Example Template: Request for Qualifications for Single Family Weatherization Assistance Program Contractors

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# Front Material

## Table of Acronyms

|  |  |
| --- | --- |
| **Acronym** | **Full Name** |
| CFR | Code of Federal Regulations |
| DOE | US Department of Energy |
| RFQ | Request for Qualifications |
| SWS | Standard Work Specifications |
| WAP | Weatherization Assistance Program |
| WPN | Weatherization Program Notice |

## Glossary of Terms

|  |  |
| --- | --- |
| **Term** | **Definition** |
| 10 CFR 440 | US government-provided rules and regulations for WAP. |
| 2 CFR 200 | US government-provided rules and regulations for federal grants and procurement of goods and services using federally granted funds. |
| DOE Weatherization Memo | Documents issued by DOE used to provide guidance, updates, policy changes, or clarifications to grantees, subgrantees, contractors, and other stakeholders within WAP. |
| DOE Weatherization Program Notice | Documents issued by DOE used to inform grantees, subgrantees, contractors, and other stakeholders about specific policies, procedures, and standards that must be followed within WAP. |
| Low income | Households with a gross annual income of less than 200% of the federal poverty limit which qualify for WAP services. |
| Request for Qualifications | A type of procurement process to pre-qualify contractors or service providers based on their qualifications, expertise, and experience before moving forward with a project or service contract. |
| Standard Work Specification Field Guide | The manual which outlines the standardized procedures and guidelines for performing WAP work to ensure that the retrofitting and energy efficiency improvements done under WAP meet consistent quality standards across retrofit projects. |
| State Plan | The grantee WAP provider's detailed plan for how it will run its WAP services within its state or territory. |
| WAP Contractor | An organization which contracts with a WAP grantee or subgrantee in order to provide WAP services to households. |
| Weatherization Assistance Program | A federally funded, DOE program that assists low-income households across the US and its territories in saving energy and money through energy efficiency and renewable energy retrofits. |
| Grantee | The organization receiving WAP funds from DOE, most often a state government entity. |
| Subgrantee | The organization WAP funds from the grantee, which then uses the funds to provide WAP services to households directly or through WAP contractors. |

# Introduction

## RFQ Purpose

The purpose of this Request for Qualification (RFQ) is to identify and prequalify contractors who can provide residential energy efficiency retrofit services for the Weatherization Assistance Program (WAP). The selected contractors will be pre-qualified work with WAP.

## WAP Background

WAP provides energy efficiency services to eligible low-income households. The main objectives of WAP are to reduce energy consumption, lower utility bills for low-income households, reduce energy burden, improve indoor air quality, and home comfort. These services include energy audits, insulation, lighting, heating and cooling system upgrades, and other energy-saving measures. The program is funded by the US Department of Energy (DOE).

## WAP Background Material

The following will provide additional information about WAP at both the federal level and within the state for which you are applying to serve.

* [DOE WAP Website](https://www.energy.gov/scep/wap/weatherization-assistance-program)
* [DOE Weatherization Program Notices (WPNs) and Memos](https://www.energy.gov/scep/wap/weatherization-program-notices-and-memorandums)
* [10 CFR 440: Code of Federal Regulation for WAP](https://www.ecfr.gov/current/title-10/chapter-II/subchapter-D/part-440/section-440.18)
* [WAP Standard Work Specifications (SWS)](https://sws.nrel.gov/)
* *[Link to grantee’s DOE WAP State Plan]*
* *[Link to grantee’s Policy and Procedure Manual]*
* *[Link to grantee’s SWS Field Guide]*
* *[Additional materials from the grantee and subgrantees as necessary]*

## RFQ Issuer Contact Information

* Primary Contact: *[Name, Title, Email, Phone]*
* Submission Address: *[Physical or Email Address]*

# RFQ Submission Components and Timeline

## Submission Components

The following table lists the required components for the RFQ submission. The RFQ must be submitted in PDF format, ideally as one single PDF. Incomplete RFQ submissions will be disqualified.

|  |  |  |
| --- | --- | --- |
| **#** | **Attachment Name** | **Attachment Description** |
| 1 | Cover Letter | Introduction to your organization and intent to submit. |
| 2 | Company Overview | Brief history, mission, and experience in energy efficiency retrofits. |
| 3 | Personnel Details | Resumes and qualifications of key team members, including project managers and lead technicians. |
| 4 | Responses to Questions | Responses to each of the questions to detail qualification and experience for WAP work. |
| 5 | Portfolio of example WAP work | A portfolio of at least three WAP or similar projects you have completed. Include all necessary documentation (i.e. photos, audit, inspection, work order, project description, etc.) |
| 6 | References | At least three references from previous funders or clients. |
| 7 | Resident Testimonials | At least three testimonials from residents on whose homes you worked on. |
| 8 | Proof of insurance coverage and limits | Proof of insurance and limits from your insurance company. |
| 9 | Proof of bonding | Proof of bonding from your bonding company. |
| 10 | Auditor certifications | PDFs of certifications for your auditors to perform WAP audits. |
| 11 | Inspector Certifications | PDFs of certifications for your inspectors to perform WAP QCIs. |
| 12 | Retrofit installer training documentation | PDFs of training received by your retrofit installers. |
| 13 | Professional licenses for electricians, plumbers, etc. | Professional licenses for your electricians, plumbers, and other licensed building professionals. |
| 14 | EPA Certified Renovator certification | PDFs of certification for EPA Certified Renovator for appropriate staff members. |
| 15 | Lead training certifications | PDFs of certification for lead-based paint training for appropriate staff members. |
| 16 | Asbestos training certifications | PDFs of certification for asbestos for appropriate staff members. |

## RFQ Timeline

The following table details the timeline for RFQ submission and selection.

|  |  |
| --- | --- |
| **Milestone** | **Deadline Date** |
| RFQ Communication and Advertising | 3/1/2025 |
| RFQ Informational Meeting | 3/15/2025 |
| RFQ Issuance Date | 3/22/2025 |
| Deadline for Questions and Comments | 4/8/2025 |
| Questions and Comments Responses Deadline | 4/15/2025 |
| RFQ Submission Deadline | 5/15/2025 |
| RFQ Interviews Deadline | 6/1/2025 |
| RFQ Evaluation Deadline | 6/15/2025 |
| RFQ Selection Announcement | 6/30/2025 |

# Project Overview

## Scope of Work

Contractors will be responsible for the following specific tasks.

|  |
| --- |
| **Service** |
| Household resident energy education |
| Energy auditing of single-family homes |
| Energy efficiency retrofits of single-family homes |
| Energy efficiency inspections of single-family homes |

## Qualifications

The following are the required and preferred qualifications for respondents. To qualify for the RFQ, you must meet all required qualifications. Your responses to the questions in the following section will demonstrate your level of qualification.

|  |  |
| --- | --- |
| **Qualification** | **Mandatory/Preferred** |
| Ability to follow the WAP Standard Work Specifications ("SWS")? | Mandatory |
| Ability to keep records containing all the necessary information for the WAP retrofit and project invoicing. | Mandatory |
| Ability to meet the appropriate requirements of 10 CRF 440, especially sections 440.18 through 440.25. | Mandatory |
| Ability to meet the material disposal requirements that meet or exceed the Environmental Protection Agency recovered material rule of 2 CFR 200.323. | Mandatory |
| Ability to meet the requirements of appropriate Weatherization Program Notices. | Mandatory |
| Ability to provide ongoing reporting on WAP retrofit projects. | Mandatory |
| Ability to warranty WAP work from defect for a minimum of one year. | Mandatory |
| All energy auditors who will be performing audits are currently certified to perform WAP energy audits. Certifications must be provided. | Mandatory |
| All inspectors who will be performing inspections are currently WAP QCI certified. Certifications must be provided. | Mandatory |
| All materials used in WAP retrofit projects meet or exceed WAP standards as described in 10 CFR 440 Appendix A. | Mandatory |
| All retrofit installers have been trained in WAP-specific installation techniques and procedures. | Mandatory |
| Minimum of five years of experience working on WAP retrofits. | Mandatory |
| Organizational certification in EPA's Certified Renovator program. | Mandatory |
| Proof of adequate insurance coverage and bonding. | Mandatory |
| Ability to invoice funders in an accurate and timely manner. | Mandatory |
| Ability to provide licenses for any applicable professionals including electricians, plumbers, etc. | Mandatory |
| The RFQ submission is complete and includes all necessary components. | Mandatory |
| Ability to provide client education. | Preferred |
| Individual auditor, retrofit installer, and inspector certifications for asbestos identification. | Preferred |
| Individual auditor, retrofit installer, and inspector certifications for lead paint identification. | Preferred |
| Proof of OSHA 10 certification for all job site staff members. | Preferred |

## Questions

Your responses to the following questions will demonstrate your level of qualification as a WAP contractor for this RFQ. Please answer these questions to the best of your ability with the intent of demonstrating your experience to meet the qualifications detailed in the section above. Write out the question above each response. Make your responses as concise as possible while still demonstrating your expertise and experience related to the question.

|  |  |
| --- | --- |
| **Question** | **Area** |
| Are there any future projects or initiatives your company is pursuing that would enhance your ability to perform under this RFQ? | Additional Information |
| How does your company plan to innovate or adapt to future trends in residential energy efficiency and WAP-specific requirements? | Additional Information |
| Can you provide client testimonials or performance evaluations from past projects, particularly from similar government-funded programs? | Client Satisfaction and Communication |
| How do you ensure clear communication with clients throughout the project? Provide examples of how you have effectively managed client expectations in the past. | Client Satisfaction and Communication |
| What feedback mechanisms do you have in place to assess client satisfaction, and how do you act on that feedback? | Client Satisfaction and Communication |
| Can you describe the evolution of your company in the context of energy efficiency and sustainability? | Company Overview |
| How does your company’s mission align with the goals of WAP? | Company Overview |
| Describe your ability to meet the requirements of 10 CFR 440, especially sections 440.18 through 440.25. | Compliance |
| Describe your ability to meet the requirements of appropriate Weatherization Program Notices. | Compliance |
| Have you ever been subject to any regulatory investigations or penalties? If so, please provide details and outcomes. | Compliance |
| How do you stay informed about and ensure compliance with all applicable federal, state, and local regulations, particularly those related to energy efficiency and residential retrofits? | Compliance |
| What measures do you take to ensure transparency and ethical practices in all your business dealings, especially in government-funded projects? | Compliance |
| Can you provide a portfolio of energy efficiency retrofits completed in the past three years? | Experience |
| Describe how your company minimizes waste and reduces the environmental impact of your retrofit projects. | Experience |
| How do you ensure that your retrofit projects meet or exceed WAP energy efficiency standards? | Experience |
| How do you stay current with the latest technologies and best practices in residential energy efficiency? | Experience |
| What certifications or programs (e.g., ENERGY STAR, LEED) does your company participate in to promote sustainability? | Experience |
| What experience do you have with specialized energy efficiency measures, such as solar energy integration, advanced HVAC systems, or smart home technologies? | Experience |
| Describe your ability to manage funding sources separately, specifically managing federal and non-federal funds and keeping those funds separate. | Financial |
| Describe your financial systems and how you handle invoicing to ensure accuracy and timeliness of invoice submission to funders. | Financial |
| Have there been any recent changes to your financial situation that could impact your ability to complete projects under this RFQ? | Financial |
| What levels of insurance and bonding does your company maintain, and how do they align with the requirements of this program? | Financial |
| Can you provide your safety record for the past five years, including any incidents and the steps taken to prevent future occurrences? | Health and Safety |
| How do you ensure that all safety protocols are followed on job sites, particularly in residential settings with potentially vulnerable occupants? | Health and Safety |
| Are you able to procure, store, and manage WAP retrofit materials? | Materials |
| Describe how you ensure that your materials meet the WAP standards? | Materials |
| Describe you ability to meet the material disposal requirements that meet or exceed the Environmental Protection Agency recovered material rule of 2 CFR 200.323. | Materials |
| Describe your ability and procedure to give preference to products and materials made in the United States. | Materials |
| Describe your inventory management system. | Materials |
| Can you provide examples of how your team has successfully worked together on complex projects? | Personnel and Team |
| Describe the process of ensuring your staff is up to date on WAP training and certifications. | Personnel and Team |
| Describe your energy audit process. | Personnel and Team |
| Describe your Quality Control Inspection process. | Personnel and Team |
| How do you ensure effective communication and coordination among your team members during a project? | Personnel and Team |
| How many energy auditors do you have on your staff? | Personnel and Team |
| How many inspectors do you have on your staff? | Personnel and Team |
| How many of your energy auditors are currently WAP certified for performing energy audits? Please provide proof of certification for each auditor. | Personnel and Team |
| How many retrofit installers do you currently have on your staff? | Personnel and Team |
| What ongoing training programs do you have in place to ensure your team’s skills are up to date with current energy efficiency standards and technologies? | Personnel and Team |
| What percentage of your inspectors are currently WAP QCI certified? Please provide proof of certification for each inspector. | Personnel and Team |
| What training requirements do you have for retrofit installer staff members? | Personnel and Team |
| Can you provide examples of how you have scaled your operations in response to increased project demands? | Resource Management |
| How do you manage your workforce and resources during peak periods to ensure that all projects are completed on time and within budget? | Resource Management |
| If applicable, how do you manage and ensure the quality of work performed by subcontractors? | Resource Management |
| Beyond WAP QCI, what quality assurance protocols do you have in place to ensure that all work meets WAP standards and is performed to the highest level of quality? | Technical Approach |
| Describe your ability to follow the WAP Standard Work Specifications ("SWS")? | Technical Approach |
| Describe your approach to scheduling and sequencing work in a way that minimizes disruption to occupants while ensuring timely project completion. | Technical Approach |
| Describe your approach to specific needs and characteristics of individual homes? | Technical Approach |
| Describe your process of providing a warranty on all WAP work. | Technical Approach |
| Describe your process of providing client education to household residents in WAP-serviced homes. | Technical Approach |
| What audit tool do you use for multifamily project energy audits? | Technical Approach |

# Evaluation Criteria

Submissions will be evaluated by the RFQ Issuer based on the following rubric. The rubric provides weighting for each section of the RFQ to indicate areas of greatest importance.

|  |  |  |  |
| --- | --- | --- | --- |
| **Scoring Area** | **Scoring Weight** | **Raw Score**  **(1 to 10)** | **Weighted Score** |
| **Preferred Qualifications** | 3.0 |  | 0.0 |
| **Responses to Questions** |  |  |  |
| Additional Information | 1.0 |  | 0.0 |
| Client Satisfaction and Communication | 2.0 |  | 0.0 |
| Company Overview | 3.0 |  | 0.0 |
| Compliance | 5.0 |  | 0.0 |
| Experience | 5.0 |  | 0.0 |
| Financial | 5.0 |  | 0.0 |
| Health and Safety | 5.0 |  | 0.0 |
| Materials | 5.0 |  | 0.0 |
| Personnel and Team | 5.0 |  | 0.0 |
| Resource Management | 3.0 |  | 0.0 |
| Technical Approach | 5.0 |  | 0.0 |
|  |  |  |  |
| **Meets Required Qualifications** | Yes/No | Yes | Qualified |
|  |  |  |  |
|  |  | **Total Score** | **0.0** |
|  |  |  | out of |
|  |  |  | 10.0 |

# Terms and Conditions

[Include your organization’s terms and conditions here]