

## Multi-Family RFP Questions

1. During the 6 month period of the contract how many training events do you expect for each Class listed in the RFP? .. example, each class listed would be held monthly?

Each listed is a suggested timeframe of training and an estimated number of students that would take this class. It is expected that in your proposal you would size the class accordingly to create an optimal learning environment. The classes would be held as many times as necessary.

Class Name	Training Days	Number of Students
Boiler Testing & Troubleshooting	1	10
Multi-Family Energy Audits/Weatherization Assessments	2	5
Multi-Family Weatherization Techniques	3-4	25

2. How many total participants do you expect to attend the training classes during the 6 month period?

The number of students expected is listed above.

3. In the development of the training curriculum, do you expect the Training Contractor to produce, deliver and pay for finished product?

Yes, this cost should be in your budget.

4. We would like to ask a question concerning the RFP. The RFP mentions that the "Multi-Family Training Contractor will conduct final inspections on three multi-family projects." Would it be possible to know the estimated size of these multi-family projects in order to provide "the estimated number of hours" for the task. Thank you.

Georgia has limited our multi-family program to buildings 3 stories or less with 25 units or less in the apartment community. Therefore we estimate the communities will be between 50 – 200 units total.

Also, the RFP mentioned that the questions and answers would be posted on September 1, 2010. When this is available, will it be on the page of your site where the RFP is located?

Yes.

5. Is it advised or must the Multi-Family Training Contractor have business presence (i.e. administrative office, training facility, accompanying equipment and supplies) within proximity of intended training sites and/or Atlanta state headquarters for logistical considerations?

The training contractor does not have to have an office in Atlanta. The trainings will take place on site at the apartment communities. You must, however, provide all needed training equipment.

6. Have the necessary training sites been determined? If so, what are their location(s)?

The training sites have not yet been determined.

7. The RFP's "Scope of Services" states, "...The Multi-Family Training Contractor will develop the training curriculum and schedule trainings of service provider staff and contractors, referencing the GEFA weatherization training manual. A complete description of the new multi-family program is attached in Exhibit A...." How might the said new multi-family program description and the "GEFA weatherization training manual" be accessed for reference? Could not find them in posted solicitation documentation.

Draft of the manual is attached for the purposes of this RFP

8. Is it correct, as is noted in the RFP, that if proposal submittal deadline is September 8th, proposal review is not beyond 20 days from submittal deadline, award notification being September 24th, and notification in writing of unsuccessful proposals within 10 business days following proposal review (@ October 8th) would it be a good approximation to plan on a October 15th contract execution date, such that there are approximately 5.5. months to complete proposed project tasks; hence, @ October 15, 2010 to March 31, 2011 for an initial contract period? Is this a good approximation on a contract start date? If not, what is a better approximate contract start date to plan on?

October 1 – 15, 2010 is a good approximation range for the contract to begin.

9. What are the budget limits and/or guidelines within which to budget revenues and expenses of the respondent's submitted proposal?

There are no budget limitations.

10. What was the awarded contract dollar amount in the previous fiscal year (SFY 2009-2010) for Multi-Family Training contractor services or for similar expenditure?

This is first time Georgia is embarking on Multi-Family training. GEFA does contract with a third party to perform training for Weatherization Service Providers for the American Recovery and Reinvestment Act. The dollar amount for the initial contract was \$769,945 to teach New Crew Basics, Whole House Weatherization, Lead Safe Work Practices, Basics of Weatherization Assessment, Basics of Heat Transfer, Air Sealing, Insulation, Pressure Diagnostics, Weatherization Health & Safety and Mobile Home Weatherization.

7) Is the selected Multi-Family Training Contractor expected to work on-site daily during the contract period located at the Georgia Environmental Finance Authority in Atlanta, GA?

No, GEFA will not provide office space for the training contractor.

8) Given the initial, approximate 5-month project period, how much time will GEFA permit for curriculum development and grantee/provider training?

Weatherization Assessment/Energy Audit training needs to commence in October 2010. It is expected that the Training Contractor has experience in this field already and will have a quick start to this program.

9) Is it anticipated that training will be conducted at strategic sites throughout the state, on site at grantee location, or at a single site over a series of consecutive day overnight stays?

It is anticipated that training will happen in an urban area of the state and a rural area of the state. It is anticipated that the training will happen as the actual projects progress. Overnight stay is likely when the training happens, but the training will not take place all at one time.

10) What previously has been the contractor's staffing size/ personnel team for Multi-Family Weatherization Assistance Training, 3-member, 4-member or 5-member size?

We have not had a Multi-Family Training Contractor prior to this RFP. Our third party training contractor employs between an estimated 2 – 8 people at any given time.

11) May I submit compliant proposal as a sole proprietor consultant interest (i.e. J. B. Johnson & Associates) for this solicitation? If so, as a sole proprietor respondent, will I receive an IRS Form 1099 at the end of the calendar year for revenues paid?

Yes, to both questions.

## **Weatherization of Rental Units**

Within the constraints of the program, a sub-grantee shall provide services to buildings that have rental dwelling units occupied by eligible program participants or units that are expected to be occupied by eligible program participants within 180 days of completion of the weatherization work. A sub-grantee shall weatherize the entire multi-family building when the building is eligible.

## **Energy Audits/Weatherization Assessments**

Rental buildings should be treated the same as owner-occupied buildings in determining appropriate measures to be performed.

## **Energy Audits/Weatherization Assessment for Multi-Family Buildings**

Multi-Family buildings with 5 – 25 units per building and 3 stories or less are eligible to receive weatherization services in Georgia. These building require an energy audit as follows:

## **Georgia Multifamily Weatherization Priority List**

### **PRE-PRIORITY**

A Pre-Priority list has been compiled that identifies general waste heat measures that should be installed in all multifamily units once they enter the Weatherization Assistance Program.

- Replace all incandescent light bulbs with compact fluorescent light bulb
- Insulate water heater tank (Omit if DHW is inside building envelope)
- Insulate water heater pipes (Omit if DHW is inside building envelope)
- Install aerators on faucets (flow restrictors less than 0.5 gpm)
- Install low-flow showerheads (replace with fixture that has less than 2.5 gpm)
- Replace furnace filters

### **ENERGY MEASURE PRIORITY LIST**

The following weatherization energy measures should be installed as conditions dictate and funding allows. The top four priorities – air sealing, attic insulation, dense-pack sidewall insulation, and duct sealing – should be installed as a package.

#### **1) Air Sealing**

Identified as the top weatherization priority, air sealing measures should follow prescriptive and performance goals. A blower door test should be used to identify air sealing needs, and sufficient ventilation should be added if necessary once air sealing measures have been completed. Existing attic insulation should be pulled back to inspect for air sealing opportunities. An “airtight by drywall” approach should be used, simply meaning that the drywall should be considered the primary air barrier. All penetrations in the drywall should be sealed on all surfaces (ceiling, exterior walls, etc.) Particular attention should be focused on the

combustion closet, ensuring plumbing, electrical, flue pipe, and duct penetrations are completely sealed at drywall.

**2) Attic Insulation (when applicable)**

Attic insulation installation should be done in conjunction with air sealing. Make sure that the attic insulation is brought to R-38 and that there is an even covering throughout the attic space. Existing insulation may be reused, with additional insulation applied directly on top to achieve desired R-Value. It is important to follow all necessary attic prep measures before adding attic insulation. If unit does not have an attic, this priority may be ignored; however air sealing must still be completed.

**3) Exterior Walls**

As with attic insulation, exterior wall insulation should also be done in conjunction with air sealing. Dense-pack insulation should be installed to wall cavities where insulation is not already present. If at least half of the wall cavities have no pre-existing insulation, then dense-pack insulation measures are warranted. Party walls do not need dense pack insulation unless unique situation exists (adjacent unit is permanently unoccupied and is not space heated/cooled).

**4) Seal and Insulate Ducts**

Sealing and insulating ducts has been identified as a new priority for weatherization measures in Georgia since ducts are a part of the building envelope and are an important factor in the energy use of the home.

Use a pressure pan test to identify where duct sealing is necessary. Sealing should be completed on all ducts, connections, and boots with mastic. Install insulation on ducts located outside of conditioned space with foil-faced duct insulation that has an R-value of R-8. Ducts that run through inside the building envelope should be sealed if easily accessible, such as in the combustion closet. If ductwork is in floor or ceiling joist cavities and not accessible, then this priority may be ignored.

**5) Refrigerator**

Estimate annual electricity consumption through metering. Replacement should occur if savings to investment ratio is great than 1. Cost of replacing a refrigerator must include delivery and installation of the new refrigerator, and removal and environmentally responsible de-manufacturing of the old unit.

**6) Heating and Cooling System**

Replace all heating systems that have a savings to investment ratio of greater than 1.0. Clean and tune all heating systems with less than a 1.0 SIR. Gas forced air systems must be an ENERGY STAR qualified product.

Clean and tune air conditioner systems between 10 and 13 SEER. Replace split system A/C <10

SEER with 14 SEER units. Replace rooftop/unitary A/C < 10 SEER with 14 SEER or 11.6 EER units.  
Replace PTAC (Packaged Terminal A/C) with EER < 9 with minimum 12 EER units.

**7) Water Heater**

Convert electric to gas where possible. Minimum requirement is .62

**8) Programmable Thermostat**

Install programmable thermostat when replacing thermostat.

**Multi-Unit Building Eligibility Requirements**

Eligibility requirements are as follows:

1. 66% or more (50% or more for duplexes and four-unit buildings) of the dwelling units in the building are occupied by eligible applicants; or
2. 66% or more of the dwelling units will be occupied by eligible households within 180 days under a Federal, State or local government program for rehabilitating the building or making similar improvements to the building.

If the entire building is not eligible for weatherization because there are not enough units occupied by eligible families, service to the entire building shall be denied.

**Owner Occupied Multi-Unit Buildings – Condominiums**

If each dwelling units in a multi-family building is separately owned and occupied by the owner, then each eligible dwelling unit shall be created as a separate single family building in Hancock Energy Software. Work on common area measures is allowed only when all dwelling units in such multi-family buildings are occupied by eligible households.

**Rental Units Containing Commercial Property**

If a building contains one or more dwelling units and is also used for commercial purposes, only the part of the building occupied by an eligible household may be weatherized. Grantees may not weatherize commercial property. Multi-family eligibility as described in 10 CFR Part 440.22 Eligible dwelling units applies to rental units containing commercial property, the commercial property cannot be counted as a unit when determining the number of units in the building.

Where a measure will need to be installed on both eligible dwelling unit and commercial area to be effective (i.e. insulating sidewalls with balloon framing) the sub-granted shall charge the portion associated with the eligible unit to the program and charge the portion associated with the commercial area to the property owner. The amount charged to the property owner may not be counted toward the owner contribution if an owner contribution is required under 10 CFR Part 440.22 (d). The property owner declines the measure or declines to pay the portion associated with the commercial area, the dwelling unit must be denied.

## **Policies and Procedures**

### **Rental Work Agreement**

Sub grantees must receive written permission from the owner (or authorized representative) to weatherize the building. Sub grantees are required to use the Georgia Weatherization Assistance Program Rental Work Agreement for each rental weatherization project. This agreement is used on single family, duplexes, 4 units and multi-family rental units. The document can be found on GEFA's website [www.gefa.org](http://www.gefa.org).

Agencies working on 1 -4 units rentals must follow these steps prior to performing weatherization work:

1. Notify the tenants of the Weatherization Program and the Health and Safety requirements (i.e. lead and mold information, and health and safety issues) as required.
2. Evidence that the owner understands they will not raise rent(s) for a period of two years because of the increased value of the dwelling unit(s) when the value is increased solely because of the weatherization work.
3. Tenants are notified that rent cannot be increased per item (2) above.
4. Tenants are informed of owner contributions in the form of rebates and rent reductions, where required.
5. Tenants are notified in writing of the formal complaint process (see section XX for this process)
6. Execute the Property Owner Agreement.

### **Owner Contribution**

In rental dwelling units where owners are responsible for paying heating costs, or multi-family units that are master-metered, owners may be required to make a contribution amounting up to 15% of the total cost of the weatherization work. If heating/cooling system replacements are involved, the landlord must contribute 25% of that cost. Where the tenant is responsible for paying heating costs the owners are required to make a contribution amounting to 10% of the total cost of the weatherization work.

An exception is made for owners who are themselves eligible for weatherization services because they are eligible for the Georgia Weatherization Assistance Program. These owners are not required to make contributions.

The owner may meet the owner contribution requirement in any of the following ways:

1. Cash Contribution
2. Rebate or rent reduction (the rebate period cannot exceed two years)
3. Weatherization materials donated

*An owner must agree not to raise rents for a period of two years because of the increased value of the dwelling unit(s) when the value is increased solely because of the weatherization work.*

*Owners must agree to inform tenants of this rent provision and of owner contributions that result in rebates or rent reductions.*

## **Multi-family Housing Weatherization Plan and Permission**

A sub grantee shall submit a multi-family housing weatherization project plan and gain permission from GEFA before weatherization any multi-family dwelling units and thereafter must comply with the approved plan.

### Multi-family Preliminary Investigation and Permission Process

Agency needs to secure from the property owner(s) the information needed to complete the multi-family preliminary application. Agencies must use the form provided by GEFA and all required information must be completed. Agencies are advised to follow these steps when submitting paperwork to GEFA for approval:

1. Tenant Issues:
  - a. Cover letter to include how tenants will be notified of the Weatherization Program and the Health and Safety requirements (i.e. lead and mold information, and health and safety issues) as required.
  - b. Evidence that the owner understands they will not raise rent(s) for a period of two years because of the increased value of the dwelling unit(s) when the value is increased solely because of the weatherization work.
  - c. Affected households eligible for weatherization are notified that rent cannot be increased per item (2) above.
  - d. Tenants are informed of owner contributions in the form of rebates and rent reductions, where required.
  - e. Tenants are notified in writing of the formal complaint process (see section XX for this process)
2. Property Documents:
  - a. Preliminary application
  - b. Detailed Scope of Work highlighting the proposed weatherization measures and any energy problem areas.
  - c. Matching funds – description if owner is using other programs for other repair and/or renovations (i.e. Low-Income Housing Tax Credits, etc.)
  - d. Letter of commitment from owner outlining their contribution.
  - e. Project Schedule (preferably in GANTT Chart format using MicroSoft Project)
  - f. Net energy savings/benefit potential.

GEFA will review the above documents for accuracy and approval/disapproval. Upon approval for the preliminary phase Agency has the ability to move forward with the final application and landlord agreement.

### Final Application

Agency submits all supplement/final applications and landlord agreement to GEFA along with a final project budget and scope. Upon review GEFA will issue an approval/disapproval letter. Work can not start on a multi-family project unless an agency has received the final approval letter from GEFA.

### **Multi-Family/Rental Weatherization Complaint Procedures**

- Step 1. Tenant or property owner to contact agency provider to log complaint.
- Step 2. Agency will instruct tenant or property to complete formal written complaint.
- Step 3. Agency will contact tenant or property owner to notify them of the complaint.
- Step 4. Tenant or Property Owner submit written rebuttal.
- Step 5. Agency will determine if the complaint is legitimate.
- Step 6. If the complaint is legitimate (violating agreement), agency will write letter to owner or tenant giving them a 30-day notification to remedy the problem, submit documented proof or face penalties and/or legal action.
- Step 7. If not remedied locally, escalate to GEFA Weatherization Assistance Program with all written documentation. The written request for investigation should be sent to: Weatherization Assistance Program, Division of Energy Resources, 233 Peachtree St, NE, Ste 900, Atlanta, GA 30303
- Step 8. GEFA to write letter to property owner or tenant with a 30-day remedy period. GEFA to copy all other funding agencies involved in the property (HUD, DCA, etc.)
- Step 9. If no remedy refer to Georgia State Legal Department.

### **MULTI FAMILY WEATHERIZATION WAITING LIST PROCEDURES**

Listed below are the waiting list procedures for weatherization multi-family program.

Applications are assessed with a number of priorities based on information taken from the application. Priority is given to disabled, elderly, elderly handicapped, household with children, and household with high heating utility bills. Preference points determine your position on the waiting list. The person with the most points will be placed at the top of the waiting list. Unsigned applications will be assigned -0- points. **\*\*Please Note: Service Providers should maintain a separate waitlist for multi-family applicants from your single-family waitlist.**

Listed below is the priority list rating criteria:

Category	Priority Points												
<b>Age</b>	<p>Total of 4 points if the household contains any member age 0 to 12 or age 60+; Total of 0 points if the household does not contain any members in those age groups</p> <p>Children (2 years of age or under) = (4 points)</p> <p>(3 years through 12 years) = (4 points)</p> <p>Elderly (60 yrs or over) = (4 points)</p>												
<b>Disability</b>	<p>One point for family member with a disability</p> <p>Disability = 1 point</p>												
<b>Occupants</b>	<p>Up to 5 points based on the total number of occupants in the household</p> <table border="1" data-bbox="540 898 1097 1150"> <thead> <tr> <th>Occupant Number</th> <th>Point</th> </tr> </thead> <tbody> <tr> <td>1 to 2</td> <td>1</td> </tr> <tr> <td>3 to 4</td> <td>2</td> </tr> <tr> <td>5 to 6</td> <td>3</td> </tr> <tr> <td>7 to 8</td> <td>4</td> </tr> <tr> <td>9+</td> <td>5</td> </tr> </tbody> </table>	Occupant Number	Point	1 to 2	1	3 to 4	2	5 to 6	3	7 to 8	4	9+	5
Occupant Number	Point												
1 to 2	1												
3 to 4	2												
5 to 6	3												
7 to 8	4												
9+	5												
<b>Waiting time</b>	<p>Up to 5 points based on the total time that the client has been waiting for service</p> <table border="1" data-bbox="540 1276 1097 1528"> <thead> <tr> <th>Waiting Months</th> <th>Point</th> </tr> </thead> <tbody> <tr> <td>6 to 12</td> <td>1</td> </tr> <tr> <td>13 to 24</td> <td>2</td> </tr> <tr> <td>25 to 36</td> <td>3</td> </tr> <tr> <td>37 to 49</td> <td>4</td> </tr> <tr> <td>50+</td> <td>5</td> </tr> </tbody> </table>	Waiting Months	Point	6 to 12	1	13 to 24	2	25 to 36	3	37 to 49	4	50+	5
Waiting Months	Point												
6 to 12	1												
13 to 24	2												
25 to 36	3												
37 to 49	4												
50+	5												

**High Energy Use/  
High Energy Burden**

The following mathematical calculation will be used to determine the energy burden of a household:

$$\text{divided by } \frac{\text{Current Monthly Household Energy cost}}{\text{Current Monthly Household Income}} = \% \text{ of Energy Burden}$$

**Example:**

**Current Monthly Cost of Energy: \$100**

**Current Monthly Household Income: \$1000 = 10% Energy Burden**

After each household's energy burden is calculated, the household is categorized using the priority group chart listed below:

Priority Group Energy Burden *Points*

Priority Group	Energy Burden	Points Assigned
<b>1</b>	<b>35.1 - 50%</b>	<b>6</b>
<b>2</b>	<b>25.1 - 35%</b>	<b>5</b>
<b>3</b>	<b>15.1% - 25%</b>	<b>4</b>
<b>4</b>	<b>10.1% - 15%</b>	<b>3</b>
<b>5</b>	<b>5.1% - 10%</b>	<b>2</b>
<b>6</b>	<b>0 - 5%</b>	<b>1</b>

For Example: If the energy burden is 10%, the priority group is 5 – *points 2*.

If the energy burden is 19%, the priority group is 3 – *points 4*.

If the energy burden is 3%, the priority group is 6 – *points 1*

**Poverty level**

Up to 8 points based on the percent of the federal poverty level represented by the client's income level:

- 8 points: Under 75%
- 6 points: 75%-100%
- 4 points: 101%-125%
- 2 points: 126%-200%
- 0 points: Above 200%

DRAFT