existing ties to the local communities they would be servicing, among the other factors considered. This shall apply to both regional administrators and direct service providers.
 - ❖ Give preference to organizations with demonstrated performance and outcomes related to low-income energy efficiency and renewable energy services.
- ❖ Selected Administrators will be awarded one award of \$5M to oversee the administration of services to one service region through June 2020.

Request for Proposal Scoring Elements



Project Team – 50 Points

- Prime Proposer
- Team Members

Regional Needs – 10 Points

Community Engagement – 10 Points

Marketing and Outreach Plan – 20 Points

Workplan and Timeline – 50 Points

- Ramp Up
- Service Delivery Plan
- Quality Assurance
- Timeline

Burdens and Co-Benefits – 20 Points

Bid Sheet and Budget – 40 Points

- GHG Outcomes – Energy Efficiency
 - GHG Outcomes – Solar PV
- Budget Proposal and Narrative



Request for Proposal Scoring Elements

Project Team – 50 Points

- ❖ Prime Proposer and Team Members
 - ❖ History of serving farmworkers and low-income individuals and families
 - ❖ Demonstrate existing ties to farmworker communities in each region and proposed target area to be served
 - ❖ Collectively demonstrated performance and outcomes related to low-income energy efficiency and renewable energy services.
 - ❖ Experience managing similar scale programs and the ability to manage multilayered teams and scopes (Prime Proposer only)



Request for Proposal Scoring Elements

Regional Needs – 10 Points

- ❖ Narrative detailing the specific needs of the region, sub-region
- ❖ Understanding of farmworker household needs
 - ❖ Linguistic, cultural, socio-economic and other supportive needs
 - ❖ Understanding of the unique energy efficiency and renewable energy needs
 - ❖ Understanding the housing characteristic of farmworkers
 - ❖ Home energy need and financial energy burden of farmworker households
- ❖ Household income meets 80% of statewide median income or 80% of area of median income (HCD State Income Limits)
- ❖ Eligible dwellings
 - ❖ Include a household member employed as a farmworker within the twelve months of application for assistance. Located in a disadvantaged community and/or low-income community in the 12-county region
 - ❖ A single-family home (including mobile or manufactured home) or stand-alone building of 2-4 units



Request for Proposal Scoring Elements

Community Engagement Plan – 10 Points

- ❖ Describe methods that have and will be used to engage residents and key stakeholders during project design, development and implementation. The Proposer's Community Engagement Plan must also detail specific engagement strategies in disadvantaged communities and communities within a ½ mile radius of disadvantaged community, that are to be targeted
- ❖ Community Partner and Resident Stakeholder Engagement Strategies, examples:
 - ❖ Create a Steering Committee comprised of residents and community partners
 - ❖ Create a venue/mode to inform program design
 - ❖ Conduct workshops, roundtables and focus groups to inform, educate and learn from Stakeholders



Request for Proposal Scoring Elements

Marketing and Outreach Plan – 20 Points

- ❖ Narrative on the marketing of the services to potentially eligible farmworker households
- ❖ Measurement of capacity to conduct marketing and outreach
- ❖ Demonstration of efficacy of similar efforts targeting eligible farmworker households



Request for Proposal Scoring Elements

Workplan and Workplan Timeline – 50 Points

- ❖ Detailed account of proposed service delivery
 - ❖ Ramp-up activities needed to administratively, fiscally and technically to prepare for program implementation
 - ❖ Provides a in-depth description of:
 - ❖ Tasks to be completed, including timelines
 - ❖ Integration of energy efficiency measure with solar measures
 - ❖ Project oversight and coordination of subcontractors
 - ❖ Streamlined service delivery to minimize resident impacts
 - ❖ Customer education (energy and other services)
 - ❖ Anticipated barriers and strategies to overcome
 - ❖ How the program delivery will address the needs within the proposed target service area





Request for Proposal Scoring Elements

Workplan and Workplan Timeline – cont.

- ❖ Quality Assurance plan detailing how proposers will ensure appropriate oversight of procurements, inspections, workmanship/service delivery and customer satisfaction
- ❖ Program Close Out plan describing compliance with reporting requirements both fiscally and programmatically
- ❖ Workplan Timeline will address Project Team's capacity and ability to deliver services, meet expenditure benchmarks, adhere to program requirements, and provide workforce development services, etc.



Request for Proposal Scoring Elements

Burden and Co-Benefits – 20 Points

- ❖ Narrative describing any economic, environmental or public health burdens potentially mitigated in disadvantaged and low-income communities as a result of project activities
- ❖ Description of co-benefits resulting from proposed project activities
 - ❖ Leveraging creating enhanced offerings, offset costs of providing energy services
 - ❖ Household energy savings
 - ❖ Job creation and training
 - ❖ Household and community health benefits
 - ❖ Other community economic benefits
 - ❖ www.arb.ca.gov/cci-cobenefits

Request for Proposal Scoring Elements

Bid Sheet and Budget – 40 Points

- ❖ Provides context to the costs associated with the proposed activities:
 - ❖ Entries Required:
 - ❖ Cost per measure
 - ❖ Administrative and program costs
 - ❖ Displays:
 - ❖ Estimated Frequency of measure installation for:
 - ❖ Energy Efficiency Measures
 - ❖ Non-Energy Efficiency Measures
 - ❖ Solar Photovoltaic
 - ❖ Estimated Number of households to be served
 - ❖ Estimated Greenhouse Gas emission reductions





Request for Proposal Scoring Elements

Bid Sheet and Budget – LIWP Services

- ❖ The suite of LIWP measures include the following categories:
 - ❖ Energy Efficiency Measures
 - ❖ Solar PV Measures
 - ❖ Non-Energy Efficiency Measures
 - ❖ Health & Safety considerations
 - ❖ Home assessment / diagnostics
 - ❖ Limited home repair (to support installation of EE and Solar PV systems)

- ❖ The type and number of installed measures will vary by property and feasibility decided by several factors, for example:
 - ❖ Some measures require combustion appliance testing and/or must be assessed for feasibility through an energy audit or solar assessment
 - ❖ Solar PV and fuel switching is limited to low-income homeowners
 - ❖ Some measures have specific application to dwelling type including mobile homes, single family, and buildings of 2-4 units

Request for Proposal Scoring Elements



Bid Sheet and Budget – Solar PV Measure

- ❖ 50% of Direct Budget shall be allocated to Solar PV installations.
 - ❖ Solely designated for the installation of Solar Photovoltaics (PV).
- ❖ Requires owner occupancy and have energy efficiency measures installed.
- ❖ Assessments are required to be entered into the PV Watts calculator separate from the SnuggPro Audit tool.
- ❖ Install this measure when:
 - ❖ The home has adequate roof space
 - ❖ System is justified with a SIR of 1.0
 - ❖ System size will not exceed 5.75DC/5-AC

Request for Proposal Scoring Elements

Bid Sheet and Budget – Energy Efficiency Measures



- ❖ 50% of Direct Budget shall be allocated to Energy Efficiency Installations.
- ❖ Energy Efficiency Measure: All energy efficient measures that have associated GHG savings.

These include:

- ❖ Non-Audited Measures including but not limited to:
 - ❖ Lighting, DHW restrictors, Infiltration, Insulation (when R-0), Specific Appliances and Equipment, Cool Roofs, HVAC Service and Upgrade.
- ❖ Audited Measures including but not limited to:
 - ❖ HVAC, DWH, Solar WH, Insulation (greater than R-0), Refrigerators, Freezers, Ductwork Repair and Upgrade.
- ❖ Fuel Switching Measures included but not limited to:
 - ❖ Heating Appliance, Clothes Dryer, Cooktop, Oven, Range.

Request for Proposal Scoring Elements

Bid Sheet and Budget – Non-Energy Efficiency Measures

- ❖ 20% of Direct EE Budget maximum and > 50% per dwelling for Non-EE Measures.
- ❖ Do not contain GHG savings and which include:
 - ❖ Health and Safety Measures including but not limited to:
 - ❖ Appliance Repair, Appliance Replacement (Appliances that did not meet audit requirements per H&S Policy), Co & Smokes.
 - ❖ Assessments & Diagnostic Measures which include:
 - ❖ Whole House Assessments (audited & non-audited), CAS Testing, Duct and HERS Testing.
 - ❖ Limited Home Repairs which include, but are not limited to:
 - ❖ Attic/Floor Ventilation, Minor Roof Repair, and Water Heater Platform Repair.





Request for Proposal		
<i>Bid Sheet and Budget</i>		
Measure	Unit	per Unit LIWP Cost
COMBUSTION APPLIANCE TESTING	per home	\$ -
DUCT TESTING (PRE AND POST)	per home	\$ -
HERS TESTING	per home	\$ -
WHOLE HOUSE ASSESSMENT WITH ENERGY AUDIT	per assessment	\$ -
WHOLE HOUSE ASSESSMENT WITHOUT ENERGY AUDIT	per assessment	\$ -
CEILING INSULATION, ADD R-11	per sqft	\$ -
CEILING INSULATION, ADD R-19	per sqft	\$ -
CEILING INSULATION, ADD R-30	per sqft	\$ -
CEILING INSULATION, R-30	per sqft	\$ -
CEILING INSULATION, R-38	per sqft	\$ -
COOL ROOFS - MEMBRANE	per sqft	\$ -
FLOOR INSULATION, R0-R19	per sqft	\$ -
RADIANT BARRIERS	per sqft	\$ -
WALL INSULATION, STUCCO AND WOOD, R0-R13	per sqft	\$ -
CAULKING	per ln ft	\$ -
CHIMNEY DAMPERS	per damper	\$ -
COOL ROOFS - ROLL-ON APPLICATION	per sqft	\$ -
COVER PLATE GASKETS	per household	\$ -
ENVELOPE REPAIR (MAJOR)	per household	\$ -
ENVELOPE REPAIR (MINOR)	per household	\$ -
FIREPLACE GLASS DOORS	per each	\$ -
GLASS REPLACEMENT	per sq ft	\$ -
KITCHEN EXHAUST DAMPERS	per damper	\$ -
VENT COVERS INTERIOR	per vent cover	\$ -
WEATHERSTRIPPING, HINGED EXTERIOR DOOR	per door	\$ -
WEATHERSTRIPPING, OTHER	per ln ft	\$ -
WINDOW REPAIR (5 Windows Maximum)	per window	\$ -
WINDOW REPLACEMENT	per sqft	\$ -
ATTIC/CRAWL SPACE COVER REPLACEMENT	per cover	\$ -



Request for Proposal Scoring Elements



Bid Sheet and Budget – Budget Summary

- ❖ Average Home Cost
 - ❖ Identifies Total Average Per Home Cost and Projected Homes for EE, Solar PV, and Non-EE Measures based on Proposer Costs and applied assumptions for measure frequencies in Target Area
- ❖ Historic LIWP Savings
 - ❖ Provides Average EE and MTCO₂/dwelling for EE and PV and estimated EE and PV savings/dwelling based on Proposer Cost and applied assumptions for measure frequencies in Target Area
- ❖ Savings Summary and Score Allocation
 - ❖ Provides Annual Energy Savings and Annual GHG Savings for EE, Solar PV, and Non-EE Measures based on Proposer Cost and applied assumptions for measure frequencies in Target Area

Request for Proposal Scoring Elements



Bid Sheet and Budget – Budget Summary

- ❖ Identifies Total Award Amount with the following Categories for Budget Allocations:
 - ❖ Proposers Program Administrative Cost (Cost Cap of 20% of Award)
 - ❖ Direct Program Expenditures
 - ❖ Solar PV Allocation (50% of Direct Program Excluding Program Admin.)
 - ❖ EE Allocation (50% of Direct Program Excluding Non-EE Allocation)
- ❖ Bid Sheet and Budget feed into the contract and create the basis for reimbursement rates

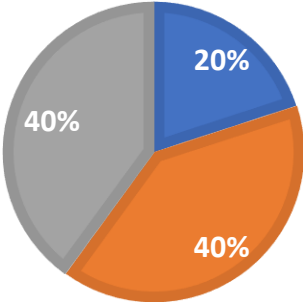
Request for Proposal Scoring Elements

Bid Sheet and Budget



BUDGET

■ Program Administration ■ Solar PV ■ Energy Efficiency



Total Budget	\$5,000,000
Program Administration and Support	\$1,000,000
Solar PV	\$2,000,000
Energy Efficiency*	\$2,000,000

Note: The Energy Efficiency allocation includes up to 20% for non-Energy Efficiency measures.





Official Request for Proposal

- ❖ Program guidelines and procurement process will be defined in RFP
- ❖ The process to submit proposals will be described in the RFP
 - ❖ Ideal proposals display dedication, forethought, preparedness, and reflect the organization
 - ❖ Evaluation criteria will be described in the RFP
 - ❖ CSD will carefully review all allowed proposal, note any deviations from the RFP requirements, and evaluate and score the proposals
 - ❖ CSD may reject any proposal that it deems nonresponsive or conditional





Draft Request for Proposal

- ❖ Distribution via CSD public website – Sign up!
 - ❖ Proposal Technical Assistance Webinars
- ❖ Purpose:
 - ❖ Form more effective service partnerships
 - ❖ Improve contractor outreach to farmworker housing owners
 - ❖ Other improvements



Technical Assistance

- ❖ Goal – Assist bidders in submitting a responsive bid
- ❖ Technical Assistance can take many forms and CSD will be surveying bidders' needs
- ❖ Assistance to be provided by Mission Consulting, independent from CSD



Next Steps

- ❖ Proposal Technical Assistance Follow-Up Survey
 - ❖ www.surveymonkey.com/r/FarmworkerFollowUp
 - ❖ Survey closes: November 2nd
- ❖ Farmworker Housing Component Program Detail Webinar
 - ❖ LIWP Energy Efficiency and Solar PV Assessments and Energy Audits
 - ❖ Diagnostics, Home Repair, and Health and Safety Requirements
 - ❖ Bid Sheet Tool
- ❖ Draft Request for Proposal with Comment Period
 - ❖ Estimated Release: Mid-November
- ❖ Farmworker Housing Administrator Matchmaking
 - ❖ <https://tinyurl.com/LIWPFarmworker>
- ❖ Bidder's Conference
- ❖ Proposal Technical Assistance Opportunities



CSD Resources

Email: LIWP@csd.ca.gov

Website: www.csd.ca.gov/liwp - Subscribe to our LIWP e-mail list

Facebook: www.facebook.com/CaliforniaDepartmentOfCommunityServicesDevelopment

Twitter: https://twitter.com/ca_csd

