

## Request for Proposal (RFP) for Contractor

The Texoma Council of Governments (TCOG) seeks a qualified contractor to assist the Low-Income Energy Assistance Program (LIHEAP) in the installation of appropriate measures under the Comprehensive Energy Assistance Program (CEAP) grant awarded through the Texas Department of Housing and Community Affairs (TDHCA. Bids must include the following required services:

**I. State of Qualifications**

A competent contractor will possess experience administering federally-funded housing projects. Proposals must disclose past clients, types of programs administered, and resumes of all employees who might provide technical assistance under winning contract.

**II. Scope of work**

TCOG is a non-profit organization that operates/administers a Comprehensive Energy Assistance Program (CEAP) and a Weatherization Assistance Program (WAP) in 7 Counties in the State of Texas. THE CEAP Program provides utility assistance to low-income families, as well as occasional work in clients heating/cooling units. The WAP Program reduces energy cost for low-income households by increasing the energy efficiency of their homes, while ensuring their health and safety. Both programs prioritize services to the elderly, people with disabilities, and families with children. The Agency's professionally trained staff will use advanced diagnostic equipment to determine the most cost-effective measures appropriate for each home. Typical WAP measures may included: installing insulation; sealing ducts tuning and repairing heating and cooling systems; mitigating air infiltration; and reducing electric base load consumption. Proposers must describe tasks they would perform to comply with above administrative duties.

**III. Proposed Cost of Services**

Your Proposal must include your estimated cost for each activity identified in the Bid Sheet within this document.

**IV. Evaluation Criteria**

Proposals will be evaluated and ranked according to the following criteria:

Criteria	Proposal Points
Price	50
Financial Resources	10
Technical Resources	10
Background and Experience	15
References	15
<b>Total</b>	<b>100</b>

**V. Deadline for Submission**

Proposals will be accepted no later than July 30 at 1117 Gallagher Dr. Suite 200. Sherman, TX 75090. Bids will need to be in a "Marked Envelope" with company name.

**better leaders building better lives™**



## **TEXOMA COUNCIL OF GOVERNMENTS**

### **Solicitation for Low-Income Energy Assistance Contract**

#### **PROGRAM DESCRIPTION:**

TEXOMA COUNCIL OF GOVERNMENTS is soliciting bids from experienced, Heating and Air Contractors, Experience is relative to the installation of federally eligible Weatherization Assistance Program (WAP) energy conservation and home preservation measures in a (7) county area including, **COLLIN, COOKE, DENTON, FANNIN, GRAYSON, HUNT, AND ROCKWALL**, counties.

The Low-Income Energy Assistance Program is operated under the rules, regulations, and requirements promulgated by the Department of Energy (10CFR440) and by the state-funding agency, Texas Department of Housing and Community Affairs (TDHCA). Work performed and measures installed must meet all TDHCA standards and be in full compliance with applicable program guidelines and federal, state and local codes.

#### **Description of Work: HVAC (Must be Licensed, Must Submit Proof of License)**

Heating and Cooling crisis assistance can be provided to person(s) who have already lost service or are in immediate danger of losing service under conditions under TAC Rule 6.310

Heating/Cooling Program Coordinator will either schedule agency staff/procured contractor to perform an initial assessment to include the following:

#### **Assessment Fee will cover the following:**

- Appliance Information (as required by agency assessment form)
- Picture documentation to support assessment and provide support documentation of heating/cooling issue
- Brief written diagnosis of the issue to include suggested repair/replacement action to address inoperable appliances.
- Necessary documentation to ensure proper sizing
- Upon completion of the initial assessment of the agency staff or contractor will provide the assessment to the Heating/Cooling coordinator

#### **Review and create Work Order**

- Heating and cooling program coordinator will review work assessment to determine if the suggested repair/replacement action is allowable & provides the best solution to meet the program focus/requirement(s).
- Once Suggested repair/replacement scope is determined & approved a work order will be created
- Created work orders will be provided to a procured contractor



#### Contractor Responsibility

- Contractor completes work scope identified on each client's respective work order.
- Any additions or changes from the original work order must be pre-approved by the Heating & Cooling Coordinator
- After the completion of work the procured contractor must submit the following to the CEAP Heating & Cooling Coordinator:
  - Invoices (to align with procured pricing)
  - Pictures of completed Work Scope
  - Necessary sizing documentation to support sizing of complete system replacements.
  - AHRI Rating or Energy-star Certification for any complete system replacements

#### Inspection/Client Follow-Up

- Agency staff will either conduct an onsite inspection or follow-up with a phone call to interview client to ensure the heating/cooling issue is resolved.
- Heating & Cooling Coordinator will review submitted invoice, pictures, and documentation to ensure identified work scope was performed & ensure pricing aligns with procurement.
- Billing Template will be provided to procured contractor to submit request for payment

#### Payment Processing

- Heating and Cooling Coordinator will code/process invoice & submit to Accounting Department for Payment- Turn around for payment can range up to 45 days.



**Bidders Experience & Integrity (15 Points)**

1. **Years of Experience** (3 points will be awarded for each year of experience to a maximum of 15 points)

\_\_\_\_\_ Number of years experience you/your company has in Heating and Air Conditioning work.  
Please attach information, which can be used to verify your experience

**References (15 Points)**

2. **Record of Past Performance**

List the below names, addresses and phone numbers of 3 previous clients as references for whom/who your firm has performed Heating and Air Construction in the past 12 months. (Maximum of 15 point) No points will be awarded for references, which cannot be verified, or who indicate that work was performed or staff conduct was unsatisfactory. (5pts will be awarded for each listed reference)

Reference Name	Address	Phone Number

Additional Optional References: (Will only be called if we cannot contact the three references listed above)

Reference Name	Address	Phone Number



**Technical Resources (10 Points)**

1. List individuals who will be personally either supervising or installing HVAC related measures on homes.  
(5 Points max for each individual listed with experience) Please indicate "Yes" or "No"

**Name #1:** \_\_\_\_\_

- |    |   |       |       |
|----|---|-------|-------|
| a. | Are you familiar with Local IRC Codes for Heating and Air Conditioning  | YES   | NO    |
|    |   | _____ | _____ |
| a. | Do you have Experience measuring home and following Manual J Guidelines for sizing new HVAC Equipment?            | YES   | NO    |
|    |   | _____ | _____ |
| b. | After work is completed, will you leave all owner's manuals, documentation of installation procedures for client? | YES   | NO    |
|    |   | _____ | _____ |
| c. | Will you evaluate the HVAC's system's air balance by measuring the supply and return ducts?                       | YES   | NO    |
|    |   | _____ | _____ |

**Name #2:** \_\_\_\_\_

- |    |   |       |       |
|----|---|-------|-------|
| a. | Are you familiar with Local IRC Codes for Heating and Air Conditioning  | YES   | NO    |
|    |   | _____ | _____ |
| b. | Do you have Experience measuring home and following Manual J Guidelines for sizing new HVAC Equipment?            | YES   | NO    |
|    |   | _____ | _____ |
| c. | After work is completed, will you leave all owner's manuals, documentation of installation procedures for client? | YES   | NO    |
|    |   | _____ | _____ |
| d. | Will you evaluate the HVAC's system's air balance by measuring the supply and return ducts?                       | YES   | NO    |
|    |   | _____ | _____ |



### Financial Resources (10 points)

- |  | YES   | NO    |
|--|-------|-------|
| 1. Are you willing to provide proof of the required general liability insurance? (2 pts.)  | _____ | _____ |
| 2. Can you provide documentation that you have a minimum line of credit of at least \$10,000 for up to 90 days?<br>If yes, attach documentation? (2 pts.)  | _____ | _____ |
| 3. Are you willing to wait 45 days after final inspection to receive payment by mail to address provided by sub-contractor?<br>(2 pts.)  | _____ | _____ |
| 4. List two trade references that you or your firm has purchased materials from within the past 12 months. The following two questions will be asked of each reference. No points will be awarded if references cannot be contacted, so you may list additional references under the optional section. |       |       |

QUESTION 1 – “Would you characterize this firm (or individual) to be honest, fair and responsible?” (Please answer below) (1 pt.)

QUESTION 2 – “Have you, or would you, extend credit to this individual? (1 pt.)

	Name	Address		Phone #
Reference #1	_____			
Reference #2	_____			
Optional #1	_____			
Optional #2	_____			

#### Reference # 1 Answers

Question # 1:    Yes ☐    No ☐    Comments: \_\_\_\_\_

\_\_\_\_\_

Question # 2:    Yes ☐    No ☐    Comments: \_\_\_\_\_

\_\_\_\_\_

#### Reference # 2 Answers

Question # 1:    Yes ☐    No ☐    Comments: \_\_\_\_\_

\_\_\_\_\_

Question # 2:    Yes ☐    No ☐    Comments: \_\_\_\_\_



### Price Scoring 50 Points

1. Attached you will find a blank form for “Proposed” Labor and Material work specifications to be considered for evaluation with this bid.
2. Fill out each Line item with an “estimate” of what your company would charge to complete the desired work scope outlined in the description of work.
3. Description of the work is listed within the price sheet.

### (For Agency Use Only)

**Material Costs (MAX 25 PTS).** The Lowest TOTAL material bid will receive 25 points. Each additional bid will receive points by dividing it into the lowest bid then multiplying that a factor times 25 Points.

Lowest Bid \_\_\_\_\_  
This Bid \_\_\_\_\_  
Equals \_\_\_\_\_ x 25 pts. = \_\_\_\_\_ pts.

**LABOR COSTS (MAX. 25 PTS.)** The lowest total labor bid will receive 20 points. Each additional bid will receive points by dividing it into the lowest bid and then multiplying that a factor times 20 points.

Lowest Bid \_\_\_\_\_  
This Bid \_\_\_\_\_  
Equals \_\_\_\_\_ x 25 pts. = \_\_\_\_\_ pts.

**TOTAL MATERIAL & LABOR BID POINTS (MAX. 50 PTS.)** \_\_\_\_\_ PTS

## Low-Income Energy Assistance (LIHEAP)

All Materials must meet or exceed 10 CFR 440 Appendix A to Part 440  
Standards for Weatherization Materials, 2012 TDHCA Material Installation

### (Heating & Air Conditioning)

HVAC	HVAC	EACH	ASSESSMENT FEE	\$ -	\$ -	\$ -	INCLUDES TRIP CHARGE, EVALUATION OF UNIT, MEASUREMENTS. ETC.
HVAC	HVAC	EACH	NON-PROGRAMMABLE THERMOSTAT	\$ -	\$ -	\$ -	
HVAC	HVAC	EACH	PROGRAMMABLE THERMOSTAT	\$ -	\$ -	\$ -	
HVAC	HVAC	EACH	5,000K-10,000K BTU WU	\$ -	\$ -	\$ -	110V
HVAC	HVAC	EACH	10,500K-18,000K BTU WU	\$ -	\$ -	\$ -	110V-220V
HVAC	HVAC	EACH	18,500K-24,000K BTU WU	\$ -	\$ -	\$ -	110V-220V
HVAC GAS FURNACE ONLY 80%	HVAC	EACH	50K BTU- 125,00 BTU- ALL SIZES	\$ -	\$ -	\$ -	INCLUDES EVERYTHING RELATED TO INSTALL, PAD, FLOATS, DISCONNECT, DRIP PAN, ETC.
HVAC GAS FURNACE ONLY 90%	HVAC	EACH	50K BTU- 125,00 BTU- ALL SIZES	\$ -	\$ -	\$ -	INCLUDES EVERYTHING RELATED TO INSTALL, PAD, FLOATS, DISCONNECT, DRIP PAN, ETC.
15-16 SEER AC W/ 80% GAS FURN COMPLETE SYSTEM REPLACEMENT	HVAC	EACH	1.5-5 TON AC/80% FURN. COMP- ALL SIZES	\$ -	\$ -	\$ -	INCLUDES EVERYTHING RELATED TO INSTALL, PAD, FLOATS, DISCONNECT, DRIP PAN, ETC.
15-16 SEER AC W/ 90% GAS FURN. COMPLETE SYSTEM REPLACEMENT	HVAC	EACH	1.5-5 TON AC 90% FURN. COMP- ALL SIZES	\$ -	\$ -	\$ -	INCLUDES EVERYTHING RELATED TO INSTALL, PAD, FLOATS, DISCONNECT, DRIP PAN, ETC.
15-16 SEER HEAT PUMPS COMPLETE	HVAC	EACH	1.5- 5 TON HP COMP.	\$ -	\$ -	\$ -	INCLUDES EVERYTHING RELATED TO INSTALL, PAD, FLOATS, DISCONNECT, DRIP PAN, ETC.
HVAC CONDENSERS	HVAC	EACH	HVAC CONDENSERS COMPLETE 15 SEER OR GREATER	\$ -	\$ -	\$ -	INCLUDES EVERYTHING RELATED TO INSTALL, PAD, FLOATS, DISCONNECT, DRIP PAN, ETC.
HVAC AIR HANDLER (INCLUDES COIL)- ELECTRIC	HVAC	EACH	HVAC AIR HANDLER	\$ -	\$ -	\$ -	ALL SIZES



HVAC EVAPORATIVE COIL	HVAC	EACH	HVAC EVAPORATIVE COIL	\$ -	\$ -	\$ -	ALL SIZES
HVAC FAN MOTOR	HVAC	EACH	ECM FAN MOTOR	\$ -	\$ -	\$ -	ALL SIZES
HVAC BLOWER MOTOR	HVAC	EACH	HVAC BLOWER MOTOR	\$ -	\$ -	\$ -	ALL SIZES
HVAC TUNE-UP (CLEAN)	HVAC	EACH	HVAC- CLEAN (SERVICE ONLY)- INLCUDES ATTIC SYSTEMS	\$ -	\$ -	\$ -	CLEANING EVAPORATIVE COIL, CONDESNING COIL, BLOWER WHEEL (SQUIRREL CAGE), LUBRICATING MOTORS
HVAC UNIT CHARGE- R-22	HVAC	EACH	CHECK/ ADJUST/ RECOVER COOLANT PRESSURES- INCLUDES UP TO 12LBS OF FREON	\$ -	\$ -	\$ -	MUST VERIFY SUPERHEAT, SUBCOOLING
HVAC UNIT CHARGE- R410A	HVAC	EACH	CHECK/ ADJUST/ RECOVER COOLANT PRESSURES- INCLUDES UP TO 12LBS OF FREON	\$ -	\$ -	\$ -	MUST VERIFY SUPERHEAT, SUBCOOLING
HVAC UNIT CHARGE R407C	HVAC	EACH	CHECK/ ADJUST/ RECOVER COOLANT PRESSURES- INCLUDES UP TO 12LBS OF FREON	\$ -	\$ -	\$ -	MUST VERIFY SUPERHEAT, SUBCOOLING
HVAC COMPONENTS	HVAC	EACH	HOURLY CHARGE TO COVER UNLISTED ITEMS (MUST INCLUDE AMOUNT OF HOURS FOR REPAIR)	\$ -	\$ -	\$ -	INCLUDES RELAYS, CONTACTORS, FUSES, TRANSFORMERS, ANYTHING ELECTRICAL WITHOUT A REPLACEMENT
HVAC COMPONENTS	HVAC	EACH	TXV VALVE	\$ -	\$ -	\$ -	ALL SIZES
HVAC COMPONENTS	HVAC	EACH	LINE-SET (COPPER)	\$ -	\$ -	\$ -	ALL SIZES



**Contractor Certification**

Contractor's Name: \_\_\_\_\_

Certification Regarding Debarment, Suspension, and Other Responsibility Matters  
In Primary Covered Transactions

1. The prospective contractor certifies to the best of its knowledge and belief, that it and its principals:

- a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
- b. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction;
- c. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- d. Are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, or local) with commission or any of the offense enumerated in paragraph (1)(b) of this certification; and
- e. Have not within a three-year period preceding this application/proposal had one or more public transactions (Federal, State, or local) terminated for cause or default.

2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Name and Title of Authorized Representative: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_