

Q&A - Monitoring Services for the Weatherization Assistance Program RFP

- 1. Q: Can respondents submit proposals for only a subset of agencies (e.g., regional focus) for Program Monitoring or Technical Assistance, or is statewide coverage preferred?**

A: Respondents can respond to a subset of agencies. Respondents are also allowed to select statewide coverage. There is not a specific preference for regional or statewide if the coverage selected makes sense. It is expected that there may be multiple companies or individuals selected and collectively the whole state needs to be covered.

- 2. Q: Will selected vendors be allowed to subcontract any portion of the services (e.g., file review or desktop consulting), and if so, what are the requirements for subcontractor disclosure?**

A: Vendors may subcontract. If you plan to subcontract, you must list those entities you plan to contract with, include their resumes and list them in the key personnel identification. It is not acceptable to just list the organization you would subcontract with; you would need to provide the information for the individuals that would be providing the services and what their role and responsibilities would be.

- 3. Q: Are there standardized checklists or evaluation templates that monitors must use during file and agency reviews, or should vendors propose their own tools?**

A: There are checklists and evaluation templates currently. Vendors may propose other tools that would improve the process however the focus of this RFP is not to develop more tools for evaluation.

- 4. Q: How many client files (on average) are associated with each of the 19 subrecipient agencies?**

A: The number of files reviewed depends on the size of the agency, the number of units weatherized, and agency performance. It is approximately 155 files for the entire state.

- 5. Q: Will IHCD provide access to previous years' monitoring reports to inform vendor approach and improvements?**

A: If selected vendors may review previous reports to inform improvements to approach.

- 6. Q: Are there expected travel requirements for the monitors during agency reviews, or will most work be conducted remotely?**

A: It could be a mix of remote and in person. Most of the work can be completed remotely- however there may be instances where it is beneficial to be on-site.

- 7. Q: Can you provide examples of prior Technical Assistance requests (e.g., types of policy recommendations or training sessions)?**

A: IHCDCA has been working on conducting more multifamily weatherization. There have been planning sessions with the IHCDCA program team to think through how to best deliver that, review current WPNs, and ensuring the program policy aligns with DOE rules.

- 8. Q: What platforms or systems does IHCDCA currently use for training delivery (e.g., LMS, Zoom), and should the vendor propose a platform if none exists?**

A: We primarily use Microsoft Teams and in person events.

- 9. Q: Are there expectations for vendor-led in-person training events, or is virtual delivery acceptable/preferred?**

A: It is expected that monitors participate in in-person trainings and virtual trainings.

- 10. Q: Will IHCDCA accept time-and-materials pricing within each activity, or is a fixed-unit cost model (e.g., per file, per day) mandatory?**

A: It is a fixed-cost model. For technical assistance, respondents can provide a not to exceed "X" number of hours amount - though this needs to be broken out by more specific services and cannot be lumped as training and technical assistance. Program monitoring is deliverable based, so that is not acceptable for the tasks in program monitoring.

11. Q: Are there any caps per activity line (e.g., maximum per file review or consulting day) that vendors should be aware of when budgeting?

A: Please refer to the scope of services for the list of estimated amounts for services.

12. Q: Will vendors be granted direct access to the Statewide Weatherization Database? If so, what are the onboarding or security clearance requirements?

A: Selected monitors will be granted access to the statewide weatherization database to conduct their work. They will only be given the permission needed to review things in the system that a monitor should be able to access. Training on the system can be provided.

13. Q: Can you clarify the vendor's expected role in proposing enhancements to the statewide database—should the vendor also include cost estimates for technical development?

A: No, the vendor should not include cost estimates for technical development. The vendors expected role is to “Identify improvements to the Statewide database and assist in development and implementation of those changes.” For example, when reviewing files, is there something that agencies seem to be doing incorrectly that could be aided or made easier in the Statewide Database. The technical assistance should bring this to the attention of IHCD and then once the change is built out, by the tech provider who manages our statewide database, additional technical assistance to ensure the changes in the system are implemented correctly and meet the need addressed.

14. Q: Can you confirm whether resumes provided for key personnel may be longer than one page if relevant experience warrants it?

A: They may not exceed one page per person.

15. Q: Are there any required state or federal certifications (aside from DOE Wx credentials) for monitors or consultants under this contract?

A: No

Technical Monitoring Questions

- 1. Q: Can a respondent propose to serve as both a Single Family and Multifamily Technical Monitor if they hold both HEP QCI and HEP Multifamily QCI certifications?**

A: Yes

- 2. Q: Is there a minimum or maximum number of units each selected vendor should expect to be assigned annually?**

A: No, the number of units each selected vendor is assigned will depend on the number of vendors selected, what areas were assigned to each vendor, and the amount of production that occurs.

- 3. Q: Will IHCD provide the list of agencies (by county or name) prior to award so vendors can plan travel and staffing accordingly?**

A: Yes, the agencies assigned will be clearly assigned in the contract that is issued to the selected respondents.

- 4. Q: Will there be opportunities to expand service areas if other selected vendors are unable to fulfill requirements?**

A: Yes

- 5. Q: What is the current statewide weatherization database used by IHCD for entering QCI reports?**

A: Waplink

- 6. Q: Will IHCD provide any training or onboarding on its QCI tools and forms, or is prior experience with them a requirement?**

A: IHCD can provide onboarding to the tools and forms for monitoring – however it is expected that the monitors have experience with weatherization at a state level and have knowledge of Indiana’s Weatherization Assistance Program.

- 7. Q: Will the technical monitors have remote access to the audit runs and diagnostic data before visiting the site?**

A: Yes

8. Q: Are there standardized templates or digital platforms (e.g., SharePoint, Salesforce) for submitting the monitoring reports and QCI Inspection Forms?

A: Yes

9. Q: For re-work monitoring (Quality Management check), is that work compensated separately or included in the per-unit fee?

A: For re-works agencies submit proof they fixed the issues identified. The technical monitor should not need to go back on site, so it is included in the per-unit fee.

10. Q: The budget estimate is between \$1,400 and \$1,500 per unit — will this be the fixed rate, or should vendors submit their own proposed rate within this range?

A: Submit your proposed rate within that range

11. Q: Should the “TTA” hourly rate include preparation time, or only time spent in meetings and active training?

A: Preparation time for conducting the technical monitoring should be included in the per unit monitored price.

12. Q: Will preference be given to vendors that can cover all counties versus those selecting specific areas?

A: There is not a specific preference for regional or statewide if the coverage selected makes sense. It is expected that there may be multiple companies or individuals selected and collectively the whole state needs to be covered.

13. Q: Is there a standard turnaround time for scheduling inspections after unit completion by the local provider?

A: Currently, no, but there is an effort to create a standard turnaround time in the near future. There is a standard turnaround time for submitting the monitoring report once the inspection(s) are completed.

14. Q: Are monitors expected to coordinate directly with subgrantees for scheduling inspections, or will IHCD facilitate that communication?

A: IHCD will develop a monitoring schedule in regard to order/timing of subgrantee monitoring, but the monitors are expected to coordinate directly with subgrantees to gain access to weatherized units.