

PROCUREMENT TOOLKIT

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ATTACHMENTS

The following attachments are available for your use in either a Word file or Excel file.

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- B. Request for Quotations General Instructions
- C. Contractor Information and Debarment and Suspension
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- Z. Sample Newspaper Advertisement
- AA. Sample Procurement Procedures

A. INTRODUCTION

The goal of procurement is “to get the best possible product and/or service at the best possible price.” The traditional role of procurement management is to ensure that there is a supply of goods and services to support the organization’s operations and save money in the process. The common tactic to accomplish this is through competitive bidding to ensure that suppliers provide their best price.

Cost reduction is only part of the procurement goal for organizations; the best use of procurement is to maximize the value of goods and services for the organization. In order to do this the organization must define how procurement activities will be organized, conducted, and managed.

There are also specific federal regulations which establish procurement standards that must be followed and each state will have their own set of requirements. All of this must be incorporated into how the organization purchases goods and/or services for the Weatherization Assistance Program.

It is important that prior to issuing the Request for Quotation the agency review its internal procurement policy and procedure to insure compliance with all agency requirements. A sample procurement procedure is located in Attachment AA. Also review State procurement requirements.

The purpose of the Weatherization Assistance Program Procurement Tool Kit is to provide examples for illustrative purposes of documents that can be used in purchasing materials and/or services. The tool kit is organized as follows:

- There are basically twelve activities required in all large purchases. Each of the twelve activities is described. Also a check list is provided to assist you when conducting your procurement activities.
- An example of General Instructions for companies and individuals that are interested in providing a quotation, proposal or bid. It is important to incorporate all individual State requirements into the General Instructions that are to be used by your organization.
- An example of Contractor Information that could be used to secure standard information from all potential contractors. The form could be included as part of the requirements of a solicitation or develop a bidders list.
- Examples of Price Quotation Sheets for building shell measures, mechanical measures, electric base-load measures, health and safety measures, and other individual examples.

- Examples of Evaluations of each of the Price Quotation Sheets identified above. The purpose of the evaluation sheets is to provide examples of how different offerors are evaluated and documentation of the evaluation.
- Each of the examples presented is included on the CD as either a word or excel file so that if you would like to modify them and use them they are easily accessible.

The tool kit has been designed to assist organizations in meeting the goals of the Recovery Act and the Department of Energy Weatherization Program.

B. THE TWELVE STEP PROGRAM TO PROCUREMENTS

STEP ONE

Determine what you will be purchasing. The agency will determine what it is that they will require cost quotations for. If the agency uses crews to perform the weatherization work it might only need to secure cost quotations for equipment to be used by the crews and materials. The agency would then determine if they will be warehousing materials or purchasing on a house by house basis from a designated vendor.

STEP TWO

Establish timeframe for the purchase(s). The agency will then determine their purchase cycle which will include what they will be purchasing and when they will need the services and/or materials and in what quantities. It is important that the potential providers of the services and/or materials are aware of the timeframes.

STEP THREE

Identify the lead individual within the organization that will handle the purchase(s). It is important that a single individual coordinate the solicitation activities and serve as the agency contact for all potential suppliers.

STEP FOUR

Prepare general instructions. The general instructions can be used for all cost quotations and should include general information that will be applicable to all suppliers and/or contractors. The general instructions are a critical component of the solicitation activities as it provides the agency requirements and rules for providing weatherization services and/or materials to potential suppliers. It is important to work with your state office to insure that all state requirements are included in the instructions. An example of general instructions is located on page 7. Attachment B is the sample of the general instructions in a word format that can be modified as appropriate and used by your agency.

STEP FIVE

Prepare specifications and price quote sheets. The specification and price quote sheets detail specifically what it is that the agency will be purchasing and provides the offeror with the format that quotations are to be submitted on. The preparation of the specifications is the most important component of any solicitation to insure that the agency receives the services and/or materials that they want, in the timeframe that they want it, at the best possible price. Pages 24 through 57 provide examples of

specification and price quote sheets for building shell, mechanical, electric base-load, and health and safety measures. There are also examples of materials and whole house weatherization specifications and price quote sheets. Attachments D through N are the examples in a word format that can be modified as appropriate and used by your agency.

STEP SIX

Advertise the solicitation. All purchases above your agency's small purchase threshold must be advertised unless non competitive procurement has been approved by your state. There are many ways advertising can be done from advertisement in the newspaper to posting at public buildings. The objective is to inform as many potential vendors and contractors of the solicitation. A sample newspaper advertisement is located in Attachment Z.

STEP SEVEN

Conduct bidders' conference. The purpose of the bidders' conference is to provide information to all potential providers of the services and/or materials that they will need to know about the solicitation and the level of expectation for services and materials. It is also a good time to respond to questions about the solicitation. It is recommended that the bidders conference be mandatory unless potential suppliers and contractors would have to travel long distances to attend. If this is the case the agency may want to conduct a conference call for all potential suppliers and contractors. The other alternative is to request that all potential suppliers and contractors submit questions by a specific date. The agency would develop responses to the questions and send the information to all individuals that had requested the Request for Quotations.

STEP EIGHT

Receive quotations. An individual within your organization should be designated to receive the quotes up until the closing date and time. The individual would maintain the unopened quotes in a locked area of the agency until the closing date and time. The individual designated should not be the same individual as the lead individuals handling the solicitations for the agency.

STEP NINE

Evaluate quotations. The agency will then evaluate the quotations submitted and select the successful vendor(s) and/or contractor(s). If the evaluation is based on cost alone the agency will only need to determine if the vendor and/or contractor meet the minimum requirements and those that provided the lowest cost. If factors other than cost are included the agency will have to apply points to each of the

criteria and assess each criterion for each quote. Examples of completed evaluation worksheets are located on Pages 60 through 72. Attachments O through Y are the examples in an excel format that can be modified as appropriate and used by your agency to evaluate quotations.

STEP TEN

Select contractor(s)/vendor(s). Based on the evaluation of quotes a single or multiple vendors and contractors will be selected and notified of the selection in writing.

STEP ELEVEN

Establish solicitation file. It is important to maintain a solicitation file separate from the vendor or contractor file. The solicitation file would include the Request for Quotation document(s) including general instructions and specification and price quotes, copy of the advertisement, the attendees and minutes of the bidders' conference, the quotes received, the evaluation papers, and notice to the successful vendor(s) and/or contractor(s).

STEP TWELVE

Enter into Agreements with contractor(s)/vendor(s), as appropriate. After the agency has made their selection the agency would enter into the agreement with the supplier(s)/contractor(s). It is important to work with your state office to insure that all state requirements are included in the agreement.

A CHECKLIST FOR EACH OF THE TWELVE STEPS IS LOCATED ON THE NEXT PAGE. A Word version of the checklist is located in Attachment A.

THE TWELVE STEP PROGRAM TO PROCUREMENTS CHECKLIST

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

C. REQUEST FOR QUOTATION GENERAL INSTRUCTIONS

(INSERT AGENCY NAME)

REQUEST FOR QUOTATION

WEATHERIZATION MATERIALS AND SERVICES

(INSERT AGENCY ADDRESS)

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VI. Davis Bacon

I. INTRODUCTION

I.1. PURPOSE OF THIS REQUEST FOR QUOTATION

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

I.2. BACKGROUND

I.2.1. Overview of (INSERT AGENCY NAME) Weatherization 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 (Weatherization) 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) To insure that all materials and/or services meet the Agency's and the Department of Energy standards and requirements.
- 3) To insure 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's 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 purchased. 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 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 in writing and addressed to:

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

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

In no case shall 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* 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

One copy labeled "Weatherization RFQ" shall be provided and addressed to:

(INSERT INDIVIDUALS NAME)
(INSERT AGENCY NAME)
(INSERT AGENCY ADDRESS)

Quotations shall be accepted until (INSERT DATE AND TIME). Quotations shall be accepted in person, by courier service, or the US Mail. Faxed or emailed quotations shall not be considered.

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 package consisting of the signed quotations containing all required information, shall be SEALED, clearly labeled with the following information and delivered on or before the quotations due date/time to:

Contact Name: (INSERT NAME IDENTIFIED ABOVE)
Address: (INSERT 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 publicly at the time and place designated on the cover page of 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 (INSERT No.) years experience.

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 quotations 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 all holders on record of RFQ documents. 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:

1. 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:

- A. 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.
2. 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 persons 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 quotes are attached.

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 in order for the quotations to be evaluated. Quotations that are incomplete or contain significant inconsistencies or inaccuracies may be rejected by (INSERT AGENCY NAME) without further discussion.

VI. FEDERAL WAGE RATE REQUIREMENTS

The Davis-Bacon Act wage rules apply to all agreements under the solicitation.

(INSERT AGENCY NAME)
(INSERT AGENCY ADDRESS)

Phone: (Insert Phone Number) Fax: (Insert Fax Number)

Contractors Information/Application 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/women 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 with a minority/women's business enterprise program or LSA?
Yes No

If your answer is "YES," please submit a copy of certification.

Please check the type(s) of construction you have performed in the last year:

☐ Home Remodeling ☐ Home Building ☐ Major Construction –Specify: _____

Please list all education and training that you have 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 supplies 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*

List the names and addresses of the last three clients for whom you have completed construction:

<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 done? _____

What is the largest/value job you have done? _____

How many employees do you employ full-time? _____

Have you ever worked for the Department of Housing and Urban Development (HUD)?

Circle One: Yes No

If Yes: when and where?

What type of job?

Please complete the following ethnic information, gathered by HUD for statistical purposes only:

Please check one:

_____ White
_____ Black
_____ American Indian/ Alaskan Native
_____ Hispanic
_____ Asian/ Pacific Islander

**THE UNDERSIGNED CONTRACTOR CERTIFIES 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 property requirement standards.
- 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, please request that a Certificate of Insurance and Worker's Compensation Certificate be sent to *Insert Agency*

Contractor's Signature:

_____ Date _____

D. 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, Participants' responsibilities. The regulations were published as Part VII of the May 26, 1988 Federal Register (pages 19160-19211).

(Before Signing Certification, Read Attached Instruction)

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 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

E.a. INSULATION SPECIFICATIONS AND PRICING QUOTE

**All materials used in provision of services must meet or exceed 10 CFR 440
Appendix A: "Standards for Weatherization Services"**

Estimate to insulate in accordance with federal energy efficiency standards and installation methods. Insulation will be evenly installed with no voids, gaps, misalignments, or compression issues. Precautions must be taken when insulating around or on electrical boxes and/or heat producing fixtures. Proper shielding, if necessary, shall be installed by insulation contractor in order to properly insulate all areas. For attic insulation, all wall cavities and drop downs that are exposed to attic shall be capped and insulated over or filled with insulation to assure insulation is in direct contact with air barrier. In these cases a change order would have to be approved. Insulation amount shall also be identified at nearest or easiest attic access point. After completion, all jobs will be inspected by (Insert Agency Name) auditor to assure quality installation. Complete installation must include all labor, and materials to perform services. Contractor MUST provide details on each invoice listing actual square foot installed.

Contractor is responsible for leaving the job site clean and hauling away job debris.

Project commencement and completion must be accomplished within _____ working days of notice to proceed.

Contractor must include permit fees (if applicable), sales taxes, labor and materials to complete project.

ATTICS: CELLULOSE (Brand:_____)	
Scope of Work	Sq. Ft. Estimate
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$

Initials

ATTICS: FIBERGLASS BLOWN (Brand:_____)	
Scope of Work	Sq. Ft. Estimate
Bring R-_____to R-_____	\$
Bring R-_____to R-_____	\$
Bring R-_____to R-_____	\$
Bring R-_____to R-_____	\$

ATTICS: BATT (Brand:_____)	
Scope of Work	Sq. Ft. Estimate
Bring R-_____to R-_____	\$
Bring R-_____to R-_____	\$
Bring R-_____to R-_____	\$
Bring R-_____to R-_____	\$

WALLS: CELLULOSE (Brand:_____)	
Scope of Work	Sq. Ft. Estimate
Bring R-_____to R-_____	\$
Bring R-_____to R-_____	\$
Bring R-_____to R-_____	\$
Bring R-_____to R-_____	\$

WALLS: FIBERGLASS BLOWN (Brand:_____)	
Scope of Work	Sq. Ft. Estimate
Bring R-_____to R-_____	\$
Bring R-_____to R-_____	\$
Bring R-_____to R-_____	\$
Bring R-_____to R-_____	\$

Initials

WALLS: BATT (Brand:_____)	
Scope of Work	Sq. Ft. Estimate
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$

FLOORS: CELLULOSE (Brand:_____)	
Scope of Work	Sq. Ft. Estimate
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$

FLOORS: FIBERGLASS BLOWN (Brand:_____)	
Scope of Work	Sq. Ft. Estimate
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$

FLOORS: BATT (Brand:_____)	
Scope of Work	Sq. Ft. Estimate
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$
Bring R-_____ to R-_____	\$

Signature

Date

E.b. PRESSURE DIAGNOSTIC GUIDED DUCT SEALING/AIR SEALING OF THE BUILDING SHELL SPECIFICATION AND PRICING QUOTE

All materials used in provision of services must meet or exceed 10 CFR 440 Appendix A: "Standards for Weatherization Services"

Contractor is responsible for providing air sealing/duct sealing measures in accordance with BPI or other state directed minimum standards designed to ensure the health and safety of the occupants while improving energy efficiency.

Duct leakage must be documented before and after duct sealing occurs. This must be done using approved pressure diagnostics measurement equipment such as a Blower Door or equal to prioritize work to ensure largest leaks and highest pressures are sealed first. Following BPI or State of _____ approved Standards for Minimum Health and Safety Requirements at all times. If the measured whole house CFM50 is below minimum airflow standards set by BPI or State of _____ approved standards then mechanical ventilation must be installed. If combustion appliances are present, contractor must perform a Combustion Safety test and CAZ tests both before and after work completed and report results to ensure that minimum safety requirements are met as outlined in BPI Building Analyst Technical Standards/ Combustion Safety Test Action Levels and CAZ Depressurization or State of _____ Limits. These tests are **required** and must be included as part of all duct sealing/air sealing measures. Contractor should include cost to perform these tests as part of the standard measures below.

Contractor is responsible for leaving the job site clean, hauling away existing equipment (if applicable) and for properly disposing of existing equipment to meet EPA regulations.

Project commencement and completion must be accomplished within _____ working days of notice to proceed.

MEASURES	
Duct Sealing/Air Sealing	Per Unit Cost
Properly seal all duct connections including drywall to boot connections and plenum to air handler both supply and return side. All work must be done using approved pressure diagnostics measurement equipment such as a Blower Door or equal.	\$
Install Air Barrier (per square foot installed) (using duct board or WAP approved equal)	\$
90 cmf Fan	\$

Signature

Date

E.c. WINDOWS AND DOORS SPECIFICATIONS AND PRICING QUOTE

**All materials used in provision of services must meet or exceed 10 CFR 440
Appendix A: "Standards for Weatherization Services"**

Estimate to remove and replace windows and doors in accordance with federal energy efficiency standards and installation methods including LSW (if applicable).

Contractor is responsible for leaving the job site clean, hauling away job debris, and existing equipment (if applicable) and for properly disposing of existing materials to meet LSW regulations.

Project commencement and completion must be accomplished within _____ working days of notice to proceed.

REPLACEMENT: Contractor must include permit fees (if applicable), sales taxes, labor and materials to complete project.

WINDOW REPLACEMENT: (Brand _____)	
Scope of Work	Sq. Ft. Cost
Insulated dual pane, Low-E, White, Vinyl Window	\$
Pre-hung, weatherstripped, insulated metal door	\$
Pre-hung, weatherstripped, solid core wood door	\$

=====

REPAIRS: Provide labor rate per hour for window and door repairs.

WINDOW AND DOOR REPAIRS	
Labor Rate Per Hour- Door	\$
Labor Rate Per Hour- Windows	\$

Materials will be reimbursed at actual cost with an allowance for handling of materials at a percentage of actual cost. Contractor will be required to submit the actual material receipt with all reimbursement requests.

Handling Cost _____% of actual materials cost.
--

Signature

Date

**E.d. FABRICATION AND INSTALLATION OF SOLAR SUN SCREENS
SPECIFICATIONS AND PRICING QUOTE**

**All materials used in provision of services must meet or exceed 10 CFR 440
Appendix A: "Standards for Weatherization Services"**

Estimate to measure, fabricate and install solar sunscreens in accordance with federal energy efficiency standards. Complete installation must include all labor and materials to perform services.

Contractor is responsible for leaving the job site clean and hauling away job debris.

Project commencement and completion must be accomplished within _____ working days of notice to proceed.

Contractor must include permit fees (if applicable), sales taxes, labor and materials to complete project.

SQ. FT. ESTIMATE	ADDITIONAL CHARGES
\$	\$ (please explain the charge i.e. measurement trip charge)
<i>Explanation for Additional Charge:</i>	

Attach information regarding the type of materials used to perform services

Signature

Date

E.e. REFLECTIVE ROOF COATING SPECIFICATIONS AND PRICING QUOTE

**All materials used in provision of services must meet or exceed 10 CFR 440
Appendix A: "Standards for Weatherization Services"**

Measure, provide and install DOE approved elastomeric reflective roof coating brushed or rolled on. If awarded, Contractor must agree to complete individual work order requests within 7 days of receipt of work order.

Estimate to measure, fabricate and install solar sunscreens in accordance with federal energy efficiency standards. Complete installation must include all labor and materials to perform services.

Contractor is responsible for leaving the job site clean, hauling away existing equipment (if applicable) and for properly disposing of existing equipment to meet EPA regulations.

Project commencement and completion must be accomplished within _____ working days of notice to proceed.

Contractor must include permit fees (if applicable), sales taxes, labor and materials to complete project.

Sq. Ft. Estimate:	\$
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Attach information regarding the type of materials used to perform services

Signature

Date

F.a. HVAC SPECIFICATIONS AND PRICING QUOTE

**All materials used in provision of services must meet or exceed 10 CFR 440
Appendix A: "Standards for Weatherization Services"**

All new HVAC installations are to be performed in accordance with the most recent Universal Mechanical Code and/or local building code.

Permits will be required as applicable by local building code. It will be the responsibility of the Contractor to ensure that necessary permits have been secured prior to starting work. This cost must be included in each line item price below.

The Contractor shall be responsible for ensuring properly sized gas line is supplying the heater and shall inform agency in the event that existing line is improperly sized. The Contractor shall leave all literature on the new units with the client and shall also inform the client of proper care and maintenance required on the new units.

If required by system, all venting and combustion air shall be installed in accordance with AGA and GAMA specification. New gas forced air furnaces shall have pilotless ignition.

All new unit installations shall include new thermostat.

All duct work connections and holes shall be sealed, on all sides, with a non-toxic, Department of Energy industry approved, mastic duct sealant applied per manufacturers specifications.

New conduit or gas pipe installed through the roof shall include new properly sized roof jack with 3-course seal at the roof.

All installation estimates shall include removal and proper disposal of existing equipment, recovery of refrigerant from existing system as required by law.

Contractor is responsible for leaving the job site clean, hauling away job debris, and existing equipment (if applicable) and for properly disposing of existing equipment to meet EPA regulations.

Project commencement and completion must be accomplished within _____ working days of notice to proceed.

Please list the Manufacturer brand name and model you will be using for the scope of work listed below.

Heat Pump Unit	Brand:
Gas Package Unit	Brand:
Evaporative Cooler	Brand:
Furnace	Brand:

All Contractor bid amounts below for installs of package units to include new elbow or roof curb, t-stat and stand, disconnect and fuses and condensate drain. All installs of split systems to include new line set, t-stat, condenser pad, disconnect, fuses and gas line if applicable. All tie-ins to ductwork to be sealed with a U.L approved duct mastic. Contractor is to ensure that all units are properly charged to the manufacturer's specification. Contractor is responsible for properly sizing unit using a Manual J or other heat load calculation.

REPLACEMENT: Contractor must include permit fees, sales taxes, labor and materials to complete project.

ITEM 1	
Description Of Scope Of Work	Unit Price
Removal of forced air furnace in closet and evaporative cooler on roof and replace with new 13-SEER Gas Pac unit on roof unit price should include sealing existing furnace, capping gas or electric and running new gas and electrical lines to roof for the following sizes:	CONTRACTOR'S BID AMOUNT \$

ITEM 2	
Description Of Scope Of Work	Unit Price
Replace existing split system heat pump with new 13-SEER split heat pump	CONTRACTOR'S BID AMOUNT \$

Initials

NEW DUCT SYSTEM

ITEM 3: New Return		
Description and Scope of Work		Unit Price
a.	Rigid	\$
b.	Flex	\$

ITEM 4: New Supply Drop (provide a per drop price here)		
Description and Scope of Work		Unit Price
a.	Rigid	\$
b.	Flex	\$

ITEM 5: Jumper Duct System (per room price)	\$
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ITEM 6: Install insulation on Ducts and Heating Pipes (per lineal foot to an R-__	\$
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REPAIRS: Provide labor rate per hour for HVAC repairs.

HVAC REPAIRS	
Labor Rate Per Hour	\$

Materials will be reimbursed at actual cost with an allowance for handling of materials at a percentage of actual cost. Contractor will be required to submit the actual receipt with all reimbursement requests.

Handling Cost _____% of actual materials cost.
--

Signature

Date

**G.a. ELECTRIC BASE LOAD MEASURES
SPECIFICATIONS AND PRICING QUOTE**

**All materials used in provision of services must meet or exceed 10 CFR 440
Appendix A: "Standards for Weatherization Services"**

Contractor is responsible for leaving the job site clean, hauling away job debris, and existing equipment (if applicable) and for properly disposing of existing equipment to meet EPA regulations.

Project commencement and completion must be accomplished within _____ working days of notice to proceed.

Please list the Manufacturer brand name and model you will be using for the scope of work listed below.

ITEM 1: REFRIGERATORS 18 cubic foot Freezer (Brand:_____)	
Description of Scope of Work	Unit Price
18 cubic foot refrigerator freezer. Must meet Energy Star Standards or a pre approved equal that can be proven to meet or exceed the Energy Star standards.	CONTRACTOR's BID AMOUNT \$

ITEM 2: COMPACT FLOURESCENT LIGHTING	
Description of Scope of Work	Unit Price
Replace one incandescent light bulb with compact fluorescent lighting with 18 watt cfl. Must meet Energy Star standards.	CONTRACTOR's BID AMOUNT \$

Signature

Date

**H.a. SMOKE AND CARBON MONOXIDE ALARMS
SPECIFICATIONS AND PRICING QUOTE**

**All materials used in provision of services must meet or exceed 10 CFR 440
Appendix A: "Standards for Weatherization Services"**

Contractor is responsible for leaving the job site clean and hauling away job debris.

Project commencement and completion must be accomplished within _____
working days of notice to proceed.

REPLACEMENT: Contractor must include permit fees (if applicable), sales taxes, labor and materials to complete project.

ITEM 1: SMOKE DETECTOR (Brand:_____)	
Description of Scope of Work	Unit Price
Smoke detector with 9 volt battery	CONTRACTOR's BID AMOUNT \$

ITEM 2: CARBON MONOXIDE (CO) (Brand:_____)	
Description of Scope of Work	Unit Price
Electric plug in with battery backup CO detector	CONTRACTOR's BID AMOUNT \$

=====

REPAIRS: Provide labor rate per hour for general repairs.

GENERAL REPAIRS	
Labor Rate Per Hour	\$

Materials will be reimbursed at actual cost with an allowance for handling of materials at a percentage of actual cost. Contractor will be required to submit the copy of the actual receipt with all reimbursement requests.

Handling Cost _____% of actual materials cost.

Signature

Date

H.b. WATER HEATERS SPECIFICATIONS AND PRICING QUOTE

**All materials used in provision of services must meet or exceed 10 CFR 440
Appendix A: "Standards for Weatherization Services"**

All new water heater installations are to be performed in accordance with the most recent local building codes.

Permits will be required as applicable by local building code. It will be the responsibility of the Contractor to ensure that necessary permits have been secured prior to starting work. This cost must be included in each line item price below.

The Contractor shall be responsible for ensuring properly sized gas lines, combustion air, venting, pressure release valves, and proper electrical requirements. The Contractor shall leave all literature on the new units with the client and shall also inform the client of proper care and maintenance required on the new units.

Contractor is responsible for leaving the job site clean, hauling away debris, and existing equipment (if applicable) and for properly disposing of existing equipment to meet EPA regulations.

Project commencement and completion must be accomplished within _____ working days of notice to proceed.

Please list the Manufacturer brand name and model you will be using for the scope of work listed below.

Water Heater Unit Brand:

Contractor is responsible for hauling away existing equipment and for properly disposing of existing equipment. Contractor must include permit fees, sales taxes, labor and materials to complete project.

REPLACEMENT: Contractor must include permit fees (if applicable), sales taxes, labor and materials to complete project.

ITEM 1: GAS WATER HEATER

Description of Scope of Work		Unit Price
1.1	40 Gallon	CONTRACTOR's BID AMOUNT \$

ITEM 2: ELECTRIC WATER HEATERS

Description of Scope of Work		Unit Price
2.1	30 Gallon	CONTRACTOR's BID AMOUNT \$
2.2	40 Gallon	\$
2.3	50 Gallon	\$

ITEM 3: MANUFACTURED HOME HOT WATER HEATER

Description of Scope of Work		Unit Price
3.1	40 Gallon	CONTRACTOR's BID AMOUNT \$

Hot Water Heater Wrap (R-_____)	\$_____per hot water heater
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=====

REPAIRS: Provide labor rate per hour for water heater repairs.

HOT WATER HEATER REPAIRS	
Labor Rate Per Hour	\$

Materials will be reimbursed at actual cost with an allowance for handling of materials at a percentage of actual cost. Contractor will be required to submit the actual receipt with all reimbursement requests.

Handling Cost _____% of actual materials cost.

Signature

Date

I.a. WEATHERIZATION MATERIALS SPECIFICATIONS AND PRICING QUOTE

**All materials used in provision of services must meet or exceed 10 CFR 440
Appendix A: "Standards for Weatherization Services"**

ITEM # - 105B PRODUCT: Insulated Pipe Wrap SPECIFICATIONS: 2" width X 1/8" thick, with foil back, self-adhesive. 30 feet per roll. Purchase in lots of 24-60 rolls. (Average six months usage for bidding purposes only - 50 Rolls)	VENDOR PRODUCT #: _____ PRODUCT BRAND NAME: _____ MSDS SHEETS WILL BE REQUIRED. Price per roll: _____
ITEM # - 106B PRODUCT: Foil-Grip Tape SPECIFICATIONS: 3" width, 100 linear foot rolls, butyl rubber adhesive. Purchase in lots of 6-24 rolls. (Average six months usage for bidding purposes only - 24 Rolls)	VENDOR PRODUCT #: _____ PRODUCT BRAND NAME: _____ MSDS SHEETS WILL BE REQUIRED. Price per roll: _____
ITEM # - 110A PRODUCT: Glazing Compound (tube) SPECIFICATIONS: In conformance to ASTM-C1021-01, (comparable to DAP Glazing Compound). Dispenses with standard caulking gun, 10-11 oz. cartridges. Purchase in lots of 12-36 tubes. Must be oil based. Refer to Appendix A, Page SP 8. (Average six months usage for bidding purposes only - 36 Tubes)	VENDOR PRODUCT #: _____ PRODUCT BRAND NAME: _____ MSDS SHEETS WILL BE REQUIRED. Tubes per box: _____ Price per tube: _____ _____

Initials

<p>ITEM # - 123B</p> <p>PRODUCT: Open-cell Foam Tape</p> <p>SPECIFICATIONS: 3/8" x 1/2" self-adhesive, 17 feet per roll. Purchase in lots of 24-48 rolls. Rolls must be individually packaged.</p> <p>(Average six months usage for bidding purposes only - 75 Rolls)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Price per roll: _____</p>
<p>ITEM # - 135B</p> <p>PRODUCT: Duct Tape</p> <p>SPECIFICATIONS: 2" X 60 yards, cloth or fiber reinforced. Purchase in lots of 24-72 rolls.</p> <p>(Average six months usage for bidding purposes only - 100 Rolls)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Price per roll: _____</p>
<p>ITEM # - 200A</p> <p>PRODUCT: Aluminum Weatherstrip Kit</p> <p>SPECIFICATIONS: Extruded aluminum, thermo-plastic, and rubber flap. Complete set for 36" door, 1 each header, 2 each jamb 84" long. Purchase in lots of 10-100 sets.</p> <p>(Average six months usage for bidding purposes only - 80 sets)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price each: _____</p>
<p>ITEM # - 200C</p> <p>PRODUCT: Vinyl Weatherstrip Kit</p> <p>SPECIFICATIONS: Complete set for 36" door, 1 each header, 2 each side jamb 84" long. Foam to be dark in color (comparable to Schlegel or Foam Guard FG773W). Purchase on lots of 10-100 sets.</p> <p>(Average six months usage for bidding purposes only - 40 Sets)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price each: _____</p>

Initials

<p>ITEM # - 207D</p> <p>PRODUCT: 36" Door Bottom w/drip cap</p> <p>SPECIFICATIONS: Extruded aluminum with predrilled holes for adjustment, packaged with screws. Width of 1 3/8" and a height of 1" on both sides with 1/2" height vinyl insert. Purchase in lots of 10-40.</p> <p>(Average six months usage for bidding purposes only - 50 Door Bottoms)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price each: _____</p>
<p>ITEM # - 207E</p> <p>PRODUCT: 36" Door Bottom w/drip cap</p> <p>SPECIFICATIONS: Extruded aluminum with predrilled holes for adjustment, packaged with screws. Width of 1 3/4" and a height of 1" on both sides with 1/2" height vinyl insert. Purchase in lots of 10-40.</p> <p>(Average six months usage for bidding purposes only - 50 Door Bottoms)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price each: _____</p>
<p>ITEM # - 215E</p> <p>PRODUCT: Oak Lowboy Threshold</p> <p>SPECIFICATIONS: Length 36", width 3 1/2" height 3/4". Must be solid oak construction. Purchase in lots of 10- 20.</p> <p>(Average six months usage for bidding purposes only - 25 Thresholds)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price each: _____</p>

Initials

<p>ITEM # - 215G</p> <p>PRODUCT: Oak Highboy Threshold</p> <p>SPECIFICATIONS: Length 36", width 3 1/2" height 1 1/16. Must be solid oak construction. Purchase in lots of 10-20.</p> <p>(Average six months usage for bidding purposes only - 50 Thresholds)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price each: _____</p>
<p>ITEM # - 226A</p> <p>PRODUCT: Lockset/Keyed Entry</p> <p>SPECIFICATIONS: Universal backset, keyed separately with pairing capabilities, brass finish. Backset to be 1" barrel round, drive-in type latch bolts. Latch bolt must be adjustable. (Mortise backset will not be accepted). Attachment screws must be visible and accessible on outer face of interior collar for quick installation. Purchase in lots of 20-40.</p> <p>(Average six months usage for bidding purposes only - 50 Sets)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price each: _____</p>

Initials

<p>ITEM # - 248</p> <p>PRODUCT: Mobile Home Door</p> <p>SPECIFICATIONS: Must be an out swing door for either left or right hand swing, with strong welded aluminum frame and foam filled insulation for high R-value. Must be double weatherstrip with one seal on frame and one on door. Door accessories to include keyed lock with adjustable striker, door chain, threshold, and safety glass picture window for viewing. Minimum size of window 3" X 20". Must be able to special order odd sizes. Will purchase in lots of 1-5 doors.</p> <p>(Average six months usage for bidding purposes only - 15 Doors)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Does Door Meet Specifications:</p> <p>Price the following sizes:</p> <p>28"X72" _____</p> <p>30"X72" _____</p> <p>30"X74" _____</p> <p>32"X72" _____</p> <p>32"X74" _____</p> <p>32"X76" _____</p> <p>Prices must be freight included as specified on cover letter.</p>
<p>ITEM # - 340B</p> <p>PRODUCT: Dryer Vent Hose</p> <p>SPECIFICATIONS: 4" vent hose. 20-25 linear feet per box. Aluminum multi-layered flexible metallic duct. Operating temperature range of 0°F-265°F. Fire retardant with no exposed polyester inside or outside. AGA and UL Approved for Gas. Purchase in lots of 1-10 boxes.</p> <p><u>Please Note New Specifications for Dryer Vent Hose</u></p> <p>(Average six months usage for bidding purposes only - 400 L/F)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Linear ft. per box: _____</p> <p>Price per box: _____</p>

Initials

<p>ITEM # - 341</p> <p>PRODUCT: Dryer Vent Hood</p> <p>SPECIFICATIONS: White in color. 4" throat, damper action, plastic construction, must have a min. of 5 3/4" faceplate, and must have a min. of 8" throat tube, <u>louvered preferred</u>. Purchase in lots of 12-24 each.</p> <p>(Average six months usage for bidding purposes only - 60 Vents)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price each: _____</p>
<p>ITEM # - 400</p> <p>PRODUCT: Water Heater Blanket</p> <p>SPECIFICATIONS: In conformance to ASTM-C553-02 Minimum R-value of 11. 40 - 60 gallon electrical water heater <u>blanket with top</u>. Purchase in lots of 5-10 each. Refer to Appendix A, Page SP 6.</p> <p>(Average six months usage for bidding purposes only - 5 blankets)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Price each: _____</p>
<p>ITEM # - 404B</p> <p>PRODUCT: Furnace Heat Duct Insulation</p> <p>SPECIFICATIONS: In conformance to ASTM-C553-02 minimum R-value of 11, 48" width/50' roll with vinyl backing. Purchase in lots of 5-10 rolls. Refer to Appendix A, page SP 6.</p> <p>(Average six months usage for bidding purposes only - 30 rolls)</p>	<p>VENDOR PRODUCT#: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>R-Value: _____</p> <p>Price per roll: _____</p>

Initials

<p>ITEM # - 406</p> <p>PRODUCT: Plastic Tie Straps</p> <p>SPECIFICATIONS: Min length 32" max. length 36", adjustable, removable. White or clear in color. Purchase in lots of 500-1000.</p> <p>(Average six months usage for bidding purposes only - 2000 Straps)</p>	<p>VENDOR PRODUCT#:_____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price each:_____</p>
<p>ITEM # - 408</p> <p>PRODUCT: Fiberglass Blow-In Insulation</p> <p>SPECIFICATIONS: Meets all applicable fireproof requirements, see attached sheet for minimum specifications. Refer to Appendix A, page SP 1. Purchase in 25-100 bags.</p> <p>(Average six months usage - for bidding purposes only - 1000 bags)</p>	<p>VENDOR PRODUCT #:_____</p> <p>PRODUCT BRAND NAME: _____</p> <p>SHOW CALCULATION ON PAGE SP 1.</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Weight per bag:_____</p> <p>Price per bag:_____</p>
<p>ITEM # - 409D</p> <p>PRODUCT: Fiberglass Insulation (Batts)</p> <p>SPECIFICATIONS: In conformance to ASTM-C665-06, R-11, 15" wide, kraft faced, specify square foot coverage per roll. Purchase in lots of 1-10 rolls. Refer to Appendix A, page SP 5 (3 1/2 X 15)</p> <p>(Average six months usage for bidding purposes only - 48 Rolls)</p>	<p>VENDOR PRODUCT #:_____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Sq ft per roll:_____</p> <p>Price per roll:_____</p>

Initials

<p>ITEM # - 410D</p> <p>PRODUCT: Fiberglass Insulation (Batts)</p> <p>SPECIFICATIONS: In conformance to ASTM-C665-06, R-11, 23" wide, kraft faced, specify square foot coverage per roll. Purchase in lots of 1-10 rolls. Refer to Appendix A, page SP 5 (3 1/2 X 23)</p> <p>(Average six months usage for bidding purposes only - 48 Rolls)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Sq ft per roll: _____</p> <p>Price per roll: _____</p>
<p>ITEM # - 413D</p> <p>PRODUCT: Fiberglass Insulation (Batts)</p> <p>SPECIFICATIONS: In conformance to ASTM-C665-06, R-19, 15" wide, kraft faced, specify square foot coverage per roll. Purchase in lots of 4-40 rolls. Refer to Appendix A, page SP 5 (6 X 15)</p> <p>(Average six months usage for bidding purposes only - 120 Rolls)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Sq ft per roll: _____</p> <p>Price per roll: _____</p>
<p>ITEM # - 414D</p> <p>PRODUCT: Fiberglass Insulation (Batts)</p> <p>SPECIFICATIONS: In conformance to ASTM-C665-06, R-19, 23" wide, kraft faced, specify square foot per roll. Purchase in lots of 4-40 rolls. Refer to Appendix A, page SP 5 (6 x 23)</p> <p>(Average six months usage for bidding purposes only - 120 Rolls)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Sq ft per roll: _____</p> <p>Price per roll: _____</p>

Initials

<p>ITEM # - 417D</p> <p>PRODUCT: Fiberglass Insulation (Batts)</p> <p>SPECIFICATIONS: In conformance to ASTM-C665-06, R-25, 15" wide, kraft faced, specify square foot per roll. Purchase in lots of 4-40 rolls. Refer to Appendix A, page SP 5 (8 X 15)</p> <p>(Average six months usage for bidding purposes only - 100 Rolls)</p>	<p>VENDER PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Sq ft per roll: _____</p> <p>Price per roll: _____</p>
<p>ITEM # - 418D</p> <p>PRODUCT: Fiberglass Insulation (Batts)</p> <p>SPECIFICATIONS: In conformance to ASTM-C665-06, R-25, 23" wide, kraft faced, specify square foot per roll. Purchase in lots of 4-40 rolls. Refer to Appendix A, page SP 5 (8 X 23)</p> <p>(Average six months usage for bidding purposes only - 100 Rolls)</p>	<p>VENDER PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Sq ft per roll: _____</p> <p>Price per roll: _____</p>
<p>ITEM # - 422D</p> <p>PRODUCT: Fiberglass Insulation (Batts)</p> <p>SPECIFICATIONS: In conformance to ASTM-C665-06, R-30, 15" wide, kraft faced, specify square foot coverage per roll. Purchase in lots of 4-40 rolls. Refer to Appendix A, page SP 5. (9" X 15").</p> <p>(Average six months usage for bidding purposes only - 100 Rolls)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Sq ft per roll: _____</p> <p>Price per roll: _____</p>

Initials

<p>ITEM # - 423D</p> <p>PRODUCT: Fiberglass Insulation (Batts)</p> <p>SPECIFICATIONS: In conformance to ASTM-C665-06, R-30, 23" wide, kraft faced, specify square foot coverage per roll. Purchase in lots of 4-40 rolls. Refer to Appendix A, page SP 5. (9" X 23").</p> <p>(Average six months usage for bidding purposes only - 40 Rolls)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Sq ft per roll: _____</p> <p>Price per roll: _____</p>
<p>ITEM # - 426D</p> <p>PRODUCT: Fiberglass Insulation (Batts)</p> <p>SPECIFICATIONS: In conformance to ASTM-C665-06, R-38, 15" wide, kraft faced, specify square foot coverage per roll. Purchase in lots of 4-40 rolls. Refer to Appendix A, page SP 5. (12" X 15").</p> <p>(Average six months usage for bidding purposes only - 40 Rolls)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Sq ft per roll: _____</p> <p>Price per roll: _____</p>
<p>ITEM # - 427D</p> <p>PRODUCT: Fiberglass Insulation (Batts)</p> <p>SPECIFICATIONS: In conformance to ASTM-C665-06, R-38, 23" wide, kraft faced, specify square foot coverage per roll. Purchase in lots of 4-40 rolls. Refer to Appendix A, page SP 5. (12" X 23").</p> <p>(Average six months usage for bidding purposes only - 40 Rolls)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Sq ft per roll: _____</p> <p>Price per roll: _____</p>

Initials

<p>ITEM # - 431</p> <p>PRODUCT: Cellulose Blow-In Insulation</p> <p>SPECIFICATIONS: Meets all applicable fireproof requirements, see attached sheet for minimum specifications. Refer to Appendix A, page SP 2. Purchase in quantities, 400-700 bags.</p> <p>(Average six months usage - for bidding purposes only - 3000 bags)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>SHOW CALCULATION ON PAGE SP 2.</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Price per bag: _____</p>
<p>ITEM # - 434A</p> <p>PRODUCT: 20" Insulation Guard</p> <p>SPECIFICATIONS: Aluminum Rolled Valley Flashing. 50 linear feet per roll. 30 gauge, comparable to Insul-Shield. Purchase in lots of 1-12 rolls. (Comparable to Insul-Shield)</p> <p>(Average six months usage for bidding purposes only - 700 L/F)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price per roll: _____</p>
<p>ITEM # - 438B</p> <p>PRODUCT: Black Visqueen (Polyethylene)</p> <p>SPECIFICATIONS: 6 mil. Thickness, 10' x 100' rolls. Black. Visqueen must have minimum width of 36" which folds out to 10'. Purchase in lots of 5-40 rolls.</p> <p>(Average six months usage for bidding purposes only - 40 Rolls)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Price per roll: _____</p>

Initials

<p>ITEM # - 439</p> <p>PRODUCT: Clear Visqueen (Polyethylene)</p> <p>SPECIFICATIONS: 6 mil. Thickness, 10' x 100' rolls. Clear. Visqueen must have minimum width of 36" which folds out to 10'. Purchase in lots of 5-40 rolls.</p> <p>(Average six months usage for bidding purposes only - 40 Rolls)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Price per roll: _____</p>
<p>ITEM # - 481B</p> <p>PRODUCT: Tubular Pipe Insulation</p> <p>SPECIFICATIONS: 3/4" wall, 7/8" x 6 inside diameter. Must have a minimum R-value of 4.7. Specify Linear feet per box and the R-value. Purchase in lots of 500-2000 linear feet, in 6' lengths (Conformance to ASTM-C534-07a). Refer to Appendix A, page SP 6.</p> <p>(Average six months usage for bidding purposes only - 4500 L/F)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>R-Value: _____</p> <p>L/F per box: _____</p> <p>Price per L/F: _____</p>
<p>ITEM # - 501</p> <p>PRODUCT: Roof Cement</p> <p>SPECIFICATIONS: Fiber reinforced mastic adhesive, applicable to wet/dry surfaces, remain flexible after application, applied with trowel. Purchase in 5 gallon cans, 5-25 gallons.</p> <p>(Average six months usage for bidding purposes only - 20 gallons)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Price per 5 gal: _____</p>

Initials

<p>ITEM # - 506</p> <p>PRODUCT: Roof Patch</p> <p>SPECIFICATIONS: Dispenses with standard caulking gun, 10-11 oz. cartridges, adheres to metal and all typical roofing materials, working temperature 30⁰-90⁰ F. Must be able to apply to wet surfaces. (Comparable to Black Jack.) Purchase in lots of 12-60 tubes.</p> <p>(Average six months usage for bidding purposes only - 120 Tubes)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Tubes per box: _____</p> <p>Price per tube: _____</p>
<p>ITEM # - 600B</p> <p>PRODUCT: Gable End Vents</p> <p>SPECIFICATIONS: 12" X 12" overall dimension louvered with 1/8" screen. <u>Minimum of 28 gauge, galvanized metal</u> construction, recessed mount. Purchase in lots of 6-12 vents.</p> <p>(Average six months usage for bidding purposes only - 30 Vents)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price each: _____</p>
<p>ITEM # - 600D</p> <p>PRODUCT: Gable End Vents</p> <p>SPECIFICATIONS: 14" X 24" overall dimension louvered with 1/8" screen. <u>Minimum of 28 gauge, galvanized metal</u> construction, recessed mount. Purchase in lots of 6-12 vents.</p> <p>(Average six months usage for bidding purposes only - 30 Vents)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price each: _____</p>

Initials

<p>ITEM # - 703B</p> <p>PRODUCT: 2 1/4" Window Casing</p> <p>SPECIFICATIONS: Streamline style, pine, (finger-jointed), <u>7' lengths</u>. Specify price per linear foot. Purchase in lots of 100-400 feet.</p> <p>(Average six months usage for bidding purposes only –100-400 L/F)</p>	<p>VENDOR PRODUCT #:_____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price per L/F:_____</p>
<p>ITEM # - 750B</p> <p>PRODUCT: 1" X 2" Lumber</p> <p>SPECIFICATIONS: 5/8" X 1 3/4", (finger jointed), pine, <u>8' lengths</u>. Purchase in lots of 200-800 linear feet.</p> <p>(Average six months usage for bidding purposes only - 1000 L/F)</p>	<p>VENDOR PRODUCT #:_____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price per L/F:_____</p>
<p>ITEM # - 751B</p> <p>PRODUCT: 1" X 4" Lumber</p> <p>SPECIFICATIONS: Pine, <u>8' lengths</u>, (finger-jointed). Specify price per linear foot. Purchase in lots of 100-400 linear feet.</p> <p>(Average six months usage for bidding purposes only - 1000 L/F)</p>	<p>VENDOR PRODUCT #:_____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price per L/F:_____</p>
<p>ITEM # - 753B</p> <p>PRODUCT: 1" X 6" Lumber</p> <p>SPECIFICATIONS: Pine, <u>8' lengths</u>, (finger-jointed). Specify price per linear foot. Purchase in lots of 100-400 linear feet.</p> <p>(Average six months usage for bidding purposes only - 600 L/F)</p>	<p>VENDOR PRODUCT #:_____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price per L/F:_____</p>

Initials

<p>ITEM # - 761B</p> <p>PRODUCT: 2" X 4" Lumber</p> <p>SPECIFICATIONS: Fur, <u>8' lengths</u>, (standard or better). Specify price per linear foot. Purchase in lots of 40-160 linear feet.</p> <p>(Average six months usage for bidding purposes only - 500 L/F)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price per L/F: _____</p>
<p>ITEM # - 772B</p> <p>PRODUCT: 1/2" Treated Plywood</p> <p>SPECIFICATIONS: 4' X 8' sheets, 1/2" all-weather wood plywood. Purchase in lots of 5-10 sheets.</p> <p>(Average six months usage for bidding purposes only - 25 Sheets)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Price per sheet: _____</p>
<p>ITEM # - 773B</p> <p>PRODUCT: 3/4" Plywood</p> <p>SPECIFICATIONS: Shop grade plywood. 4'x8' sheets. Purchase in lots of 1-10.</p> <p>(Average six months usage for bidding purposes only - 10 sheets)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price per sheet: _____</p>
<p>ITEM # - 775B</p> <p>PRODUCT: 1/2" Plywood</p> <p>SPECIFICATIONS: CDX Plywood, 4' X 8' sheets. Purchase in lots of 1-10 sheets.</p> <p>(Average six months usage for bidding purposes only - 24 Sheets)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price per sheet: _____</p>

Initials

<p>ITEM # - 776B</p> <p>PRODUCT: 1/2" Gypsum Board</p> <p>SPECIFICATIONS: 4' X 8' sheets. Purchase in lots of 1-10 sheets. Must meet Fire Codes Conformance to FS HH-I-1972/3.</p> <p>(Average six months usage for bidding purposes only - 40 sheets)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>MSDS SHEETS WILL BE REQUIRED.</p> <p>Price per sheet: _____</p>
<p>ITEM # - 785B</p> <p>PRODUCT: Wood Lath</p> <p>SPECIFICATIONS: 3/8" X 1 1/2" X 48" long wood lath strips. Fifty pieces per bundle. Purchase in lots of 5-20 bundles.</p> <p>(Average six months usage for bidding purpose only - 100 bundles)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Pieces per bundle: _____</p> <p>Price per bundle: _____</p>
<p>ITEM # - 851</p> <p>PRODUCT: Double Strength Glass</p> <p>SPECIFICATIONS: 4' X 7' lites. Purchase in lots of 5-10 sheets. Federal Specification ASTM C1036-06</p> <p>(Average six months usage for bidding purposes only - 1 Crate)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price per lite: _____</p>
<p>ITEM # - 954</p> <p>PRODUCT: 3/4" x #8 Hex head Screws</p> <p>SPECIFICATIONS: Rust proof with slotted heads. Must be in boxes of 100 screws per box. Purchase in lots of 20-100 boxes.</p> <p>(Average six months usage for bidding purposes only - 100 Boxes)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price per box of 100: _____</p>

Initials

<p>ITEM # - 955</p> <p>PRODUCT: 1 1/2" X #8 Hexhead Screws</p> <p>SPECIFICATIONS: Rust proof with slotted heads. Must be in boxes of 100 screws per box. Purchase in lots of 20-100 boxes.</p> <p>(Average six months usage for bidding purposes only - 50 Boxes)</p>	<p>VENDOR PRODUCT #: _____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Price per box of 100: _____</p>
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Initials

<p>ITEM # - Specials</p> <p>PRODUCT: Replacement Vinyl Windows</p> <p>SPECIFICATIONS: In conformance with specifications on SP 3 of Appendix A. Glazed with 3/4" insulated, Low-E glass, screens provided with all sliding and casement units, minimum 1" fins, custom sizes available, (made to size).</p> <p>Price the sizes listed to the right using the multiplier. Bid award will be determined on an average price per square foot.</p> <p><u>Please Note Vinyl Casement Window Request for Bid</u></p> <p>PRODUCT: Vinyl Casement Windows</p> <p>SPECIFICATIONS: Casement to include hardware to crank window in/out, with Egress Hinges, and Low-E glass.</p>	<p>VENDOR PRODUCT #:_____</p> <p>PRODUCT BRAND NAME: _____</p> <p>Type of Frame:_____</p> <p>Multiplier:_____</p> <p><u>Window price sheet must be enclosed.</u></p> <p>HS 34" x 36" _____</p> <p>HS 22" x 14" _____</p> <p>XOX 78" x 28" _____</p> <p>Pic.44" x 44" _____</p> <p>VS 28" x 38" _____ (Obscure)</p> <p>HS 36" x 34" _____ (Obscure)</p> <p>Casement with Egress Hinges</p> <p>Multiplier: _____</p> <p>30" x 40" _____</p> <p>36" x 54" _____</p>
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Signature

Date

I.b. WEATHERIZATION BASKET BUILDING MATERIALS PRICING QUOTE

All materials used in provision of services must meet or exceed 10 CFR 440 Appendix A: "Standards for Weatherization Services"

Vendor is responsible for providing materials to the required specifications and includes Material Safety Data Sheets (MSDS) where applicable. If at any time the product fails to meet specifications, Agency reserves the right to cancel all orders for bid period.

Material purchases will be based on a per job work order and prices guaranteed for _____ months after notice to proceed order to commence.

Detailed below is a list of materials that represents standard materials used for a typical job. The purpose of the quotation is to identify a designated vendor(s) that can provide the materials at the lowest cost to the agency. Price to include taxes (If Applicable).

<i>Description of Materials</i>	<i>Unit Cost</i>	<i>Quantity</i>	<i>Total Cost</i>
Duct Mastic – 1 gallon bucket		2	
Blown cellulose 27lbs. bag		30 bags	
Caulk – siliconized latex 11 oz cartridge		5 tubes	
Air filters – Natural fiber re-usable & washable filter 20" x 20" x 1"		1 filter	
Black Visqueen (Polyethylene) 6 mil. Thickness, 10' x 100' roll		1 roll	
Gable end louvered vents 14" x 24" recessed mount, 28 gauge galvanized		2	
Vinyl Weather-strip Kit		2	
Plywood 4' x 8' x 1/2" sheet, cdx grade		1 sheet	
Smoke Detector, 9 volt battery		1	
CO Detector, 110 volt plug-in w/9 volt battery		1	
Glazing, 24" x 24" piece of double strength glass (4 sq. ft.)		1 pcs.	
Glazing compound, 11 oz tube		1 tube	
R 30 X 16" kraft faced fiberglass		14 rolls	
Compact Fluorescent Bulb (18 watt)		5 bulbs	
Lockset- keyed entrance (adjustable)		1	
		Total Cost	

Signature

Date

I.c. WEATHERIZATION PRICING QUOTE

**All materials used in provision of services must meet or exceed 10 CFR 440
Appendix A: "Standards for Weatherization Services"**

Detailed below is the work to be performed on an individual house.

Contractor is responsible for leaving the job site clean, hauling away job debris, and existing equipment (if applicable) and for properly disposing of existing equipment or debris to meet EPA regulations.

Project commencement and completion must be accomplished within _____ working days of notice to proceed. Contractor is to notify agency as soon as project is completed for inspection.

Contractor must include permit fees (if applicable), sales taxes, labor and materials to complete project.

Description of Work	Total Cost
Seal all duct connections including drywall to boot connections and plenum to air handler both supply and return side.	
Insulate 1,500 sq ft attic with blown cellulose; bring to an R-50 from an R-18 and add 2- 14" X 24" louvered vents to gable ends for attic ventilation. Seal all by-pass and install non-flammable shielding around any heat producing devices.	
Insulate 1,500 sq ft floor with fiberglass kraft faced batt R-30 X 16" OC, well secured with twine, wood strips or wire insulation supports and install black 6 mill polyethylene ground moisture barrier.	
Air filters – replace existing air filter and clean air handler area before installing with new all natural fiber washable and re-useable 20" x 20" x 1"	
Install two windows - Insulated, Low-E, White Vinyl 36" x 60" Horizontal slider windows and replace interior trim and casing lumber with new. Windows meet egress code. (Note: LSW applies to this project).	
Install one 1 ¾" exterior wood solid core door 36" x 80", standard jam with new 2 ¾" keyed entrance lockset, weather-strip kit, oak threshold and door shoe. (Note: LWS applies to this project).	
Install one 40 gallon gas water heater to include properly sized water and gas lines, combustion air, venting, pressure relief valve & electrical hook-up to meet code requirements	
Install 5- 18 watt CFL bulbs	
TOTAL COST	

Signature

Date

J. OVERVIEW OF EVALUATION OF OFFERORS

Quotations can be evaluated based on cost only or factors in addition to cost can be incorporated in the evaluation. Each agency must decide **PRIOR TO ISSUEING THE SOLICITATION** how they will be evaluating all offerors.

If minimum requirements have been established (requirements must be included in the solicitation) any offerors that do not meet the minimum requirements are not evaluated. 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 we have established criteria other than cost for several of the measures. We will also be using a sample house in the evaluation of some of the measures. The examples provided will show how the criterion is applied in the evaluation. Detailed below is the sample house and criteria we will be using in some of the evaluations.

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 WHICH INCLUDES FACTORS IN ADDITION TO COST

Criteria

Cost	60 points
Background and Experience	30 points
References	7 points
Preference	<u>3 points</u>

Offeror A has 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 has 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 has 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 has 2 years experience, three references were excellent, and is not minority; women owned or reside in a labor surplus area.

Offeror E has 5 years experience, three references were excellent, and a women owned business.

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

Criteria	Offeror A	Offeror B	Offeror C	Offeror D	Offeror E
Background and Experience	24	30	27	18	21
References	6	6	6	7	7
Preference	0	0	0	0	3
Total Points	30	36	33	25	31

J.b. 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 LSW practices with wall insulation						
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.						
If you had decided to use other criteria that just cost the evaluation would be done as detailed below.						
	Offeror	Offeror	Offeror	Offeror	Offeror	
Criteria	A	B	C	D	E	
Cost - 60 points	51	54	60	48	57	
Background and Experience - 30 points	24	30	27	18	21	
References - 7 points	6	6	6	7	7	
Preference - 3 points	0	0	0	0	3	
	81	90	93	73	88	
In the second example Offeror C would be the primary contractor. If multiple contractors are used the following order of selection would be Offeror B, Offeror E, Offeror A, and last Offeror D						

J.c. PRESSURE DIAGNOSTIC GUIDED-DIRECTED AIR SEALING						
		Offeror	Offeror	Offeror	Offeror	Offeror
Sample House Air Sealing	Quantity	A	B	C	D	E
Seal Duct connections to air handler both supply and return	10	\$320.75	\$350.00	\$325.00	\$385.00	\$335.00
Install air barrier	10 sq ft	\$55.00	\$64.75	\$50.00	\$62.00	\$47.00
Install 90 cfm fan	1	\$176.75	\$180.00	\$169.00	\$192.50	\$173.25
Total Cost		\$ 552.50	\$ 594.75	\$ 544.00	\$ 639.50	\$ 555.25
Price includes all materials, labor, permit fees, and sales taxes						

J.d. DOOR AND WINDOW QUOTATION EVALUATION SHEET						
		Offeror	Offeror	Offeror	Offeror	Offeror
Sample House Windows and Doors	Quantity	A	B	C	D	E
1- 3/4" Wood Solid Core Door - 36' x 80", standard jam (1)	1	\$485.10	\$505.95	\$496.75	\$493.50	\$495.95
Windows - Insulated, LowE, White Vinyl 36" x 60" (2)	2	\$598.00	\$575.45	\$567.66	\$577.00	\$584.75
Total Door and Window Cost		\$1,083.10	\$1,081.40	\$1,064.41	\$1,070.50	\$1,080.70
Price includes all materials, labor, permit fees, sales taxes and LSW (if applicable)						
<p><i>In the example Offeror C would be the primary contractor. If multiple contractors are used the following order of selection would be Offeror D, Offeror E, Offeror B, and last Offeror A.</i></p>						

J.e. SOLAR SUN SCREENS EVALUATION						
		Offeror	Offeror	Offeror	Offeror	Offeror
Sample House Solar Screens	Quantity	A	B	C	D	E
Solar Sun Screens	400 sq ft	\$1,500.00	\$1,420.00	\$1,600.00	\$1,480.00	\$1,400.00
Additional Charge, if applicable		\$25.00	\$35.00	\$50.00	\$25.00	\$30.00
Total Solar Sun Screens Cost		\$1,525.00	\$1,455.00	\$1,650.00	\$1,505.00	\$1,430.00
Price includes all materials, labor, permit fees, sales taxes and LSW practices with wall insulation.						
<i>In the example Offeror E would be the primary contractor. If multiple contractors are used the following order of selection would be Offeror B, Offeror D, Offeror A, and last Offeror C.</i>						

J.f. REFLECTIVE ROOF COATING						
		Offeror	Offeror	Offeror	Offeror	Offeror
Sample House Reflective Roof Coating	Quantity	A	B	C	D	E
Install elastomeric reflective roof coating	980 sq. ft.	\$425.00	\$375.00	\$350.00	\$400.00	\$500.00
Price includes all materials, labor, permits fees, sales taxes						
<p><i>In the example Offeror C would be the primary contractor. If multiple contractors are used the following order of selection would be Offeror B, Offeror D, Offeror A, and last Offeror E.</i></p>						

J.g. HVAC QUOTATION EVALUATION SHEET						
		Offeror	Offeror	Offeror	Offeror	Offeror
Sample House HVAC	Quantity	A	B	C	D	E
Installation of 83% 75,000 btu forced air natural gas furnace	1	\$2,475.50	\$2,333.75	\$2,250.00	\$2,655.55	\$2,295.00
Install R-11 Vinyl Duct wrap over 175 l/f 6"supply & return ducts	1	\$510.00	\$480.75	\$455.75	\$509.99	\$475.50
Total HVAC Cost		\$2,985.50	\$2,814.50	\$2,705.75	\$3,165.54	\$2,770.50
Price includes all materials, labor, permit fees, sales taxes, electrical hook-up and properly disposing of existing equipment to meet EPA regulations(if applicable)						
<i>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.</i>						

J.h. ELECTRIC BASE LOAD MEASURES						
		Offeror	Offeror	Offeror	Offeror	Offeror
Sample House EBLM	Quantity	A	B	C	D	E
Replace 18 Cu. Ft. Refrigerator with same size	1	\$650.00	\$595.99	\$489.99	\$525.00	\$495.99
Install 18 watt CFL bulbs	5	\$35.00	\$33.50	\$27.00	\$34.50	\$28.75
Total EBLM Cost		\$ 685.00	\$ 629.49	\$ 516.99	\$ 559.50	\$ 524.74
Price includes all materials, labor, permit fees, sales taxes, electrical hook-up and properly disposing of existing equipment to meet EPA regulations						
<i>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 D, Offeror B, and last Offeror A.</i>						

J.i. Natural Gas Hot Water Heater Replacement						
		Offeror	Offeror	Offeror	Offeror	Offeror
Sample House Hot Water Heater	Quantity	A	B	C	D	E
40 gallon gas water heater to include properly sized water and gas lines, combustion air, venting, pressure relief valve & electric hook up to code	1	\$775.50	\$810.95	\$756.00	\$787.90	\$825.00
Replace 90 CFM bath fan with .7 low sones 90 CFM fan.	1	210.90	177.50	169.00	175.99	172.25
Price includes all materials, labor, permits fees, sales taxes						
<i>In the example Offeror C would be the primary contractor. If multiple contractors are used the following order of selection would be Offeror A, Offeror D, Offeror B, and last Offeror E.</i>						

J. j. 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 - l/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 - l/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 - l/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 - l/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 - l/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- l/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.											

J.k. MATERIALS ONLY INDIVIDUAL HOUSE PURCHASE EVALUATION					
	Offeror	Offeror	Offeror	Offeror	Offeror
Sample House Weatherization Materials	A	B	C	D	E
Individual House Weatherization Materials Only	\$833.66	\$775.75	\$749.35	\$865.99	\$795.99
<i>In the example Offeror C would be the primary contractor. If multiple contractors are used the following order of selection would be Offeror B, Offeror E, Offeror A, and last Offeror D.</i>					

OFFEROR C			
SINGLE HOUSE MATERIALS ONLY			
Description of Materials	Unit Cost	Quantity	Total Cost
Duct Mastic - 1 gallon bucket	\$20.00	2	\$40.00
Blown cellulose 27 lbs bag	\$5.20	30 bags	\$156.00
Caulk - siliconized latex	\$2.28	5 tubes	\$11.40
Air filters 20" x 20" x 1"	\$3.24	1 filter	\$3.24
Black Visqueen 10' x 100' roll	\$34.50	1 roll	\$34.50
Gable end louvered vents (14" x 24", 28 gauge)	\$21.69	2	\$43.38
Vinyl Weather-strip Kit	\$2.36	2	\$4.72
Plywood 4' x 8' x 1/2" cdx grade	\$16.48	1 sheet	\$16.48
Smoke Detector, 9 volt battery	\$5.25	1	\$5.25
CO Detector, 110 volt plug-in w/9 volt battery	\$38.75	1	\$38.75
Glazing, 24" x 24" piece of double strength glass	\$1.25	1 piece	\$5.00
Glazing compound, 11 oz tube	\$2.10	1 tube	\$2.10
R 30 x 16" kraft faced fiberglass	\$26.12	14 rolls	\$356.68
Compact Fluorescent Bulb (18 watt)	\$2.06	5 bulbs	\$10.30
Lockset-keyed entrance (adjustable)	\$21.55	1	\$21.55
Total Cost			\$749.35

J.I. WEATHERIZE INDIVIDUAL HOUSE EVALUATION					
	Offeror	Offeror	Offeror	Offeror	Offeror
Sample House Weatherization	A	B	C	D	E
Whole House Weatherization	\$4,610.75	\$4,589.00	\$4,516.41	\$4,545.50	\$4,555.70
Total Whole House Weatherization					
Price includes all materials, labor, permit fees, sales taxes and LSW (if applicable)					
<i>In the example Offeror C would be the primary contractor. If multiple contractors are used the following order of selection would be Offeror D, Offeror E, Offeror B, and last Offeror A.</i>					
If you had decided to use other criteria that just cost the evaluation would be done as detailed below.					
	Offeror	Offeror	Offeror	Offeror	Offeror
Criteria	A	B	C	D	E
Cost - 60 points	48	51	60	57	54
Background and Experience - 30 points	24	30	27	18	21
References - 7 points	6	6	6	7	7
Preference - 3 points	0	0	0	0	3
	78	87	93	82	85
<i>In the second example Offeror C would be the primary contractor. If multiple contractors are used the following order of selection would be Offeror B, Offeror E, Offeror D, and last Offeror A</i>					

SAMPLE ADVERTISEMENT

(INSERT AGENCY NAME) is accepting RFQ's for the Weatherization Assistance Program. Please contact *(INSERT INDIVIDUAL'S NAME)* at *(INSERT TELEPHONE NUMBER)* to request an application and the RFQ General Instructions. *(INSERT AGENCY NAME)* encourages M/WBE, and Labor Surplus Area Firms to apply. All applications must be received by *(INSERT AGENCY NAME)* by *(INSERT DATE AND TIME)*. Late RFQs will not be considered.

SAMPLE PROCUREMENT PROCEDURES

A. DETERMINATION OF PROCUREMENT METHODS

PURPOSE: The purpose is to establish the appropriate procurement method to be used for the goods or services to be purchased. The methods allowable comply with agency, state and federal regulation requirements.

PROCEDURES:

Program Director

1. Establish cost estimate for the purchase in the aggregate and submit to Contract Officer.

Finance Officer

2. Select the appropriate method for the procurement.
 - a. \$5,000 in the aggregate and lower will follow small purchase procedures.
 - b. \$5,000 in the aggregate, and over follow Steps C-H.
3. Submit description and cost estimate for approval.

Administration

4. Authorize purchases over \$5,000 and Program Director will authorize purchases under \$5,000.

ADDITIONAL INFORMATION:

1. In the aggregate is the total amount through single or multiple purchases of the item(s) for the program period, i.e. training books - 12 purchases per year @ \$500 per purchase is an aggregate amount of \$6,000.
2. The Finance Officer will serve as Contracts Officer.
3. Allowable methods of large procurement.

- a. Sealed Bids
 - Advertisement of IFB
 - Conditions
 - Award must be made to lowest bidder
 - b. Competitive Proposals
 - Advertisement of RFP or RFQ
 - Conditions
 - Award of Contract based on multiple criteria.
4. Noncompetitive proposals are those where only one bid is received or only one source is solicited.
5. Noncompetitive proposals must be used only when it is infeasible under small purchase procedures, sealed bids, or competitive proposals and one of the following applies:
- a. Only available from a single source.
 - b. Emergency exists.
 - c. Awarding agency authorizes noncompetitive proposal.

FORMS:

- 1. Agency cost estimate and description.

COST ESTIMATE AND DESCRIPTION

SERVICES/GOODS TO BE PURCHASED:_____

ESTIMATED COST: \$_____

BASIS FOR ESTIMATION:_____

APPROVED:

Executive Director's Signature

Contract Officer's Signature

B. SMALL PURCHASE PROCEDURES

PURPOSE: To provide guidance to Program Directors making small purchases. Small purchase procedures are those relatively simple and informal procurement methods for securing services, supplies, or other property that do not cost more than \$5,000 in the aggregate.

PROCEDURES:

Program Director

1. For purchases under \$100 in the aggregate:
 - a. At the Program Director's discretion, observe agency internal controls governing P.O.'s and payment of invoices.
2. For purchases from \$100 to \$1,000:
 - a. List description of item to be purchased on quote sheet.
 - b. Obtain a minimum of three telephone or written (includes catalogs) cost quotes for the purchase. The quotation must meet the description.
 - c. Make recommendation based on price or provide justification for not accepting low cost.
 - d. Obtain approval of Administration designee and Finance Officer.
 - e. Make purchase.
3. For purchases over \$1,000, but under \$5,000:
 - a. Develop description of item(s) to be purchased on specifications sheet.
 - b. Determine whether bids should be advertised or solicited. (If there are relatively few vendors it may save time and money to solicit bids). If it is determined that advertised bids will be obtained follow procedures C-H. Local advertisement for bids may be made when you may not have identified all possible vendors.

Administration

- c. Sign-off approval.

FORMS:

1. Cost Quotation

COST QUOTATION

DATE:	
DESCRIPTION OF ITEM TO BE PURCHASED	
VENDOR'S NAME	
PERSON PROVIDING QUOTE	
ITEM (BRAND NAME & MODEL)	
QUOTE	\$
ADDITIONAL INFORMATION:	

DATE:	
DESCRIPTION OF ITEM TO BE PURCHASED	
VENDOR'S NAME	
PERSON PROVIDING QUOTE	
ITEM (BRAND NAME & MODEL)	
QUOTE	\$
ADDITIONAL INFORMATION:	

DATE:	
DESCRIPTION OF ITEM TO BE PURCHASED	
VENDOR'S NAME	
PERSON PROVIDING QUOTE	
ITEM (BRAND NAME & MODEL)	
QUOTE	\$
ADDITIONAL INFORMATION:	

DECISION

VENDOR CHOSEN	ITEM CHOSEN (Brand and Model)	QUOTE (Justify if Quote is not the lowest)	LOWEST

REQUESTED BY:

Date:_____

APPROVED BY:

Date:_____

C. BID/PROPOSAL PACKAGE

PURPOSE: To establish the process for development of a standard bid package for goods and services.

PROCEDURES:

Program Director

1. Prepare the scope of work statement and/or specifications of materials/services to be solicited.

Contracts Officer

2. Establish the solicitation timeframe which includes:
 - a. Date and time period for advertisement.
 - b. Closing date for receipt of bids/proposals.
 - c. Opening date of bids/proposals.

Program Director

3. Establish minimum requirements.
4. Establish evaluation criteria, if applicable.

Contracts Officer

5. Prepare the bid package which includes:
 - a. Cover sheet (closing and opening date)
 - b. Statement of work specifications or materials to be purchased.
 - c. Minimum requirements
 - d. Evaluation criteria
 - e. Work quality standards
 - f. Proposal format
 - g. Sample contract
 - h. Date of bidder's conference
 - i. Right of the agency to accept or reject all bids
 - j. Period of contract

ADDITIONAL INFORMATION:

1. Minimum requirements must include:
 - a. Certification regarding debarment and suspension.
 - b. Lobbying
 - c. Drug Free Workplace
2. Affirmative Action Steps must include:
 - a. Giving preference to each of the following:
 - Minority Firms
 - Women Business Enterprises
 - Labor Surplus Area Firms
 - Small Business (defined as any business whose gross are \$2,000,000 or less per year)
3. Agency shall make awards only to responsible contractors possessing the ability to perform successfully under the terms and conditions of proper procurement. Consideration must be given to such matters as contractor integrity, compliance with public policy, record of past performance and financial and technical resources.
4. Minimum requirements cannot be unreasonable or excessive.

FORMS:

1. Certification regarding debarment and suspension.
2. Certification regarding lobbying.
3. Drug Free Workplace Certification.

CONTRACTOR

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, Participants' responsibilities. The regulations were published as Part VII of the May 26, 1988 Federal Register (pages 19160-19211).

(BEFORE SIGNING CERTIFICATION, READ ATTACHED INSTRUCTION)

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 or 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 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

INSTRUCTIONS FOR CERTIFICATION

1. By signing and submitting this proposal, the prospective contractor is providing the certification set out below.
2. The inability of a person to provide the certification required below will not necessarily result in denial of participation in this covered transaction. The prospective participant shall submit an explanation of why it cannot provide the certification set out below. The certification or explanation will be considered in connection with the Department of Labor's (DOL) determination whether to enter into this transaction. However, failure of the prospective primary participant to furnish a certification or an explanation shall disqualify such person from participation in this transaction.
3. The certification in this clause is a material representation of fact upon which reliance was placed when the DOL determined to enter into this transaction. If it is later determined that the prospective primary participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the DOL may terminate this transaction for cause or default.
4. The prospective primary participant shall provide immediate written notice to the DOL if at any time the prospective primary participant learns its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
5. The terms "covered transaction"; "debarred", "suspended", "ineligible", "lower tier covered transaction", "participant", "person", "primary covered transaction", "principal", "proposal", and "voluntarily excluded", as used in this clause, have the meanings set out in the Definitions and Coverage sections of the rules implementing Executive Order 12549. You may contact the DOL for assistance in obtaining a copy of those regulations.
6. The prospective primary participant agrees by submitting this proposal that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the DOL.
7. The prospective primary participant further agrees by submitting this proposal that it will include the clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion--Lower Tier Covered Transactions", provided by the DOL, without modification, in all lower tier covered transactions and all solicitations for lower tier covered transactions.
8. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended,

ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determined the eligibility of its principals. Each participant may, but is not required to, check the List of Parties Excluded From Procurement or Nonprocurement Programs.

9. Nothing contained in the foregoing shall be construed to required establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
10. Except for transactions authorized under paragraph 6 of these instructions, if a participant in a covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the agency may terminate this transaction for cause or default.

D. SOLICITATION OF BIDS/PROPOSALS

PURPOSE: To establish a standard method of advertising procurement activities to assure maximum open and free competition.

PROCEDURES:

Program Director

1. Prepare the advertisement for newspaper.
2. Prepare notice to be posted.
3. Submit to Contracts.

Contracts Officer

4. Submit advertisement to newspaper and post advertisement.
5. Secure documentation of advertisement, i.e. newspaper - tear sheet, posting signed statement from the office where it was posted.
6. Notify all individuals on the bidders list of solicitation, if applicable.

Secretary

7. Record the name of the individuals or firms requesting bid packages, the date the request was received, and the date the bid package was sent.

Program Director

8. Prepare technical information for bidders conference.
9. Facilitate bidder's conference.

Secretary

10. Provide sign-in sheet for bidder's conference and ensure all individuals sign.
11. Record minutes of bidder's conference.

ADDITIONAL INFORMATION:

1. No verbal information about the solicitation will be provided to anyone.
2. Pre-qualified bidders list is the names and addresses of firms/individuals who have submitted all information necessary to certify that they meet requirements to be responsible bidder. All firms/individuals on the list will be sent bid packages automatically.

E. RECEIPT OF BIDS/PROPOSALS

PURPOSE: To establish procedures that will be followed to assure equal treatment to all perspective bidders.

PROCEDURES:

Reception/Secretary

1. All sealed bids/proposals will be logged into the bid/proposal control sheet.
2. Each bid will be stamped, dated, time of bid received, initiated by person receiving bid.

Administration

3. Bids/proposals will be maintained in a secured location until time of opening.
4. Return all bids received/submitted after closing date, unopened to bidder including letter of explanation as to the reason it was returned.

F. EVALUATION OF BIDS/PROPOSALS AND CONTRACT AWARDS

PURPOSE: To evaluate the bids/proposals submitted, select the contractor and award the contract.

PROCEDURES:

Administration

1. Conduct bid opening (public or private).
2. For public bid openings (IFB's) the bid amounts will be announced at the opening.

Contract Officer

3. Schedule meeting of evaluation panel.

Evaluation Panel

4. Evaluate bids/proposals for compliance with all requirements.
5. Evaluate the responsive bids/proposals based on cost of criteria established in the bid package.
6. Prepare summary of points/costs for all of the responsive bidders.
7. Submit the name, the bid amount and justification for selection of the individual/firm selected for contract award to administration for approval.

Contracts Officer

8. Send the notice to contract to select contractor and secure the following information.
 - a. Certification of insurance, if applicable.
 - b. Review and approve suppliers list, if applicable.
 - c. Secure a copy of all required licenses, if applicable.
 - d. Certification regarding suspension and debarment from suppliers and subcontractors.
9. Verify that the insurance meets requirements, if applicable.
10. Secure fully executed contract.
11. Provide written notification to unsuccessful bidders.
12. Schedule debriefing conference for bidders based on individuals requests.

ADDITIONAL INFORMATION:

1. The Personnel Policies provide standards of conduct for employees/officers or agents to avoid conflict of interest.
2. Responsive bidder is a bidder who meets all requirements identified in the bid package.
3. The contract is not awarded at the time of the public bid opening.
4. A sample format for a debriefing conference is as follows (debriefing is only held at the request of the bidder):
 - a. Schedule date and time of debriefing conferences with unsuccessful contractor.
 - b. Inform unsuccessful contractor of the following:
 - Points for each criterion of unsuccessful contractors bid.
 - Dollar amount of successful contractor.

G. PROTEST PROCEDURES

PURPOSE: To provide specific actions which will be taken should a protest be filed by an unsuccessful bidder.

PROCEDURES:

Protester

1. File a written complaint using the agency specified format within ten (10) working days after notice of rejection.

Contracts Officer

2. Notify contractor that a complaint of protest has been filed.

Administration

3. Schedule the meeting of protest committee to review complaint.

Protest Committee

4. Conduct meeting to evaluate protest within ten (10) working days of the filing of the receipt of protest.
 - a. Record minutes of evaluation of protest committee meeting.
5. Issue a decision to agency administration within five (5) working days of the meeting of the protest committee.
6. Notify protester of the decision of the protest committee.

ADDITIONAL INFORMATION:

1. Protest format will contain the following:
 - Notice of protest and specific reasons for filing the protest.
 - Statement stating this is a protest letter.
 - A detailed statement of the grounds for protest.
 - A specific request for a ruling by the protest committee and a statement of the relief requested.

*If this information is not furnished, the agency may refuse to consider the protest.

2. Protests must always be provided in writing.
3. The individuals who sit on the protest committee must be identified in writing prior to commencement of all procurement activities.
4. The contracting officer and program director should not be involved in the protest procedures other than to provide technical support to the protest committee.

H. RECORDS MANAGEMENT

PURPOSE: To detail the required information that must be maintained in the bid process, contract, and protest (if applicable) to ensure proper documentation.

PROCEDURES:

Contracts Officer

1. Establish and maintain the bid file(s) which includes:
 - a. Cost estimated and approval to proceed with the procurement.
 - b. Documentation of advertisement.
 - c. Bid/proposal package.
 - d. List of individuals attending the bidders conference (sign-in sheet).
 - e. Minutes of the bidders conference.
 - f. List of evaluation panel members.
 - g. Bids received.
 - h. Summary sheet and work papers.
 - i. Rejection letters.
2. Establish and maintain contractor files which include the following information:
 - a. Bid/Proposal
 - b. Notice to Contract
 - c. Certificate of Insurance
 - d. Licenses, if applicable
 - e. Payment Requests
 - f. Performance Evaluations
 - g. Change Order, if applicable
 - h. Contract
 - i. Certifications
 - Suspension and Debarment
 - Lobbying
 - Drug Free Workplace

Administration

3. Protest File
 - a. List of protest committee members.
 - b. Copy of the protest committee correspondence, meeting minutes, and work papers.