

Request for Qualifications/Bid for Service Proposal CES Weatherization Services

BID Instructions

This Request for Bid for Service Proposal is solely for the use of CES Energy Efficiency Division and is comprised of the following:

- a. Cover Memorandum dated January 12, 2012;
- b. BID instructions, General Information, Minimum Certifications & Assurances;
- c. Bid Form / General
- d. Company Information Sheet
- e. Certification Regarding Debarment and Suspension
- f. Weatherization Activities/Measures
- g. Outreach Activities
- h. Specialty Services-HVAC & Water Heater Repair/Replacement
- i. Specialty Services-Attic Insulation

DELIVERY METHODS

One (1) copy, labeled "Attic Insulation, HVAC, Water Heater Repair/Replacement and Outreach Services Invitation to Bid" shall be provided and addressed to:

CES Fiscal Department
Attn: Eleanor Webster, Manager
16743 Schoenborn St.
North Hills, CA 91343

Quotations will be accepted until 4:00 pm on January 24, 2012 (Tuesday). Quotations will be accepted in person, by courier service or U.S. Mail.

NOTE: Unacceptable methods include electronic versions/e-mail, or fax/facsimile copies.

QUOTATIONS SUBMISSION: All information provided in response to this Request for Bids is subject to verification. Misleading and/or inaccurate information shall serve as grounds for disqualification at any stage in the procurement process.

FORMAT:

Use the enclosed forms. **ALL BIDS MUST CONTAIN AN ORIGINAL SIGNATURE AND DATE** from the company's Chief Executive Officer, President, Business Owner, or Sole Proprietor.

CONTACTS:

CES reserves the right to contact bidders for additional information and/or for clarification of the information contained within their bid.

PRICING AND PAYMENT SCHEDULE:

This agreement will be on a cost reimbursement or fixed price basis. Payments will be made after completion of work or delivery of services, inspection, verification and acceptance by CES. All submitted price quotes should be all inclusive covering administrative costs, labor and materials, overhead and other related costs.

Key Dates

Request for Bids Issued	January 6, 2012 (FRIDAY)
Mandatory Bidders Conference	January 19, 2012 (THURS. 2:00-4:00 PM)
Quotations due and opened	January 24, 2012 (TUESDAY)
Quotations Evaluations	January 26, 2012 (THURSDAY)
Agreements signed	January 31, 2012 (TUESDAY)

INQUIRIES:

All inquiries concerning this Request for Bids will be submitted in writing addressed to:
CES Fiscal Department
ATTN: Eleanor Webster, Fiscal Manager
16743 Schoenborn St.
North Hills, CA 91343

DISCLAIMER:

This Request is an Invitation to submit a Bid on Outreach Attic; Attic Insulation; HVAC; and Water Heater Repair/Replacement services. It is not an offer to contract or a guarantee, expressed or implied, that a contract will result from this process. An **Eligibility List** will be activated based on those bidders deemed qualified. CES is not liable for any costs associated with the preparation or submission of a response to this bid for service. Once approved, selected bidders will be eligible to receive a subcontract from CES for the approved program or component(s) for Program Years 2011-2012. Any changes that may subsequently disqualify an approved bidder will be specified in writing by CES to the affected party(ies).

During any given year, CES has sole discretion to decide whether or not to subcontract out one or more programs and/or components to one or more approved subcontractors.

Additionally, CES retains the right to change the terms and/or conditions of an executed subcontract during the term of that agreement if funding or other conditions require an action to occur.

General Information

On-Call/Activation Term:

This Request for Bids will be used to identify and approve eligible licensed contractors for program period ending December 31, 2012. During this time period, contracts may be issued to approved subcontractors for specific work to be completed based on need, performance and funding availability.

Performance Standards:

All services provided are to be completed based on specific instructions, standards of installation, policies/procedures and/or other factors mandated by each of the contract's funding sources. For installation of all specialty component work such as Attic Insulation, all the materials and installation work shall adhere to the standards set by the State of California Department of Community Services and Development.

Licensing and Certifications:

Contractors hired as Weatherization Contractors must possess and maintain in good standing all required licensing including General Contractors (B1) or Energy Conservation Specialty (D65) issued by the California State Licensing Board (CSLB) or provide evidence of an Exemption Waiver if a governmental entity. Contractors hired for Specialty Contract Work must hold a (C20) and (C36) specialty license for HVAC work or a (C2) for Attic Insulation work.

Prevailing Wages:

Federal prevailing wage requirements shall apply to the subcontractors. Where applicable, all laborers and technicians used by the subcontractor(s) to perform work on the contract shall be subject to the Davis – Bacon Prevailing Wage Requirements for their specific trade(s).

Liaison:

A liaison, **Eleanor Webster**, Fiscal Manager, will serve as the contact point for vendors/contractors. She will coordinate the services and serve as the communication link between CES and vendor/contractors. She can be reached at **(818) 894-8121**. **Please email all questions at: cesmnca2@yahoo.com**

Mandatory Bidders Conference:

Will be held at CES – 16743 Schoenborn St., North Hills, CA 91343 on Thursday, January 19, 2012, from 2:00 PM – 4:00 PM.

List of Required Documents:

- 1) Copy of a current and valid business license(s)
- 2) Copy of a current and valid CA Contractors License(s)
- 3) Copy of Certificate of Training Completion issued by a training center approved by CSD
- 4) Copy of a current Certificate of Insurance for General Liability, Automobile Liability, Pollution Occurrence and Workers Compensation.

Minimum Requirements, Certification & Assurances:

In order to be approved as a Subcontractor, the following requirements, certifications and/or assurances must be met:

1. Subcontractors must have completed all training and certification required by the California Department of Community Services and Development (CSD) and must be able to present Certificate of Completion issued by a training center approved by CSD.
2. Appropriate licensing by the State is held by the Subcontractor's owner and/or their key staff assigned to directly work on CES contracts; Valid business license, State Contractors license and specialty license must be furnished.
3. The Subcontractor maintains sufficient number of qualified staff to complete the activity, service and/or production level within the stated/required time period;
4. Bidders shall furnish CES with satisfactory evidence of their technical ability to perform Outreach, Attic Insulation, HVAC or Water Heater Repair/Replacement services. Each Bidder shall provide a list of successful experience with similar scope and technical skill set or other relevant experience that qualified the Bidder to implement the services identified for bid;
5. Subcontractor is an independent entity, totally separate and apart from CES and holds CES and its Funding Sources harmless for any action or omissions for work completed;
6. Financial capability to carry out the implementation of Outreach, Attic Insulation, HVAC or Water Heater Repair/Replacement services.
7. Insurance requirements and minimum limits will be met and maintained. Proof of insurance must be furnished. Required document may include: General Liability, Automobile Liability, Pollution Occurrence Insurance and Workers Compensation. CES is to be named as "additional insured".
8. Only authorized individuals/signatories (such as the Company Owner or Sole Proprietor) will be contacted to negotiate the subcontract. The signatory on this Bid must match the signatory on any subcontract that is negotiated and executed. Should a change in ownership within a company occur and the original owner leaves, the bid and subsequent subcontract is null and void. No subcontract can be transferred to another entity.
9. Subcontractor must demonstrate that it meets all federal, state and local laws
10. regarding equal opportunity employment, nondiscrimination, drug and other certifications as deemed appropriate by this subcontract. Subcontractor assures that there are no outstanding legal actions past, pending or soon to be underway with regard to their company, licensing, tax filing, financial status or other related matter which could jeopardize the programs or entities that fund the negotiated subcontract.
11. Additional assurances as required by our funding sources and/or which apply to the subcontract negotiated. All required assurances must be met and agreed to as part of subcontract negotiation process before a subcontract will be approved and executed by CES' Officers and Board.

EVALUATION CRITERIA:

CES will evaluate bid proposals based on completeness and comprehensive of Bidder's response and provision of information about: Contractor's Credentials—both operational and financial (15%), Skill and Experience (20%), Familiarity with Energy Conservation program installations and State CSD guidelines (25%), and Response (Fee Schedule and/or Price Quotes) to the services identified for bid (40%).

Below are some indicators of these factors.

1. Completeness of proposal/bid documents, conformity to specifications and scope of work, including copies of all the required documents (Please see page 4 for List of Required Documents)
2. Organizational (adequate staffing with qualified personnel, necessary equipment) and financial (capital and/or financing) capability to carry out the implementation of Attic Insulation and/or Outreach Services;
3. Previous and current experience of principal members of the Bidder's organization in providing Attic Insulation and/or Outreach services or successful projects of similar breadth, scope and technical skill set;
4. Familiarity and experience with State CSD weatherization programs;
5. Appropriate bond, insurance, certificates and necessary permits/licenses to perform Attic Insulation, HVAC or Water Heater Repair/Replacement services under bid and which shall be in force and remain in force for the duration of the contract period;
6. References from existing and past customers;
7. Fee schedule and/or price quotes for Outreach, Attic Insulation, HVAC, or Water Heater Repair/Replacement services shall include administration, labor & materials, applicable permits, overhead and other related costs. Labor wage will be required to adhere to Davis/Bacon regulations and/or prevailing wage laws.
8. Overall relevant experience and credentials.

ATTACHMENT 1

BID / GENERAL SUBMITTAL FORM– ALL APPLICANTS

FAILURE TO SIGN AND RETURN THIS BID/SUBMITTAL FORM WITH YOUR BID MAY BE CAUSE FOR REJECTION.

The undersigned certifies that the Bidder has examined and is familiar with the Bid Request, CES Weatherization Services, including the specifications, conditions and warranties required; that the Bidder has checked all the figures shown in the bids submitted for Outreach Services, Attic Insulation, HVAC and Water Repair/Replacement and other attachments hereto and understands that CES will not be responsible for any errors or omissions on the Bidder's part in making up this bid.

Attached and made a part of this Bid Form are documents specified in Bidder's Format, provided in the Invitation to Bid.

It is understood that the Bidder will abide as specified in Minimum Requirements, Certification & Assurances of this Bid.

The undersigned also warrants that it is the authorized representative of Bidder and has the capacity to sign for and bind the Bidder to the proposed responsibilities of this Bid.

Company Name

Printed Name of Bidder's Authorized Officer/Representative

Signature of Authorized Officer/Representative

Date

Business Address

Telephone Number

Cellular Number

Fax Number

Email Address

Note:

If Bidder is a corporation or partnership, indicate the legal name of the corporation or partnership and attach certification authorizing signatory to sign contracts on behalf of the corporation/partnership. Failure to attach certification of authority may result in rejection of bid proposal.

**ATTACHMENT 2
COMPANY INFORMATION – ALL APPLICANTS**

COMPANY NAME		
Address:		
City:	Zip:	
Phone (office):	Phone (cell:)	
Fax:	e-mail:	
Alternate Contact:	Phone:	
Website:		
CONTACT INFORMATION		
Name / Position:		
Phone:	Fax:	
e-mail:		
BUSINESS INFORMATION		
OWNERSHIP STRUCTURE: Self Proprietor <input type="checkbox"/> Limited Partnership <input type="checkbox"/> C or S Corporation <input type="checkbox"/> Private, Non-Profit(501-3) <input type="checkbox"/> Public <input type="checkbox"/> Other <input type="checkbox"/>		
Date Business Formed:		
Parent Company (if any):		
Affiliates (if any):		
Subsidiaries (if any):		
STATE CONTRACTORS LICENSE HELD		
License #1		
License #2		
License #3		
MANAGEMENT INFORMATION		
LIST OF COMPANY'S MANAGING AND CONTROLLING PERSONNEL		
Personnel:	% Ownership	Years in Company
<ul style="list-style-type: none"> Please enclose resume of key personnel to include professional experience and areas of responsibilities. 		

ATTACHMENT 3

ALL APPLICANTS

Contractor Information Regarding Debarment and Suspension

CONTRACTOR'S NAME: _____

Certification Regarding Debarment, Suspension, and Other Responsibility Matters

Primary Covered Transactions

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

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) 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 to 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:** _____

**ATTACHMENT 4
WEATHERIZATION ACTIVITIES/MEASURES**

Contractors may bid on one or all of these Weatherization activities/measures. Please complete the applicable attachments (Outreach Services and/or Specialty Services-Attic Insulation; HVAC; Water Heater/Replacement) as it pertains to the bids you wish to submit for.

Specialty Services (Attic Insulation, HVAC, Water Heater/Replacement) will only be approved for contractors that hold the appropriate licensing and/or certification required for that discipline.

BIDDERS NAME	
COMPANY NAME	
Address	
City:	Zip:
Phone (office):	(cell):
Fax:	e-mail:
Alternate Contact:	Phone:
Website:	
STATE CONTRACTORS LICENSE HELD	
License #1	
License #2	
License #3	
TYPE OF AGENCY/BUSINESS Self Proprietor <input type="checkbox"/> Limited Partnership <input type="checkbox"/> C or S Corporation <input type="checkbox"/> Private, Non-Profit(501-3) <input type="checkbox"/> Public <input type="checkbox"/> Other <input type="checkbox"/>	
AGENCY BUSINESS DESCRIPTION	
CHECK THE CES SUBCONTRACTS YOU WISH TO APPLY FOR. BIDS OPENED ARE AVAILABLE AS FOLLOWS:	
<input type="checkbox"/> Outreach Services Specialty Services Only: <input type="checkbox"/> Attic Insulation <input type="checkbox"/> HVAC <input type="checkbox"/> Water Repair/Replacement	
I certify under penalty of perjury that the information on this application is true and correct. I also declare that I have the authority to submit this BID, which is valid for _____ days / _____ month (s) / _____ year (s). (Choose time period & enter term). _____ Signature Date _____ Print Name and Title	

**ATTACHMENT 5 : INVITATION TO BID
OUTREACH SERVICES**

OUTREACH

The act of disseminating general program information into the community at large or, to conduct a targeted outreach to reach specific populations communities because of language barriers or their at-risk/vulnerable status. For example, targeting disabled or senior citizens by making presentations and disseminating information in places where elderly individuals live (over 60 years of age) or congregate. Examples include: an older adult mobile home park, HUD Housing Complex, a congregate feeding site; a community center or senior recreation center, etc. Outreach ensures that eligible households needing a variety of assistance are made aware of services which are free and/or offered at no cost to them.

Subcontractors wishing to BID on this component must complete this section showing the fee per client.

Note: **For Subcontractors choosing only Specialty Services, this section is NOT APPLICABLE.**

The following activity shall include administrative, labor, overhead and other related costs:

ACTIVITY / MEASURES	COMMENTS	PROPOSED RATE PER CLIENT
1.OUTREACH		

**ATTACHMENT 6
SPECIALTY SERVICES – HVAC & WATER HEATER REPAIR/REPLACEMENT**

Items below are bids for HVAC Services only, to include repair/replacement of gas appliances. Please provide your fees by measure to include administration, labor, material cost, applicable permits and other related cost per unit. (Please submit a spreadsheet showing all cost by measure)

	Comments	Proposed Rate
SPACE HEATING SOURCE REPLACEMENT		
Exterior Wall Direct Vent Furnace	BTU's	
Forced Air Unit, Split System	BTU's	
Floor Furnace	BTU's	
Interior Wall Furnace (single wall gravity)	BTU's	
Interior Wall Furnace (Dual wall gravity)	BTU's	
Mobile Home Furnace	BTU's	
Package Unit (Dual Pack)		
Wood Fueled Appliance		
Other items not listed		
SPACE HEATING SOURCE REPAIRS (not to exceed 30% of replacement cost)		
Exterior Wall Direct Vent Furnace		
Forced Air Unit, Split System		
Floor Furnace		
Interior Wall Furnace (Single Wall Gravity)		
Interior Wall Furnace (Dual Wall Gravity)		
Mobile Home Furnace		
Package Unit (Dual Pack)		
Wood Fueled Appliance		
Other Items not listed		
WATER HEATING		
Gas Water Heater Repair (limit to 50% of replacement cost)		
Gas Water Heater Replacement (Open or Closed Combustion)		
AIRCONDITIONING		
Forced Air Unit, Split System Repair or Maintenance		
A/C Unit Window/Wall Unit (includes filter replacement, cleaning, & heat exchanger)		
A/C Replacement, per dwelling(Central Unit)		
A/C Multi-Story 110V Wall Unit Replacement		
A/C Multi-Story 110V Window Unit Replacement		
A/C Single-Story 110V Wall Unit Replacement		
A/C Single-Story 110V Window Unit Replacement		
A/C Single-Story 220V Wall Unit Replacement		
A/C Single-Story 220V Window Unit Replacement		
Cooling Source repair, other types not listed		
Cooling Source replacement, other types not listed		

**ATTACHMENT 7
SPECIALTY SERVICES – ATTIC INSULATION**

Items below are bids for Attic Insulation Measures only (Specialty Services). Please provide your cost to include administrative, labor & materials, applicable permits, overhead and other related costs per unit. (Please submit a spreadsheet showing all costs by measure)

ATTIC INSULATION MEASURES	Comments	Price
Attic Ventilation		
A)1 Vent (upper or lower) or Vents(upper & lower)		
B)2 Vent (upper & lower)		
Eave Vent		
Former Vent		
Turbine		
Vent Screen		
Ceiling Insulation or Kneewall Insulation (loose fill) R-30		
Duct Insulation		