

# Bipartisan Infrastructure Law (BIL) Weatherization Temporary Subgrantee Notice of Funding Availability: Bidders Conference

February 21st, 2024



**Homes and  
Community Renewal**

# Before beginning, a few reminders to ensure a smooth discussion

- Members should be on mute if not speaking.
- If using phone for audio, please tap the phone mute button.
- If using computer for audio, please click the mute button on the computer
- Video is encouraged, in particular when speaking.
- There will be opportunities for questions and active participation. Please hold your questions until that time.
- In the event of a question or comment, please use the hand raise function You can find the hand raise button by clicking the participant panel button
- Session Moderators will call on participants

# Overview

1. Introduction
  - a) NYS Climate Goals
  - b) BIL Program Overview
2. Funding Availability and General Requirements
3. Application Submission
4. Evaluation and Selection Criteria
5. Required Contract Materials
6. Q&A



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Community Renewal**

# Program Overview: BIL & CLCPA Foundational Goals

## New York's Nation-Leading Climate Targets

85% Reduction in GHG Emissions by 2050

100% Zero-emission Electricity by 2040

70% Renewable Energy by 2030

9,000 MW of Offshore Wind by 2035

3,000 MW of Energy Storage by 2030

6,000 MW of Solar by 2025

22 Million Tons of Carbon Reduction through Energy Efficiency and Electrification

## NEW YORK'S CLIMATE LEADERSHIP and COMMUNITY PROTECTION ACT



New York's landmark new law, the Climate Leadership and Community Protection Act (Climate Act), is demonstrating to the nation how to confront the greatest threat facing life as we know it — a rapidly changing climate. Signed into law in July 2019, the Climate Act will empower every New Yorker to fight climate change and provide the opportunity to improve all our daily lives.

This is our planet. This is our time to fight for it.

By 2040: achieve 100% zero-emission electricity | By 2050: reduce emissions at least 85% below 1990 levels

Achieving the ambitious goals of this law will mean transforming the way we generate and use electricity, the way we heat our homes, and the way we get to school and work. New Yorkers will tackle climate change and create new opportunities for our children and grandchildren. Through thoughtful planning, this effort will breathe life into our economy with well-paying clean energy jobs, new industries and business opportunities, and improved health and quality of life for New York families and communities. New York's course on climate action also means spending less on fossil fuels and keeping our energy dollars in the local economy, and in the pockets of hardworking New Yorkers.

As we experience record temperatures and extreme storms, the Climate Act compels us to take action. New York will undertake a sweeping set of measures to reduce our carbon footprint, make our communities more resilient, and adapt to a changing climate. The State's new climate law sets the stage for this and creates the opportunity for citizens and communities to partner with businesses, schools, and government to create a green economy and build a climate-proof future.

### What the Climate Act means for New York State

**CLEAN ELECTRIC GRID OF TOMORROW** | Solar, wind, and other renewables, combined with energy storage will deliver affordable and reliable electricity over the next decade and beyond

**COMFORTABLE, AFFORDABLE, AND SAFE ENERGY EFFICIENT HOMES AND BUSINESSES** | New clean heating and cooling technologies, such as electric heat pumps and smart thermostats, combined with energy efficiency, will save New Yorkers energy and money

**CLEAN, RELIABLE TRANSPORTATION** | Zero emission transportation options for families and neighborhoods will enable New York to trade gridlock and diesel fumes for fresh air and cleaner communities

**A CLEAN ENERGY ECONOMY FOR EVERYONE** | Every community, every trade, and every region will have access to clean energy solutions and the economic opportunities that the transition to a just and equitable energy system provides

### Benefits of New York State's climate leadership

**JOBS** | Creating thousands of green jobs in communities across the State — from building trades and technicians to engineers and financiers — making New York a hub of clean energy economic growth

**A HEALTHIER NY** | Reducing greenhouse gases and local pollution to keep our communities healthier, reduce respiratory illnesses and premature deaths, and avoid healthcare costs that limit our progress and success

**AFFORDABLE ENERGY** | Reducing energy consumption and utility bills by increasing access to ever-improving clean, efficient, and reliable energy solutions

**EMPOWERMENT** | Providing a seat at the table for disadvantaged communities, and ensuring good paying job opportunities for all New Yorkers

Find out more and learn what you can do [climate.ny.gov](https://climate.ny.gov)  
Send all of your questions and feedback to [climateact@dec.ny.gov](mailto:climateact@dec.ny.gov)

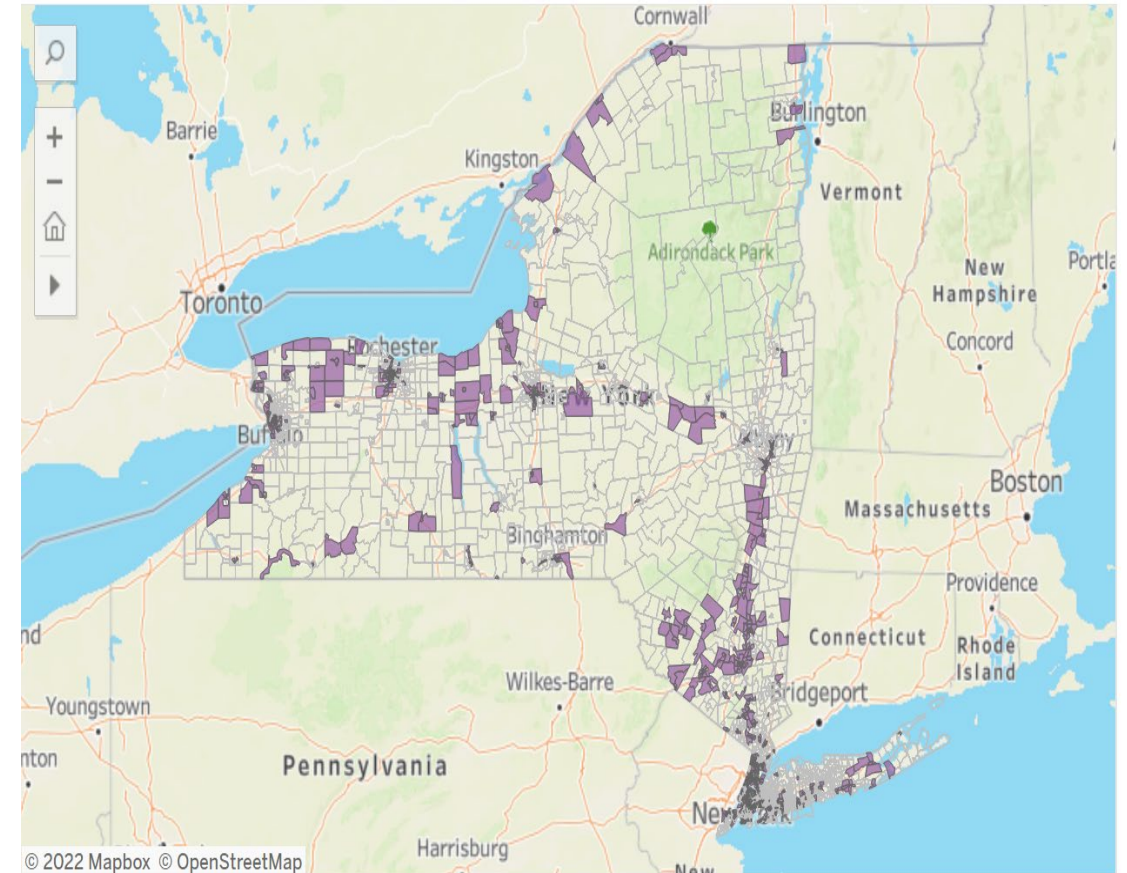




# Disadvantaged Communities Under the CLCPA

New York's Climate Act and the Federal Justice 40 legislation recognizes that climate change doesn't affect all communities equally. The Climate Act charged the Climate Justice Working Group (CJWG) with the development of criteria to identify disadvantaged communities to ensure that frontline and otherwise underserved communities.

BIL Temporary Subgrantee applications will be considered with a prioritization for DACs



# NYS Bipartisan Infrastructure Law (BIL) Weatherization Assistance Program

## Typical Weatherization Measures



### **MECHANICAL** MEASURES

- Clean, tune, repair, or replace heating and/or cooling systems
- Install duct and heating pipe insulation
- Repair leaks in heating/cooling ducts
- Install programmable thermostats
- Repair/replace water heaters
- Install water heater tank insulation
- Insulate water heating pipes
- Install solar hot water heating systems.



### **BUILDING SHELL** MEASURES

- Install insulation where needed
- Perform air sealing
- Repair/replace windows and doors
- Install window film, awnings, and solar screens
- Repair minor roof and wall leaks prior to attic or wall insulation.



### **ELECTRIC and WATER** MEASURES

- Install efficient light sources
- Install low-flow showerheads
- Replace inefficient refrigerators with energy-efficient models.



### **HEALTH and SAFETY** MEASURES

- Perform heating system safety testing
- Perform combustion appliance safety testing
- Repair/replace vent systems to ensure combustion gas drafts safely outside
- Install mechanical ventilation to ensure adequate indoor air quality
- Install smoke and carbon monoxide alarms when needed
- Evaluate mold/moisture hazards
- Perform incidental safety repairs when needed.

# NYS Bipartisan Infrastructure Law (BIL) Weatherization Assistance Program Funding Availability

- NYS has been allocated \$289M of BIL funds
- The maximum individual temporary subgrantee contract will not exceed \$5 million per contract term.
- To facilitate this effort, the ‘Temporary Subgrantee’ contracts being solicited via this NOFA will be issued and executed with the NYS Housing and Trust Fund Corporation (HTFC), not DHCR.
- Temporary subgrantees will be awarded an initial 12-month contract with a performance based renewal option through 2027.
- Project Measures are required to meet a Savings to Investment Ratio of 1.

## Example Savings to Investment Ratio Analysis

Model Inputs	
<i>System Details</i>	
Cost per Watt (DC-STC):	\$3.00
Analysis period (years)	30
Degradation rate (per year)	0.75%
<i>Market Assumptions</i>	
Electric and O&M rate escalation	2.3%
O&M costs (\$ per kW/yr)	\$29
Discount rate	3.0%
<i>Incentives</i>	
Investment tax credit (% total cost)	30%
Production-based incentive (\$/kWh)	\$0.00
Years of incentive (years)	
Other incentive (\$/W)	\$0.00
Proposed System Size (kW):	5.00
Total Purchase Price:	\$15,000
Custom SIR Analysis	
Capacity Factor	15%
Electric Rate	\$0.11
SIR	0.86

# Funding Availability for Temporary Subgrantees

- A maximum of \$40 million of the BIL funding will be made available to eligible applicants to serve as temporary subgrantees for the purpose of targeting multi-family portfolios that have significant need for energy assistance (for example: government assisted housing, public housing, housing for persons with special needs).





# NYS BIL Weatherization Assistance Program Overview

- Funds, up to an average of \$8,250 per dwelling unit, are provided to weatherize the dwelling units of homeowners and renters
- Program services are delivered through a statewide network of local service providers, referred to as Subgrantees.
- All laborers and mechanics employed by contractors and subcontractors on Weatherization Assistance Program projects funded by BIL shall comply with:
  - BIL Wage Rate provisions that state Multifamily buildings 5 units and above will comply with Davis Bacon and Buy American Provisions.
    - Davis Bacon is only required while workers are on site.

Program Year	Total Allowable ACPU	Renewables ACPU (Renewables ACPU is part of the Total Allowable ACPU)
2022	\$8009	\$3929
2023	\$8250	\$4047
2024	\$8497	\$4169
2025	TBD	TBD
2026	TBD	TBD
BIL Grant Average	= Average of PY 2022 through PY 2026	= Average of PY 2022 through PY 2026



# Schedule for Temporary Subgrantee NOFA

## Schedule

<b>NOFA Issued</b>	<b>February 12<sup>th</sup>, 2024</b>
<b>Application Workshop/Bidder’s Conference</b>	<b>February 21<sup>st</sup>, 2024</b>
<b>Deadline to Submit Questions</b>	<b>February 23<sup>rd</sup>, 2024</b>
<b>Answers to be Posted on HTFC web site</b>	<b>February 26<sup>th</sup>, 2024</b>
<b>Submission Deadline</b>	<b>March 7<sup>th</sup>, 2024 (3:00 P.M. EST)</b>
<b>Announcement of Successful Applications</b>	<b>March 29<sup>th</sup>, 2024</b>

# BIL WAP TEMPORARY SUBGRANTEE LEVERAGING OPPORTUNITIES

\*Average WAP dollar is leveraged with \$3.06 dollars of investment from partner programs nationwide

Project Leveraging Potential	Yes	No
Weatherization		X
SERC	X	
WRF	X	
HEAP	X	
HOME, CLIMATE FRIENDLY HOMES FUND, & OTHER HCR FUNDED PROGRAMS	X	
NYSERDA: MPP AND EMPOWER	X	
HUD PROGRAMS	X	

# Temporary Subgrantee Applicant Eligibility

This solicitation is being completed in conformance with the requirements outlined in Section 440 of the Weatherization Assistance Program Final Rule, as published by DOE on February 1, 2002.

- a) be a not-for-profit and legally incorporated organization, community action agency, or a unit of local government, or the designated representative of an Indian tribal organization.
- b) be in legal and financial compliance with requirements and regulations established under State and federal law.
- c) provide a list of the current board of directors or governing body, bylaws, and other documents concerning the structure and operation of the organization.





# Role of Temporary Subgrantees

Under contract with HTFC, temporary subgrantees perform several services defined on page 4 of the [BIL State Plan](#) and included below:

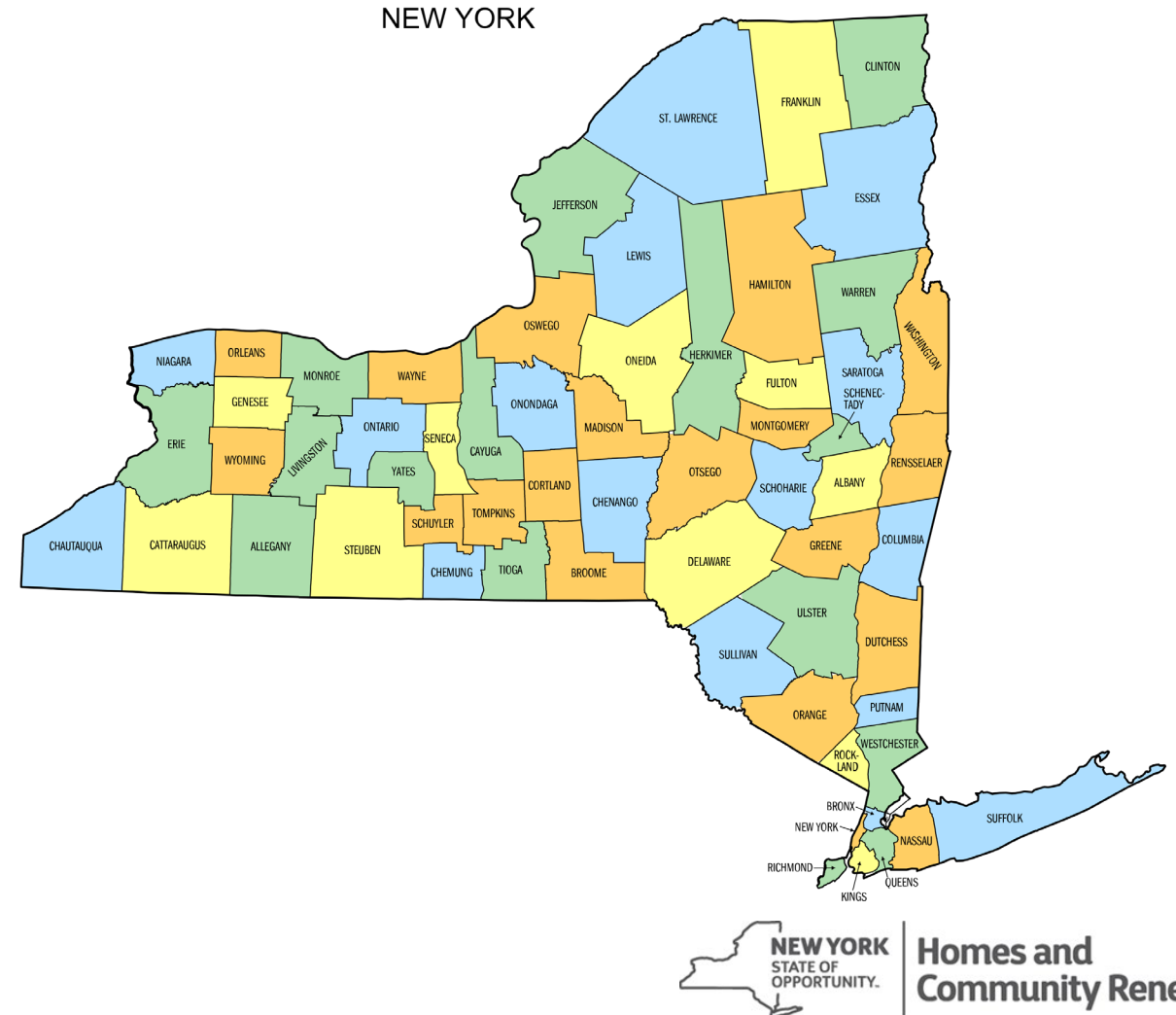
- a) identification of eligible clients;
- b) evaluation of dwelling units to be weatherized;
- c) installation of energy-saving measures;
- d) identification and mitigation of related health and safety concerns;
- e) supervision of weatherization work performed by staff or subcontractors;
- f) maintenance of client and program files; and
- g) reparation of regular management and fiscal progress reports.

# Administrative Fees and Advances

- HTFC provides administrative funding to temporary subgrantees and the administrative rate for temporary subgrantees will be no more than 7.5% of the BIL allocation.
- Administrative funding can be used by temporary subgrantees to cover costs that are necessary for the organization to operate.
- Any contracts awarded under this procurement may provide advance payments not to exceed 15% of the total allocation and will be paid following final approval of the contract.

## Temporary Subgrantee Contract Locations

- There will be a maximum of 2 temporary subgrantees per county and 3 per region (BUF, NYR, CDR)



# Targeted Building Portfolios

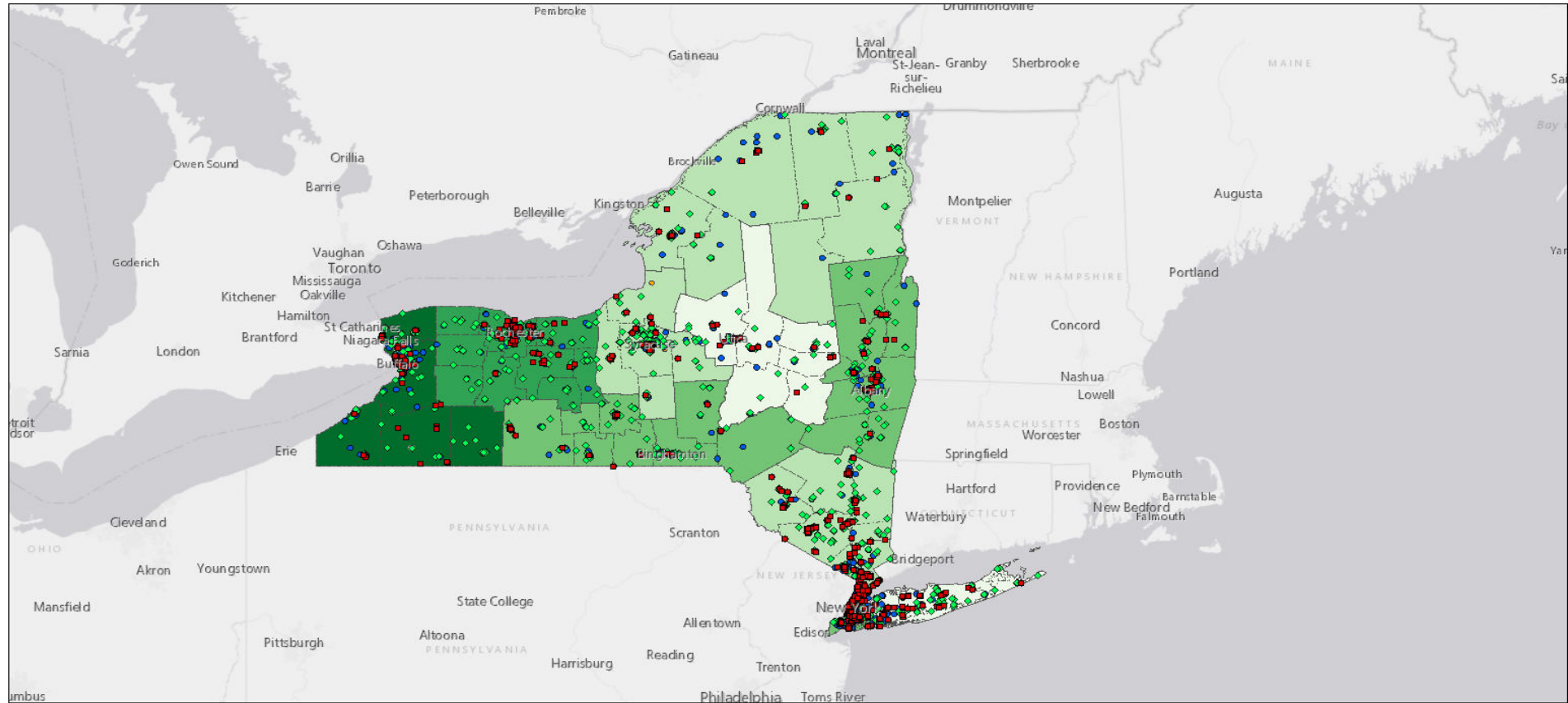
- A. Low-income housing tax credit projects (ref. Section 42 of US Code)
- B. USDA Section 515 projects
- C. Supportive or Special Needs projects (may include but not limited to projects created by or assisted with resources from the NYS Office for People With Developmental Disabilities, NYS Office of Mental Health or NYS Homeless Housing Assistance Corporation).
- D. HUD-assisted projects
- E. Public Housing projects, including state-supervised public housing
- F. Mitchell Lama projects
- G. Properties within a disadvantaged community census tract
- H. Properties within First Nations and tribal lands



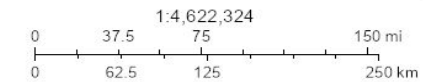
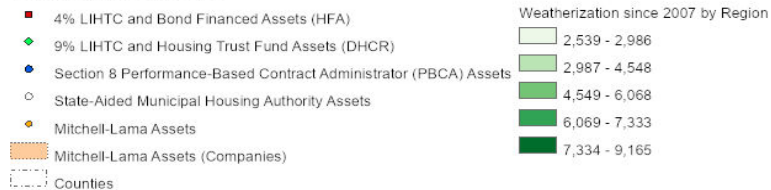


# Identifying Targeted Areas

## NYSHCR Assets



11/13/2023, 2:15:23 PM



Esri, HERE, NPS, Esri, HERE, Garmin, USGS, EPA, NPS

Esri, HERE, Garmin, USGS, EPA, NPS | NYS ITS Geospatial Services based on input from the NYS Legislative Task Force on Demographic Research and Reapportionment ([www.ltftr.state.ny.us](http://www.ltftr.state.ny.us)) and CUNY's Center for Urban Research (<http://www.gc.cuny.edu/urbanresearchmaps>). | NYS ITS Geospatial Services based

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# Populations to be Served

- Income eligibility for the Program is set at [60% of the State’s median income.](#)

## 2023-2024 Income Limits

Household Size	Maximum Gross Monthly Income	Maximum Annual Income
1	\$3,035	\$36,420
2	\$3,970	\$47,640
3	\$4,904	\$58,848
4	\$5,838	\$70,056
5	\$6,772	\$81,264
6	\$7,706	\$92,472
7	\$7,881	\$94,572
8	\$8,056	\$96,672
9	\$8,231	\$98,772
10	\$8,407	\$100,884
11	\$8,582	\$102,984
12	\$8,890	\$106,680
13	\$9,532	\$114,384
Each additional add	\$642	\$7,704

# Weatherization Energy Audits

- Currently, TIPS is the Audit tool used for single family, small buildings, and buildings with up to 25 units, if each unit is individually heated. EAQUIP and TREAT are the Audit tools used for multifamily projects.
- All Fuel switching projects must be modeled with an appropriate Audit tool and submitted to DOE for approval. Note: The TIPS Audit tool cannot be used to model a fuel Switching projects
- Conversion of heating systems would require individual project approval from HCR & DOE to be a permissible scope of work.



# Deliverables

- Applicants responding to this NOFA agree to complete proposed work in accordance with applicable program rules and regulations.
- Expenditures and unit production that are proposed in the attached Production Schedule (Exhibit 2) must be met within 12 months of the contract start date. The [Policy and Procedures Manual \(PPM\)](#) outlines the administrative and field deliverables.





# Application Submission

Applicants should submit proposals to HTFC by electronic mail, using the forms provided for this purpose that are attached to this solicitation. Other required materials may also be attached to an electronic mail message. Electronic submissions are addressed to:

[Weatherization@hcr.ny.gov](mailto:Weatherization@hcr.ny.gov)

The subject line should read “BIL Temporary Subgrantee NOFA”.

Applicants that submit using paper copies must provide five (5) copies of all materials, and address the submission to:

NYS Housing Trust Fund Corporation

Weatherization Assistance Program

Attention: Proposal Submission Screening Jonathan Biber

Hampton Plaza, 9th Floor

38-40 State Street

Albany, New York 12207

**HTFC must receive applications by 3:00 p.m. EST on March 7th, 2024.**



**Homes and  
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# Evaluation and Selection Criteria

- A. Statement of Approach: (40 Points)
- B. Statement of Organizational Experience and Key Personnel:. (20 Points)
- C. Statement of Qualifications/Quality Assurance, Financial and Information Technology Capacity: (15 Points)
- D. Reasonableness of proposed scope and Budget/Leverage: (25 Points)

# Application Submission

## Required Exhibits:

Exhibit 1 – Proposal Summary

Exhibit 2 – Budget/Production Schedule/Statement of Approach

Exhibit 3 – Vendor Responsibility Questionnaire

## Required Attachments:

Attachment A - Applicant Registration Form (for new applicants only)

Attachment B – Recognition and Compliance Confirmation

Attachment C - Statement of Approach

Attachment D - Statement of Organizational Experience

Attachment E - Statement of Qualifications/Quality Assurance

Attachment F - Evidence of Financial Management Capacity

Attachment G - Key Personnel

Attachment H - Information Technology Management

Attachment I – Supplemental Budget Information (use Exhibit 2 as the budget form)

Attachment J – Map identifying geographic need and area served.



# Q&A Session

