

APPENDIX

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STEP-BY-STEP PROCESS TO PROCUREMENT CHECKLIST

- Determine what you will be procuring.
- Establish timeframe for the procurement(s).
- Identify the lead individual within the organization that will handle the procurement(s).
- Prepare general Request for Quotations (RFQ) instructions.
- Prepare specifications and price quote sheets.
- Advertise the solicitation.
- Conduct bidders' conference.
- Receive proposals/bids/quotations.
- Evaluate proposals/bids/quotations.
- Select vendor(s)/contractor(s).
- Establish solicitation file.
- Enter into Agreements with vendor(s)/contractor(s), as appropriate.

This checklist helps the agency organize the procurement process.

Details regarding each step are located in the *Step-by-Step Process to Procurement* document.

Subgrantees should direct any questions to their Grantee office; Grantees may direct questions to their respective DOE Project Officer.

CONTRACTOR APPLICATION/INFORMATION FORM

Please Note: If applicable, copies of your Registrar of Contractor's License and local tax licenses must accompany this application. If qualified, also include a copy of your certificate from a minority and/or woman-owned business program. Please ask your insurance agent to submit a copy of your Certificate of Insurance and Bonding.

PLEASE PRINT OR TYPE

DATE: _____

Business Name: _____

Owner/Representative: _____

Business Address: _____
Number Street City Zip Code

Mailing Address: _____
Number Street City Zip Code

Area Code/Phone Numbers: _____
Office Fax Mobile

Federal I.D. #: _____

If not incorporated, Social Security #: _____

Privilege Tax #: _____ Expiration Date: _____

Registrar of Contractors #: _____ Expiration Date: _____

Classification Number: _____ Expiration Date: _____

Do you have a General Contractor's License in this area? Yes No

Are you registered as a small, minority business, small women's business enterprise, or located in a U.S. Department of Labor (DOL) designated Labor Surplus Area? Yes No

If your answer is "YES," please submit a copy of each applicable certification and/or link to DOL spreadsheet and detail the applicability.

This form can be used to build a contractors' list prior to issuing the Request for Quote (RFQ).

Encourage contractors that contact the agency about potential work to complete the form so you know they have the general requirements met (many of the pieces requested will be required in the RFQ).

Please identify the type(s) of construction you have performed in the last year and include examples of size and scope (e.g., completed 50 single family weatherization projects):

Home Remodeling

Specify relevant experience:

Home Building

Specify relevant experience:

Major Construction

Specify relevant experience:

Please list all education and training the vendor has had specific to building science and weatherization.

Training

Date

_____	_____
_____	_____
_____	_____
_____	_____

Please list all Certifications that you have obtained related to building science or weatherization.

_____	_____
_____	_____
_____	_____
_____	_____

List two major suppliers from whom you purchase most of your supplies:

Name

Address

City

Area Code/Phone

_____	_____	_____	_____
_____	_____	_____	_____

List two financial institutions (banks, savings, and loan association, etc.) with whom you have established credit:

<i>Name</i>	<i>Address</i>	<i>City</i>	<i>Area Code/Phone</i>
_____	_____	_____	_____
_____	_____	_____	_____

How long have you been in the contracting business? _____
Years *Months*

Provide at least three project references we can contact to verify experience/quality of work.:

<i>Name</i>	<i>Address</i>	<i>City</i>	<i>Area Code/Phone</i>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Approximately how many jobs have you completed as a general contractor? _____

What is the smallest/value job you have completed?

What is the largest/value job you have completed?

How many employees do you employ full-time? _____

Have you ever worked for **(INSERT AGENCY NAME)**?

Circle One: Yes No

If answer is Yes, when and where? _____

What type of job? _____

THE UNDERSIGNED CONTRACTOR CETIFIES THAT ALL INFORMATION GIVEN HEREIN IS SUBSTANTIALLY CORRECT AND FURTHER AGREES:

- Contractor License Class and bond are current, and the undersigned contractor agrees to maintain in current status all licenses and bonds as required by the contracting agency.

- That the work be performed in accordance with the Agency and Department of Energy Standard Work Specifications and requirements.
- That if the work performed by the contractor is found to be unsatisfactory by the administering agency or if contract relations between the contractor, homeowner or other parties are found to be unsatisfactory, that the administering agency may remove the contractor's name from the approved list, with such accompanying publicity as it deems necessary.
- The contractor will abide by the federal regulations pertaining to equal employment opportunity.
- That the work will be done in conformance with all appliance codes and zoning regulations.
- Upon award of bid/contract, a Certificate of Insurance and Worker's Compensation Certificate will be sent to *(INSERT AGENCY NAME)*.

Contractor Signature: _____ Date: _____

CONTRACTOR INFORMATION REGARDING DEBARMENT AND SUSPENSION

CONTRACTOR'S NAME: _____

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 29 CFR Part 98, Section 98.510, Participants' responsibilities. The regulations were published as Part VII of the May 26, 1988, Federal Register (pages 19160-19211).

Some agencies request this information beforehand; others include as part of the RFQ submission.

(Before Signing Certification, Please Read)

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; 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;
 - c. Are not presently indicted for or otherwise criminally or civilly charged by a government entity (Federal, State, or local) with commission of any of the offense enumerated in paragraph (1)(b) of this certification; and
 - d. 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 any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

NAME AND TITLE OF AUTHORIZED REPRESENTATIVE

Name

Title

Signature

Date

REQUEST FOR QUOTATION APPLICATION INSTRUCTIONS

WEATHERIZATION SERVICES/MATERIALS

(INSERT AGENCY NAME)
(INSERT AGENCY ADDRESS)
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INTRODUCTION

I.1. PURPOSE OF THIS REQUEST FOR QUOTATION

(INSERT AGENCY NAME) is soliciting quotations for weatherization materials and services.

I.2. BACKGROUND

I.2.1. Overview of (INSERT AGENCY NAME) Weatherization Assistance Program

(INSERT AGENCY NAME) is a non-profit organization that operates/administers a weatherization program in (INSERT COUNTY NAMES) counties. The U.S. Department of Energy's (DOE) Weatherization Assistance Program (WAP) reduces energy costs for low-income households by increasing the energy efficiency of their homes, while ensuring their health and safety. The Program prioritizes services to the elderly, people with disabilities, and families with children. The Agency's professionally trained weatherization crews use computerized energy audits and advanced diagnostic equipment to determine the most cost-effective measures appropriate for each home. Typical measures may include installing insulation; sealing ducts; tuning and repairing heating and cooling systems; mitigating air infiltration; and reducing electric base load consumption.

I.3. MAJOR OBJECTIVES REQUEST FOR QUOTATION

The major objectives of the solicitation are to:

- 1) Identify vendors and/or contractors that will provide weatherization materials/services for the Agency.
- 2) Ensure that all materials and/or services meet Agency and DOE's Standard Work Specifications (SWS) and requirements.
- 3) Ensure that all materials and/or services are provided in the timeframe established by the Agency.

I.4. OVERSIGHT AND MANAGEMENT

I.4.1. Oversight

Oversight of the Agreement will be exercised by (INSERT THE POSITION TITLE OF THE AGENCY STAFF PERSON THAT IS RESPONSIBLE FOR OVERALL MANAGEMENT OF THE AGREEMENT).

I.4.2. Liaison

A liaison, (INSERT AGENCY COORDINATOR OR DESIGNEE), will serve as the contact point for the vendor/contractor. The liaison will coordinate the services and serve as the communication link between the Agency and the vendor/contractor.

I.5. TYPE OF AGREEMENT AND PAYMENT SCHEDULE

This agreement will be on a cost reimbursement or fixed price basis depending upon the material and/or service being procured. There will be an initial 1-year agreement period with four 1-year extensions available. Each of these will be priced separately and exercised at the Agency’s discretion. Payments will be made after completion of work and/or delivery of services, inspection, and acceptance by the Agency.

I.6. PROCUREMENT SCHEDULE KEY DATES

Following are the estimated key dates in the schedule for this procurement:

Request for Quotations Issued	(ENTER DATE)
Bidders Conference	(ENTER DATE)
Modifications to Request for Quotations, if applicable	(ENTER DATE)
Quotations due and opened	(ENTER DATE)
Quotations Evaluations	(ENTER DATE)
Agreement(s) Signed	(ENTER DATE)

(INSERT AGENCY NAME) reserves the right to proceed under a modified version of this schedule.

II. (INSERT AGENCY NAME) QUOTATIONS REQUIREMENTS

II.1. INQUIRIES

All inquiries concerning this Request for Quotations (RFQ) will be submitted as follows:

(INSERT INDIVIDUAL'S NAME)
(INSERT AGENCY NAME)
(INSERT EMAIL ADDRESS)

During the procurement process, prospective Offerors shall contact only the individual named above.

In no case should oral communications take precedence over written communications. Only written communications shall be binding on the RFQ.

(INSERT AGENCY NAME) assumes no responsibility for representations concerning conditions made by its Officers or Staff prior to the execution of an agreement unless such representations are specifically incorporated into the RFQ by subsequent official written Addendum(s). Oral conversations pertaining to modifications or clarifications of the RFQ shall not be considered part of the RFQ unless confirmed in writing by official written Addendum(s).

II.2. BIDDERS CONFERENCE

A Bidders Conference will be held at (INSERT AGENCY NAME AND ADDRESS or ELECTRONIC PLATFORM) on (ENTER DATE AND TIME). All potential Offerors will be required to attend the Bidders Conference. All instructions for the RFQ will be provided at the Bidders Conference. All questions will be answered at the Bidders Conference.

II.3. DATE, TIME AND PLACE TO SUBMIT QUOTATIONS

Upload/Receipt of file labeled “Weatherization RFQ” shall be provided and addressed to:

(INSERT INDIVIDUALS NAME)

(INSERT AGENCY NAME)

(INSERT ADDRESS -- physical and/or electronic)

Quotations shall be accepted until *(INSERT DATE AND TIME AND SPECIFY DELIVERY OPTIONS)*.

It is the sole responsibility of prospective offerors to take notice of the date and time that quotations are due, and to ensure their submittals are received prior to the due date and time. Late quotations shall not be accepted.

II.4. QUOTATIONS SUBMISSION

The *(INSERT AGENCY NAME)* Information/Application Form must be current and on file with *(INSERT AGENCY NAME)* or submitted with Quotation. The format for the quotations specified in each of the Attached Specifications and Pricing Quotes. All information provided in response to this RFQ is subject to verification. Misleading and/or inaccurate information shall be grounds for disqualification at any stage in the procurement process.

The quotations *(INSERT HARD COPY OR ELECTRONIC)* package consisting of the signed quotations containing all required information, shall be delivered on or before the quotation’s due date/time to:

Contact Name: *(INSERT NAME IDENTIFIED ABOVE)*

Address: *(INSERT ELECTRONIC and/or PHYSICAL ADDRESS)*

Request for Quotations: *(INSERT AGENCY IDENTIFIED TITLE)*

Quotations Due Date/Time: *(INSERT DATE AND TIME)*

Location: *(INSERT AGENCY ADDRESS)*

Submission of a signed quotation(s) is acknowledgment and acceptance of all terms and conditions of the solicitation. *(INSERT AGENCY NAME)* reserves the right to reject all quotations.

II.5. QUOTATIONS OPENING

Quotations shall be opened at the time and place designated in this document. The name of each Offeror shall be read publicly and recorded. Prices will not be read. Quotations are not subject to public inspection.

II.6. MINIMUM OFFEROR QUALIFICATIONS

The Offeror shall have a minimum of *(LIST - years of experience, houses completed, etc.)* , if applicable.

II.7. INTEGRITY OF QUOTATIONS

By signing a quotation(s), an Offeror affirms that s/he has not given any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to an (INSERT AGENCY NAME) member in connection with the submitted quotations. Failure to sign the quotations, or signing it with a false statement, shall void the submitted quotations or any resulting agreements, and the Offeror shall be removed from all supplier/contractor lists.

II.8. QUOTE APPLICABILITY

Offeror must substantially conform to the terms, conditions, specifications, and other requirements found with the text of the Specifications and Pricing Quotes. All previous agreements or other documents, which have been executed between the Offeror and (INSERT AGENCY NAME) are not applicable to this Request for Quotations or any resultant agreement.

II.9. LICENSES

Offerors shall maintain in status all federal, state, and local licenses and permits required for the operation of business conducted by the Offeror.

II.10. PREFERENCES

Preference will be given to each of the following:

- Minority firms.
- Women Business Enterprises; and
- Labor Surplus Area Firms.

II.11. DOCUMENTATION OF INSURANCE

Prior to the implementation date of the agreement, the Offeror shall provide (INSERT AGENCY NAME) with documentation evidencing insurance for a minimum (INSERT STATE REQUIREMENTS) professional and equipment liability. The Offeror shall name (INSERT AGENCY NAME) as an additional insured party to address application and equipment damage that occurs during agreement or service operations.

II.12. ECONOMY OF PRESENTATION

Quotations must address the specific RFQ requirements. All items requested by the RFQ shall be answered clearly and concisely. Additional promotional materials that are not responsive to a specific requirement shall not be included in the quotation's response package.

II.13. COSTS FOR PREPARATION OF QUOTATIONS

No payments shall be made to cover costs incurred by any Offeror in the preparation or submission of the quotations, nor any other associated costs.

II.14. RFQ MODIFICATIONS

(INSERT AGENCY NAME) shall prepare written Modifications(s) if needed. All modifications to this RFQ shall be prepared by (INSERT AGENCY NAME) and formally issued to potential bidders through (INSERT PROCESS). Addenda shall be issued not later than the date specified in the schedule. Written addenda shall serve to amend the RFQ documents accordingly.

II.15. CERTIFICATION OF INDEPENDENT PRICE DETERMINATION

By submission of a response to this RFQ, the Offeror certifies that in connection with this procurement:

- Prices in the quotations have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any competitor.

Each person signing the quotations certifies either that:

- He or she is the person in the Offeror's organization responsible for the decision as to any prices being offered herein, and that he or she has not participated in, and shall not participate in, any action contrary to the requirements of this document.
- He or she is not the person in the Offeror's organization responsible for the decision as to any prices being offered herein, but that he or she has been authorized to act as agent for the persons responsible for such decision. Furthermore, those people have not participated in, and shall not participate in, any action contrary to the requirements of this document.

Any offer made in the submitted quotations, and any clarifications to the quotations shall be signed by an officer of the offering firm or a designated agent empowered to bind the firm in an agreement.

II.16. QUOTATIONS EVALUATION AND AWARD(S)

All quotations submitted shall be evaluated in accordance with (INSERT AGENCY NAME) criteria.

At its option, (INSERT AGENCY NAME) may accept an RFQ quotations package as written by issuing an agreement that refers to this RFQ document and the RFQ response package as written. Because (INSERT AGENCY NAME) may use this option, the Offeror shall include in their written RFQ response package, all requirements, terms, or conditions it may have, and shall not assume an opportunity will exist to add such matters after the RFQ response package has been submitted.

II.17. MISCELLANEOUS

(INSERT AGENCY NAME) reserves the right to accept or reject any part of any quotations, and to accept or reject any or all quotations without penalty. (INSERT AGENCY NAME) reserves the right to waive minor deficiencies and informalities if, in the judgment of (INSERT AGENCY NAME), the best interests of (INSERT AGENCY NAME) shall be served.

III. AGENCY AGREEMENT

INSERT AGENCY AGREEMENT FORM HERE, AS APPLICABLE

IV. QUOTATIONS CONTENT AND FORMAT

The specifications and pricing requirements *(INSERT)*.

V. QUOTATIONS EVALUATION

V.1. EVALUATION PROCESS

(INSERT AGENCY NAME) will evaluate this RFQ. (INSERT AGENCY NAME) will determine the best offer(s). Quotations must meet all the mandatory criteria for the quotations to be evaluated. (INSERT EVALUATION CRITERIA/POINTS PER CATEGORY) Quotations that are incomplete or contain significant inconsistencies or inaccuracies may be rejected by (INSERT AGENCY NAME) without further discussion.

QUOTATION SPECIFICATIONS, TRAINING COURSE EXAMPLE

Beginner Comprehensive Energy Auditor Training Course

Respondents will use the following information to develop a scope of work and a proposed timeline (20-page limit, 12-point font) including all project tasks and deliverables in the RFP. Evaluation of respondents will include criteria that the scope of work and proposed timeline is realistic, coherent, achievable and support the goals outlined here.

Type of Training & Audience

Grantee is requesting introductory training for recently hired Weatherization Assistance Program (WAP) staff, covering the **full [NREL Job Task Analysis for Single-Family Energy Auditor \(EA\)](#)**.

TIP:

Always provide links to any state-specific resources or include as attachments with the RFP/purchasing document.

Training will be attended by 50 Grantee and Subgrantee staff that have been hired by WAP within the past two years, with some having experience conducting residential retrofits. **All participants meet the prerequisites to sit for the Building Performance Institute (BPI) [Energy Auditor Exam](#).**

Standards

All training content must meet the following standards and protocols: [10 CFR 440](#); [2 CFR 200](#); U.S. Department of Energy Weatherization Program Notices and Memoranda; State of ___ Weatherization Program and Policy Manual; State of ___ Weatherization Technical Field Guide; _____ (Energy Audit Software) User Guide and related state-specific data collection forms (**ATTACH RELEVANT DOCUMENTS**).

Experience and Certifications

Training must be provided by an Interstate Renewable Energy Council ([IREC](#)) [accredited training provider](#). In addition, the designated instructor(s) must hold active [Building Performance Institute \(BPI\) Home Energy Professional \(HEP\) Energy Auditor \(EA\)](#) and [BPI HEP Quality Control Inspector \(QCI\) certifications](#). At least three years of experience training in the WAP network is preferred.

Needs Assessment and Training Goals

This training is being planned due to the turnover of multiple staff in the WAP network. Training provider must include a pre-test to help identify any sections of the Job Task Analysis (JTA) requiring special attention. Training goal is a minimum of 85% of attendees indicate in post-training evaluations that they feel prepared to take the BPI EA written and field exams.

Training Delivery

Training provider will conduct preliminary screening (preferably via online/distance learning models) to ensure participants are ready to attend core training (e.g., minimum vocabulary and building science background knowledge, basic mathematics). Training provider will suggest any recommended remedial activities/training for specific attendees, as needed. The preliminary screening is included in

the Request for Proposal (RFP), but any suggested remedial activities will be proposed and budgeted separately. The Grantee is responsible for ensuring attendees complete remedial activities as required.

Core training will be conducted in-person or online and include a mixture of classroom sessions and hands-on field work. Ideally the training will start by June 2024 and be completed by the end of July 2024.

Frequency and Length of Training

Frequency and length of preliminary screening and follow-up remedial activities are left to the discretion of the training provider. The Grantee will work with the selected training provider to adjust timeline as feasible.

Training provider will propose structure of training (e.g., one training for all attendees, several smaller groups) and length of training based on class-size limitations and estimated number of attendees. Grantee recognizes that hands-on activities typically lead to greater training retention and require lower student to instructor ratios.

Curriculum Development & Training Preparation

Training provider may use existing IREC-accredited curriculum for Home Energy Professional (HEP) EA training, provided it is customized for our state-specific standards, policies, and protocols. Grantee will review and approve curriculum prior to training on a mutually agreed-upon schedule.

Evaluation of Learning/Learner Assessment

Training provider will deliver an end-of-course assessment aligned with the learning objectives of the course. This must include a training provider-developed field exercise and a written exam at the conclusion of the training. Results will be made available to the Grantee.

Certification Testing & CEUs

Training provider will ensure attendees receive applicable BPI Continuing Education Units (CEU).

At the conclusion of the training, successful participants are expected to have obtained the knowledge needed to pass the BPI EA written and field exams. Attendees and employers will be responsible for scheduling exams.

End of Course Evaluations

Training provider will share their end of course evaluation instrument for Grantee review and revision. Training provider will provide copies and distribute the evaluation to training participants. Training provider will share consolidated responses with Grantee within 30 days of completion of training.

Training Retention Activities

No training retention activities are required for this training. Participants will take the BPI HEP EA written and field EA exams shortly after this training.

Location and Logistics

Any in-person training will be held in [INSERT CITY, STATE]. Grantee will acquire classroom and field training sites based on specifications provided by training provider.

If the training provider would like to propose an alternate site, it must be a location that minimizes travel for all participants, as feasible. For example, [CITY] is centrally located with access to a regional airport and has multiple hotels with conference rooms that would be suitable. Any location proposed by training provider is subject to Grantee approval. If proposing an alternate location, training provider is responsible for securing field site. Training provider will be required to travel to the training location for in-person training.

Grantee will manage, registration and confirming pre-requisites. Grantee will be responsible for announcement of training, participant registration and will provide a list of registrants, including existing BPI certifications and training histories, to the training provider at least one month prior to the training. Training provider will then communicate directly with registrants regarding agenda, syllabus, whether they need to bring anything to the training, etc.

Grantee will coordinate with training provider to identify a location and venue for any in-person training and will arrange a lodging block for all attendees, a training room, and meals (lunch will be provided). Attendees and training provider will be responsible for securing reservations within that lodging block and paying for lodging. Grantee will be responsible for onsite attendance tracking, notepads and pens. For online training, training provider will be responsible for tracking attendance/participation and evaluation forms.

Training provider will be responsible for training materials.

Training provider will be responsible for working with venue staff for venue-specific training needs such as audio visual and room setup and any logistical issues that arise during the training.

Training provider is encouraged to propose alternatives, as feasible, for the hands-on field portion of the training. Grantee will assist the training provider in securing a home for the field work portion as needed. Training provider must supply Grantee with required home characteristics.

Administration

The training provider will attend two 2-hour pre-training meetings (webinars): a kick-off meeting and a follow-up meeting. Grantee will provide agendas and schedule these meetings.

The training provider will provide the Grantee with a training completion report that includes attendance details for each day of the training, evaluations completed by the participants (unedited), an analysis of participant performance, summative evaluation results (final tests), and any recommendations for additional T&TA or program improvements within 30 business days of completion of the training.

Invoicing will be done at the completion of each training (if attendees are split into cohorts) or at the completion of the entire training if they go through as one group. Travel will be billed according to State guidelines (*ATTACH STATE GUIDELINES*).

QUOTATION SPECIFICATIONS, MEASURE/MATERIALS EXAMPLE

Site-Build, Single Family Attic Insulation Measure

Respondents will use the following information to develop a scope of work and proposed timeline including all project tasks and deliverables in the RFP. The contractor must maintain and have available for review evidence of all federal, state, and local licenses, certifications, and permits as required for the operation of business conducted by the Contractor. Contractor must maintain minimum required professional, equipment, and/or liability insurance per the contract values. Evaluation of respondents will include criteria that the scope of work and proposed timeline is realistic, coherent, achievable and support the goals outlined here.

Scope

The scope of this RFQ is described below and in the Measure Scope Specifics.

- All work must adhere to the requirements of the [Standard Work Specifications](#) (SWS) , as well as any local codes that apply. In the case of a conflict between the SWS and local codes, the stricter rule shall apply.
- All materials used must meet or exceed the [Environment Protection Agency \(EPA\) recovered material rule](#).
- All insulation material installations must comply with the information requirements of [16 CFR 460.17 - What installers must tell their customers](#).
- Contractor is responsible for adherence to all federal safety standards (Occupational Safety and Health Administration (OSHA), EPA, etc.) and all worker safety regulations in the local jurisdiction as required.
- Contractor must remove and dispose of all job debris related to the installation of measures in accordance with all applicable federal, state, and local requirements.
- Contractor is responsible for any damage incurred to the client's home resulting from any action by the Contractor or the contractor's personnel.
- Contractor is responsible for protecting the client's personal items during measure installation (cover clothing if accessing the attic in a closet, etc.) and cleaning any surfaces dirtied/soiled because of work performed by Contractor.
- Contractor shall leave all applicable installation and warranty literature relating to the newly installed measure(s) with the client and shall also inform the client of proper care and maintenance.
- Contractor must leave its contact information with the client in the event that a warranty issue arises.

Change Orders

- Following a signed agreement and prior to job completion, if the Contractor determines a change in the work scope is warranted, a change order request may be submitted using the appropriate form along with any necessary justifying details. The agency will consider the request and provide a response within [3 business](#) days. A written response will be provided approving the change or explaining why it is denied. No changes to the work scope shall be enacted until the change order is approved.

Project Timeline

- Within 10 business days of the closing date of this RFQ, the selected Contractor shall be notified in writing with a Notice to Proceed and a contract Agreement shall be provided for signature.
- Project commencement must begin within 30 business days of signed contract.
- Project completion must be accomplished within 30 business days of project commencement.

Final Inspections, Invoicing, & Payment

- After work completion, all work will be inspected by a Quality Control Inspector (QCI) assigned by the Agency to ensure installation satisfies both the work scope and the [Standard Work Specifications](#). Work that does not meet the minimum requirements will result in a rework order, additional costs to be borne uniquely by the Contractor. Installation Agreements shall not be deemed complete until all measures contained in the Agreement pass final inspection by a QCI and receive signature by the approved QCI.
- Contractor invoicing must provide complete details which minimally include: contract number, date of work completion, list of all measures installed, costs for each measure separated into labor and materials and total costs, efficiency of measure installed (R-value, U-value, SEER, AFUE, etc.), quantity and type of material installed (square feet, linear feet, per item, etc.), and in the case of mechanical installations the brand, model number, and serial number of installed equipment.
- Upon successful completion of the Agreement, full payment to the Contractor will be made within 30 days.

Project Scope Specifics

Housing Type:

- Site Built Single Family
- Manufactured Home
- Plex (2-4 unit)
- Multifamily # of units: _____

Location [municipality/county]: [City of Anywhere](#)

of Stories: 1 2 3 4 or more

Measure Scope Specifics (use 1 sheet per measure or measure group). Make sure to include all measures you anticipate needing from the potential contractor.

Measure Description: Add R38 cellulose insulation to main attic (2025 ft²) bringing total value to R-49, include all ancillary items as required by SWS (i.e., insulation baffles, depth markers, and utility junction flags, damming, etc.). Install air sealed and insulated attic hatch per SWS.

SWS requirements incorporated: [SWS 4.0103.2 - Accessible Attic - Loose Fill Installation](#) ; [SWS 3.0103.1 - Access Doors and Hatches](#)

Measure	Efficiency Value (R-value, AFUE, etc.)	Quantity	Estimated Cost
Insulate Attic w/Cellulose	Add R-38 (R-49 total)	2025 ft ²	\$
Seal & Insulation Existing Attic Hatch	R49 Insulation	1 each	\$
Total Measure Costs:			\$

Estimated Total Project Cost: \$

By signing this document, I affirm that all information contained herein is complete and accurate to the best of my knowledge as it pertains to the quoted cost associated with the scope of work proposed.

Responsible Signature: _____ Date: _____

EVALUATION CRITERIA, TRAINING EXAMPLE

Factors, in addition to cost, can be incorporated into the scoring. Each agency must decide **PRIOR TO ISSUING THE SOLICITATION** how they will be evaluating all offerors.

If minimum requirements have been established those requirements must be included in the solicitation. Any offerors that do not meet the minimum requirements are not evaluated (e.g., must have XXX years of experience conducting residential construction training, each trainer is BPI HEP EA and HEP QCI certified, etc.). The offerors are notified that they do not meet requirements and what requirement(s) they did not meet.

It is critical that the evaluation work papers be maintained in the Solicitation File for the procurement.

For illustrative purposes ONLY, the following is an example of how to structure bid scoring.

Cost – 30 points

Detailed Scope of Work/Timeline – 30 points

Experience/Background of Offeror – 15 points

References – 10 points

Preferences – 5 points, per category

Cost (ranked against other bidders in increments), 30 points

Met requirements, included all components, and lowest bid	30 points
Met requirements, included all components, and 2 nd lowest bid	27 points
Met requirements, included all components, and 3 rd lowest bid	24 points
Met requirements, included all components, and 4 th lowest bid	21 points
Met requirements, included all components, and 5 th lowest bid	18 points

Scope of Work/Proposed Timeline, 30 points

Provides a <i>thoroughly</i> developed Scope demonstrating comprehensive understanding of the project needs and strategies to meet the Program goals.	30 points
Provides an <i>adequately</i> developed scope of work, demonstrating understanding of the project needs and strategies to meet the Program goals.	25 points
Provides a minimally developed scope of work, demonstrating some understanding of the project needs and strategies to meet the Program goals.	20 points
Lacks the necessary details in the scope of work to demonstrate understanding of the project needs.	15 points

Experience/Background, 15 points

Demonstrates <i>fully sufficient</i> background and staffing to meet the project needs.	15 points
Demonstrates <i>adequate</i> background and staffing to meet the project needs.	12 points
Demonstrates <i>minimal</i> background and staffing to meet the project needs.	9 points

Lacks sufficient detail to determine background and staffing to meet the project needs.	6 points
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References, 10 points

3 Excellent References	10 points
2 Excellent References; 1 Good Reference	8 points
1 Excellent Reference; 2 Good References	6 points
0 Excellent References; 3 Good References	4 points

Preferences, 5 points (each qualifying category)

Minority Business (must be registered)	5 points
Women's Business (must be registered)	5 points
Labor Surplus Area (must be identified by Department of Labor)	5 points

EVALUATION CRITERIA, MEASURE/MATERIALS EXAMPLE

Factors, in addition to cost, can be incorporated in the evaluation. Each agency must decide **PRIOR TO ISSUING THE SOLICITATION** how they will be evaluating all offerors.

If minimum requirements have been established those requirements must be included in the solicitation. Any offerors that do not meet the minimum requirements are not evaluated (e.g., licensed, bonded, appropriate levels of insurance, XXX years of experience, etc.). The offerors are notified that they do not meet requirements and what requirement(s) they did not meet.

It is critical that the evaluation work papers be maintained in the Solicitation File for the procurement.

SAMPLE HOUSE

1,500 sq. foot single story home built in 1975, site built stick frame, gable roof, wood siding ranch style over crawl space with 16” on center 10” joist with no insulation, existing attic insulation of R-18, 3 ½” wall cavity no insulation, forced air natural gas furnace at 60% efficiency, 175 l/f of duct supply and return air with duct leakage of 200 cfm50, 40 gallon gas hot water heater, and single glazed wood horizontal slider windows.

CRITERIA FOR EVALUATION, COST

INSULATION QUOTATION EVALUATION SHEET						
		Offeror	Offeror	Offeror	Offeror	Offeror
Sample House Measures	Quantity	A	B	C	D	E
Attic Insulation - Blown Cellulose, bring to R-50	1,500	\$879.50	\$870.99	\$856.00	\$885.95	\$851.55
Wall Insulation - Blown Cellulose, bring to R-13	1,200	\$910.00	\$879.50	\$888.00	\$915.55	\$890.75
Floor Insulation - Batt Fiberglass, bring to R-30	1,500	\$1,435.75	\$1,465.99	\$1,453.00	\$1,490.90	\$1,461.35
Total Insulation Cost		\$3,225.25	\$3,216.48	\$3,197.00	\$3,292.40	\$3,203.65
Price includes all materials, labor, permits fees, sales taxes and RRP practices with wall insulation						
In this example, with only cost as the factor, Offeror C would be the primary contractor. If multiple contractors are used the following order of selection would be Offeror E, Offeror B, Offeror A, and last Offeror D.						

For illustrative purposes ONLY, the following are examples of criteria, other than cost, demonstrating how each criterion could be evaluated.

OFFEROR SCENARIOS THAT INCLUDES FACTORS, IN ADDITION TO COST:

Offeror A bid on insulation job with total cost of 3,225.25; 10 years’ experience; two references were excellent, and one reference was good; and is not minority, women owned or reside in a labor surplus area.

Offeror B bid on insulation job with total cost of 3,216.48; 15 years’ experience; two references were excellent, and one reference was good; and is not minority, women owned or reside in a labor surplus area.

Offeror C bid on insulation job with total cost of 3,197.00; 12 years’ experience; two references were excellent, and one reference was good; and is not minority, women owned or reside in a labor surplus area.

Offeror D bid on insulation job with total cost of 3,292.40; 2 years’ experience; three references were excellent; and is a minority business located in a labor surplus area.

Offeror E bid on insulation job with total cost of 3,203.65; 5 years’ experience; three references were excellent; and is a women owned business.

Cost (ranked against other bidders in increments) 50 points

Met requirements, included all components, and lowest bid	50 points
Met requirements, included all components, and 2 nd lowest bid	47 points
Met requirements, included all components, and 3 rd lowest bid	44 points
Met requirements, included all components, and 4 th lowest bid	41 points
Met requirements, included all components, and 5 th lowest bid	38 points

Background and Experience (ranked against other bidders in increments) 28 points

Strongest background with most experience	28 points
2 nd Strongest background and experience	25 points
3 rd Strongest background and experience	22 points
4 th Strongest background and experience	19 points
5 th Strongest background and experience	16 points

References 7 points

3 Excellent References	7 points
2 Excellent References; 1 Good Reference	6 points
1 Excellent Reference; 2 Good References	5 points
0 Excellent References; 3 Good References	4 points
Less than 3 Good References	3 points

Preferences 5 points (each qualifying category)

Minority Business (must be registered)	5 points
Women’s Business (must be registered)	5 points
Labor Surplus Area (must be identified by Department of Labor)	5 points

In evaluation of the criteria, including factors other than cost, the five offerors scored as follows:

Criteria	Offeror A	Offeror B	Offeror C	Offeror D	Offeror E
Cost	41	44	50	38	47
Background and Experience	22	28	25	16	19
References	6	6	6	7	7
Preference	0	0	0	10	5
Total Points	69	78	81	71	78

In this example, Offeror C would be the selected contractor. If multiple contractors are used, the following order of selection would be Offeror E and Offeror B (tied), Offeror D, and last Offeror A. In instances where there is a tie, the agency should determine beforehand how the agency will provide preference (e.g., any “ties” will be broken based on lowest cost or most experience).

EVALUATION EXAMPLES

BULK MATERIALS QUOTATION EVALUATION SHEET											
		Offeror A		Offeror B		Offeror C		Offeror D		Offeror E	
	Quantity	Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost	Total Cost
Insulated Pipe Wrap - roll	50	7.80	\$390.00	7.55	\$377.50	7.20	\$360.00	7.22	\$361.00	7.45	\$372.50
Foil Grip Tape - roll	24	26.77	\$642.48	27.04	\$648.96	24.95	\$598.80	25.25	\$606.00	25.78	\$618.72
Glazing Compound - 11 oz tube	36	2.22	\$79.92	2.18	\$78.48	2.10	\$75.60	2.15	\$77.40	2.12	\$76.32
Open-cell Foam Tape - 3/8" 25' roll	75	3.41	\$255.75	3.51	\$263.25	3.43	\$257.25	3.62	\$271.50	3.70	\$277.50
Duct Tape - roll	100	3.75	\$375.00	3.59	\$359.00	3.80	\$380.00	3.88	\$388.00	3.69	\$369.00
Aluminum Weatherstrip Kit- each	80	7.75	\$620.00	8.09	\$647.20	7.71	\$616.80	8.00	\$640.00	7.80	\$624.00
Vinyl Weatherstrip Kit - each	40	3.01	\$120.40	2.45	\$98.00	2.36	\$94.40	2.67	\$106.80	2.39	\$95.60
36" Door Bottom w/drip cap 1-3/8" width - each	50	4.76	\$238.00	4.80	\$240.00	4.57	\$228.50	4.50	\$225.00	4.62	\$231.00
36" Door Bottom w/drip cap 1-3/4" width - each	50	4.91	\$245.50	5.10	\$255.00	4.83	\$241.50	4.78	\$239.00	4.80	\$240.00
Oak Lowboy Threshold - each	25	7.45	\$186.25	7.33	\$183.25	7.36	\$184.00	7.41	\$185.25	7.25	\$181.25
Oak Highboy Threshold - each	50	10.55	\$527.50	10.76	\$538.00	10.31	\$515.50	10.45	\$522.50	10.25	\$512.50
Lockset/Keyed Entry - each	50	10.50	\$525.00	11.00	\$550.00	9.26	\$463.00	9.95	\$497.50	10.28	\$514.00
Mobile Home Door - 30" x 74"	15	169.75	\$2,546.25	177.45	\$2,661.75	162.21	\$2,433.15	165.00	\$2,475.00	167.75	\$2,516.25
Dryer Vent Hose - 4" 50 l/f	20	25.00	\$500.00	24.65	\$493.00	24.50	\$490.00	25.10	\$502.00	25.25	\$505.00
Dry Vent Hood - each	60	2.26	\$135.60	2.99	\$179.40	2.19	\$131.40	2.76	\$165.60	3.25	\$195.00
Water Heater Blanket - each	5	19.79	\$98.95	19.95	\$99.75	19.89	\$99.45	20.95	\$104.75	19.99	\$99.95
Furnace Heat Duct Insulation - 50' roll	30	90.00	\$2,700.00	89.75	\$2,692.50	85.12	\$2,553.60	92.50	\$2,775.00	88.75	\$2,662.50
Plastic Tie Straps - each	2,000	0.25	\$500.00	0.21	\$420.00	0.17	\$340.00	0.19	\$380.00	0.27	\$540.00
Fiberglass Blow-In Insulation - 30# bag	1,000	19.05	\$19,050.00	18.88	\$18,880.00	18.68	\$18,680.00	19.24	\$19,240.00	18.75	\$18,750.00
Fiberglass Insulation (Batts) 15" wide R-11 - roll	48	27.90	\$1,339.20	28.88	\$1,386.24	27.72	\$1,330.56	28.01	\$1,344.48	27.75	\$1,332.00
Fiberglass Insulation (Batts) 23" wide R-11- roll	48	25.80	\$1,238.40	26.03	\$1,249.44	25.88	\$1,242.24	26.25	\$1,260.00	25.85	\$1,240.80
Fiberglass Insulation (Batts) 15" wide R-19 -roll	120	21.97	\$2,636.40	22.57	\$2,708.40	22.04	\$2,644.80	22.24	\$2,668.80	22.29	\$2,674.80
Fiberglass Insulation (Batts) 23" wide R-19 - roll	120	36.01	\$4,321.20	36.23	\$4,347.60	35.76	\$4,291.20	36.76	\$4,411.20	35.95	\$4,314.00
Fiberglass Insulation (Batts) 15" wide R-25 - roll	100	23.99	\$2,399.00	24.51	\$2,451.00	24.08	\$2,408.00	25.11	\$2,511.00	24.56	\$2,456.00

		Offeror A		Offeror B		Offeror C		Offeror D		Offeror E	
	Quantity	Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost	Total Cost
Fiberglass Insulation (Batts) 23" wide R-25 - roll	100	46.56	\$4,656.00	46.77	\$4,677.00	46.28	\$4,628.00	46.99	\$4,699.00	47.15	\$4,715.00
Fiberglass Insulation (Batts) 15" wide R-30 -roll	100	27.23	\$2,723.00	26.56	\$2,656.00	26.12	\$2,612.00	26.67	\$2,667.00	26.71	\$2,671.00
Fiberglass Insulation (Batts) 23" wide R-30 - roll	40	42.24	\$1,689.60	41.89	\$1,675.60	41.36	\$1,654.40	41.66	\$1,666.40	42.02	\$1,680.80
Fiberglass Insulation (Batts) 15" wide R-38 - roll	40	17.89	\$715.60	17.45	\$698.00	17.72	\$708.80	18.05	\$722.00	17.81	\$712.40
Fiberglass Insulation (Batts) 23" wide R-38 - roll	40	31.56	\$1,262.40	31.07	\$1,242.80	31.20	\$1,248.00	31.31	\$1,252.40	31.24	\$1,249.60
Cellulose Blow-In Insulation - 27lbs bag	700	5.99	\$4,193.00	5.78	\$4,046.00	5.20	\$3,640.00	5.65	\$3,955.00	5.45	\$3,815.00
20" Insulation Guard- 50' roll	14	47.25	\$661.50	46.75	\$654.50	47.00	\$658.00	47.47	\$664.58	46.95	\$657.30
Black Visqueen (Polyethylene) - 6 mil 10 x 100	40	34.99	\$1,399.60	34.75	\$1,390.00	34.50	\$1,380.00	35.25	\$1,410.00	34.89	\$1,395.60
Clear Visqueen (Polyethylene) - 6 mil 10 x 100	40	33.00	\$1,320.00	32.31	\$1,292.40	31.96	\$1,278.40	32.98	\$1,319.20	32.03	\$1,281.20
Tubular Pipe Insulation - 1/f	2,500	0.47	\$1,175.00	0.50	\$1,250.00	0.44	\$1,100.00	0.51	\$1,275.00	0.49	\$1,225.00
Roof Cement Tar - 5-gallon bucket	20	27.75	\$555.00	27.65	\$553.00	28.00	\$560.00	28.30	\$566.00	27.75	\$555.00
Roof Patch - 11 oz tube	120	1.95	\$234.00	1.77	\$212.40	1.86	\$223.20	1.90	\$228.00	1.99	\$238.80
Gable End Vents 12" x 12" - each	30	8.75	\$262.50	8.98	\$269.40	8.80	\$264.00	8.85	\$265.50	8.79	\$263.70
Gable End Vents 14" x 24" - each	30	21.45	\$643.50	21.73	\$651.90	21.69	\$650.70	21.78	\$653.40	21.61	\$648.30
Window Casing - 1/f	200	0.49	\$98.00	0.51	\$102.00	0.42	\$84.00	0.45	\$90.00	0.48	\$96.00
1" x 2" Lumber - 1/f	1,000	0.42	\$420.00	0.43	\$430.00	0.45	\$450.00	0.46	\$460.00	0.46	\$460.00
1" x 4" Lumber - 1/f	1,000	0.96	\$960.00	0.97	\$970.00	0.98	\$980.00	1.10	\$1,100.00	1.01	\$1,010.00
1" x 6" Lumber - 1/f	600	1.37	\$822.00	1.45	\$870.00	1.39	\$834.00	1.35	\$810.00	1.42	\$852.00
2" x 4" Lumber- 1/f	500	0.39	\$195.00	0.44	\$220.00	0.37	\$185.00	0.35	\$175.00	0.42	\$210.00
1/2" Treated Plywood- 4 x 4 x 8 sheet	25	26.99	\$674.75	27.02	\$675.50	26.88	\$672.00	26.75	\$668.75	26.90	\$672.50
3/4" Plywood - 4 x 4 x 8 sheet	10	27.09	\$270.90	27.00	\$270.00	26.72	\$267.20	26.86	\$268.60	26.92	\$269.20
1/2" Plywood - 4 x 4 x 8 sheet	24	16.60	\$398.40	16.99	\$407.76	16.48	\$395.52	16.67	\$400.08	16.79	\$402.96
1/2" Gypsum Board - 4 x 4 x 8 sheet	40	8.67	\$346.80	8.56	\$342.40	8.48	\$339.20	8.51	\$340.40	8.59	\$343.60
Wood Lath - 50 pcs bundle	100	12.45	\$1,245.00	12.05	\$1,205.00	12.76	\$1,276.00	12.87	\$1,287.00	12.90	\$1,290.00

		Offeror A		Offeror B		Offeror C		Offeror D		Offeror E	
	Quantity	Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost	Total Cost	Unit Cost	Total Cost
Double Strength Glass - per sq. ft.	10	1.17	\$11.70	1.15	\$11.50	1.25	\$12.50	1.28	\$12.80	1.18	\$11.80
3/4" x #8 Hexhead Screws- 100 ct box	100	1.97	\$197.00	1.89	\$189.00	1.87	\$187.00	1.94	\$194.00	2.07	\$207.00
1 1/2" x #8 Hexhead Screws - 100 ct box	50	2.88	\$144.00	2.70	\$135.00	2.85	\$142.50	2.98	\$149.00	3.01	\$150.50
Total Cost			\$68,945.05		\$68,904.88		\$67,090.17		\$69,256.89		\$68,482.95

In the example Offeror C would be the primary contractor. If multiple contractors are used the following order of selection would be Offeror E, Offeror B, Offeror A, and last Offeror D.