

PROPOSAL – Building II

DuPage County - Multi-Family Weatherization Project College Park Apartments - Level 2 Training, Shadowing, Technical Assistance, and Reporting Services

Prepared By:

Community and Economic Development Association of Cook County (CEDA)
567 West Lake Street, Suite 1200
Chicago, Illinois 60661

Prepared For:

DuPage County Community Services Department

Second Building Location: 942-948 College Blvd, Addison, Illinois

Training Level: Level 2 - Agency Shadowing, Process Observation, Technical Assistance, and Findings/Recommendations Reporting

Date: June 18, 2026

PURPOSE OF PROPOSAL

CEDA is pleased to submit this new proposal to DuPage County for Level 2 training, technical assistance, process observation, and reporting support for the second College Park Apartments building located at 942-948 College Blvd, Addison, Illinois.

This proposal is intended to build upon the original Proposal (for Building 902-910 College Blvd, Addison, Illinois) by defining a Level 2 scope of services. Level 2 support is designed to move beyond initial classroom, hands-on, and site-based training by allowing DuPage County staff and agency partners to shadow the agency while the agency performs the necessary multifamily weatherization tasks from intake through closeout.

The purpose of this engagement is to strengthen DuPage County's multifamily weatherization capacity, reinforce compliance-centered implementation, and provide a final written report documenting observations, findings, and practical recommendations for process improvement.

PROJECT UNDERSTANDING

Based on the original proposal and subsequent work, CEDA understands that DuPage County is seeking continued support for multifamily weatherization activities at College Park Apartments. The Level 2 training model will support the second building by combining direct observation, technical assistance, quality assurance, and documentation review across the full project lifecycle.

CEDA will provide these services using a compliance-centered approach aligned with multifamily weatherization practices, technical review, TREAT energy modeling support, field quality assurance, and project management oversight reflected in the original scope of services.

LEVEL 2 TRAINING AND TECHNICAL ASSISTANCE MODEL

For purposes of this proposal, Level 2 training is defined as a structured shadowing and applied technical assistance engagement. Under this model, CEDA will provide DuPage County with opportunities to observe and learn from the agency as it performs the necessary multifamily weatherization tasks associated with the second building.

Level 2 training includes, but is not limited to, shadowing and applied observation of the following functions:

- Client and household intake processes, including eligibility documentation review and workflow considerations.
- Multifamily assessment procedures, including reviewing existing conditions, building science considerations, and scope development inputs.
- Work-in-progress (WIP) monitoring, field implementation review, and project sequencing observations.
- Final inspection activities, including QA/QC review, compliance documentation, and issue resolution processes.
- IWx data entry, documentation standards, reporting workflows, and quality control considerations.
- Stakeholder communication, milestone tracking, contractor coordination, and operational troubleshooting.

The Level 2 model is intended to provide a practical view of the entire multifamily weatherization process while creating a record of lessons learned, observed strengths, operational challenges, and recommended improvements.

SCOPE OF SERVICES

1. Technical Expertise Services

CEDA shall provide technical consulting and implementation support for the second building located at 942-948 College Blvd, Addison, Illinois. Services may include, but are not limited to:

Contract and Proposal Review + Training

- Review contractor proposals for availability, feasibility, compliance, and technical adequacy.
- Review subcontractor scopes of work and procurement documentation.
- Evaluate contractor staffing capacity, scheduling feasibility, and sequencing.

Lead Time and Process Evaluation + Training

- Evaluate material procurement timelines and equipment lead times.
- Review internal workflows and field implementation processes.
- Identify operational bottlenecks impacting project delivery timelines.
- Develop recommendations for improved project coordination and implementation efficiency.

TREAT Energy Modeling Services

Using TREAT (Targeted Retrofit Energy Analysis Tool), CEDA will provide energy modeling consultation services consistent with prior multifamily weatherization modeling work performed for Illinois Community Action Agencies. Services may include:

- Baseline building energy modeling.
- Utility usage analysis.

- Retrofit scenario modeling.
- Savings-to-Investment Ratio (SIR) calculations.
- Cost-effectiveness analysis.
- Retrofit prioritization recommendations.
- Energy savings projections.
- End-use consumption analysis.
- Final modeling reports and recommendations.

CEDA will require supporting building documentation from DuPage County and/or contractors, including utility bills, building specifications, HVAC information, existing conditions documentation, occupancy and operational data, site photos, and field verification documentation.

Cost-Effectiveness Oversight

- Savings-to-Investment Ratios (SIR).
- Measure prioritization.
- Cost-effectiveness compliance.
- Retrofit package evaluation.
- Budget optimization strategies.
- Energy savings verification methodologies.

2. Level 2 Site-Based Shadowing and Training

CEDA shall provide Level 2 training and technical assistance services that allow DuPage County staff and/or designated agency partners to shadow the agency as it performs the tasks necessary to complete the multifamily weatherization process for the second building.

Level 2 Shadowing Components

- Intake shadowing and documentation workflow review.
- Assessment shadowing, including field review, building science considerations, and scope development inputs.
- Work-in-progress monitoring and observation of field implementation activities.
- Final inspection shadowing, including QA/QC review and corrective action tracking.
- IWx data entry shadowing, including documentation standards, system workflow, and data quality review.
- Ongoing technical support tailored to DuPage County's operational needs.

Training Topics and Learning Objectives

- Common Illinois multifamily weatherization deficiencies.
- Building science fundamentals.
- Multifamily assessment procedures.
- Proper retrofit measure selection.
- TREAT model interpretation.
- Combustion safety considerations.
- Air sealing methodologies.
- Mechanical system review.
- Ventilation and indoor air quality considerations.

- Work scope verification.
- Quality assurance and quality control inspection procedures.
- Compliance documentation standards.
- IWx data entry and documentation quality control.

3. Project Oversight and Communication

CEDA shall support project oversight and communication for the second building through:

- Review of project requirements, funding requirements, and compliance standards.
- Regular project updates, milestone reporting, and issue resolution support.
- Coordination support between stakeholders, contractors, agency staff, and field personnel.
- Ad hoc technical assistance, on-site troubleshooting, and follow-up review as needed.
- Support for documentation, compliance tracking, and quality assurance processes.

4. Final Findings and Recommendations Report

At the conclusion of the Level 2 engagement, CEDA will prepare a written report summarizing the observations, findings, and recommendations developed through the shadowing, technical assistance, and project oversight process.

The final report may include:

- Summary of observed intake, assessment, WIP, final inspection, and IWx data entry workflows.
- Identification of strengths, gaps, and opportunities for process improvement.
- Technical findings related to scope development, field implementation, QA/QC, and documentation.
- Recommendations for improving project coordination, compliance readiness, workflow efficiency, and quality assurance.
- Lessons learned for future multifamily weatherization projects.
- Suggested next steps for continued agency capacity building.

5. Additional Consultant Support Services

Due to the expanded Level 2 training model, additional consultant support services may be required to fully support the second building. Additional support services may include:

- Expanded on-site project management.
- Additional field inspection shadowing + training.
- Extended stakeholder coordination meetings
- Additional training sessions – Specialized per Agency request
- Supplemental TREAT modeling analysis.
- Follow-up QA/QC inspection shadowing + training.
- Additional reporting and compliance documentation.

DELIVERABLES

CEDA will provide the following deliverables as part of this Level 2 proposal:

- Level 2 project plan including anticipated shadowing areas, roles, and coordination expectations.
- Regular progress updates with compliance tracking, issue identification, and recommendations for improvement

- Technical assistance notes and documentation support related to assessment, WIP, final inspection, and IWx data entry workflows.
- TREAT modeling report and related recommendations as applicable to the building scope.
- Final findings and recommendations report summarizing observations, lessons learned, technical findings, and recommended process improvements.
- Documented training participation and shadowing activities, as applicable.

SOLE SOURCE JUSTIFICATION

CEDA is uniquely positioned to provide this Level 2 multifamily weatherization training and technical assistance because the sole source justification identifies CEDA as the only Community Action Agency in Illinois with the requisite technical expertise and proven capacity to complete multifamily weatherization projects in compliance with U.S. Department of Energy standards.

The sole source justification further states that CEDA maintains a dedicated and credentialed multifamily technical team, has demonstrated successful implementation of more than 100 multifamily weatherization projects, regularly conducts ASHRAE-compliant energy modeling using advanced software such as TREAT, and possesses the tools, testing equipment, and experience necessary to support complex occupied multifamily buildings.

This Level 2 proposal relies on those qualifications to support DuPage County with applied shadowing, technical review, project oversight, and findings/recommendations reporting for the second College Park Apartments building.

COMPENSATION AND PAYMENT TERMS

CEDA proposes a total Level 2 proposal amount of \$104,000.00 for the second building located at 942-948 College Blvd, Addison, Illinois. This proposed amount reflects the Level 2 scope, including structured agency shadowing, technical oversight, training, project management, TREAT modeling support, reporting, and reimbursable support for the second building.

Expanded Services Category	Estimated Cost	Percentage
Expanded Technical Expertise & Compliance Oversight (Shadowing, Training and Reporting)	\$25,500	25%
Additional TREAT Modeling Services and associated preparation, oversight and review	\$11,000	11%
Expanded Level 2 Training & Technical Assistance (Intake, Assessment & OCA Submittal)	\$22,000	21%
Expanded Level 2 On-Site Monitoring & QA/QC (Shadowing, Training and Reporting)	\$18,000	17%
Consultant Hours & Project Management (Shadowing, Training and Reporting)	\$23,000	22%
Additional Reporting & Documentation	\$2,000	2%
Travel, Mileage, Lodging & Reimbursables	\$2,500	2%
Total Level 2 Proposal Amount	\$104,000.00	

**All reimbursable expenses shall be pre-approved by DuPage County prior to billing unless deemed necessary for urgent compliance, scheduling, or operational purposes.*

Monthly Invoicing Based on Milestones and Deliverables

CEDA intends to invoice DuPage County monthly, corresponding with the completion of specific milestones and deliverables. Each invoice will reflect the percentage of work completed during the month, ensuring that payments are directly tied to project progress.

- **Transparency:** Clear documentation of progress and associated costs.
- **Accountability:** Regular updates and reviews to keep the project on track.
- **Cash Flow Management:** Predictable payment schedules for both parties.

REIMBURSABLE EXPENSES

If additional on-site project management or expanded field support is required outside the originally anticipated scope, the following reimbursable costs *may* apply:

Expense Category	Method
Technical Consulting Services	Hourly
Project Management Services	Hourly
Field QA/QC & Technical Monitoring	Hourly
TREAT Energy Modeling Services	Hourly
Mileage Reimbursement	IRS Standard Mileage Rate
Lodging	Actual Cost
Parking/Tolls	Actual Cost
Per Diem (if applicable)	Actual Cost
Additional Modeling/Revisions	Hourly

**All additional expenses shall be pre-approved by DuPage County prior to billing unless deemed necessary for urgent compliance, scheduling, or operational purposes.*

TERMS AND CONDITIONS

All services performed under this proposal shall be billed at a standardized rate per hour unless otherwise mutually agreed upon in writing by both parties. Actual reimbursable expenses including mileage, lodging, parking, and other approved travel-related costs shall be invoiced at cost, and corresponding documentation can be provided at the request of the agency.

All original terms and conditions contained within original Proposal and any agreement executed between DuPage County and CEDA shall remain in full force and effect unless specifically modified herein.

Any additional services requested beyond the scope of this proposal may require a separate amendment or written authorization.

ACCEPTANCE

This Proposal, together with any mutually agreed upon terms and conditions, constitutes the understanding between the parties. Any modifications must be made in writing and signed by both parties.

**Community and Economic Development Association of Cook
County (CEDA)**

DuPage County

Signature: _____

Signature: _____

Date: _____

Date: _____

Name (Print): _____

Name (Print): _____

Title: _____

Title: _____