



Spectrum Community Services

LIHEAP Contract

Prepared November 6, 2009

REQUEST FOR PROPOSAL
FOR HVAC and WATER HEATER INSTALLERS

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INTRODUCTION AND BACKGROUND

PURPOSE OF THE REQUEST FOR PROPOSAL FOR HVAC CONTRACTORS

Spectrum Community Services is interested in finding HVAC subcontractors to do work in the following areas:

- Assess, repair and replace hot water heaters, furnaces, and equipment related to these items.
- Contractor to provide parts and supplies for the repair and replacement of hot water heaters, furnaces, and equipment related to these items.
- Once contractor is selected SCS will provide further information about the contracts, or you can go to the website: <http://www.csd.ca.gov/Contractors/documents/Energy%20tab/LIHEAP/2009%20LIHEAP/4%20-%20Contract/2009%20LIHEAP%20Contract%20w%20Cover%20Ltr%20and%20Footnotes.pdf>

LIHEAP is a federally-funded program which helps low-income households pay their energy bills as well as weatherize their home for energy savings. Eligibility is based on the household's total monthly income. DOE WAP is a Department of Energy Weatherization Assistance Program. Both of these programs have rigorous reporting requirements as well as caps on allowable costs for work provided.

ADMINISTRATIVE

POINT OF CONTACT

Any questions concerning technical specifications or Statement of Work (SOW) requirements must be directed to:

Name	Christin Thomas
Address	1435 Grove Way Hayward, CA 94564
Phone	(510)-881-0300 ex: 230
FAX	(510)-537-3340
Email	cthomas@spectrumcs.org

DUE DATES

All proposals are due by 4pm on November 6th 2009. Any proposal received at the designated location after the required time and date specified for receipt shall be considered late and non-responsive. Any late proposals will not be evaluated for award.

SCHEDULE OF EVENTS

Event	Date
1. RFP Distribution to Contractors	October 23 rd 2009
2. Questions from Contractors about scope or approach due	November 2 nd 2009
3. Responses to Contractors about scope or approach due	November 4 th 2009
4. Proposal Due Date	November 6 th 2009
5. Target Date for Review of Proposals	November 13 th 2009
6. Final Contractor Selection Discussion(s)--Week of	November 16 th 2009
7. Anticipated decision and selection of Contractor(s)	November 20 th 2009
8. Anticipated commencement date of work	November 23 rd 2009

GUIDELINES FOR PROPOSAL PREPARATION

PROPOSAL SUBMISSION

Award of the contract(s) resulting from this RFP will be based upon the most responsive bidder(s) whose offer(s) will be the most advantageous to Spectrum in terms of cost, functionality, technical quality, and other factors as specified elsewhere in this RFP.

Spectrum reserves the right to:

- Reject any or all offers and discontinue this RFP process without obligation or liability to any potential Contractor
- Accept other than the lowest priced offer
- Award a contract on the basis of initial bids received, without discussions or requests for best and final offers
- Award more than one contract

Bidders shall submit bid packages containing several parts as set forth below. Bidders will confine submission to those matters sufficient to respond to this RFP and to provide adequate basis for Spectrum to evaluate a bidder's qualifications.

Successful bidder's submission in response to this RFP will be incorporated into the final agreement between Spectrum Community Services and the selected bidder(s). Complete submissions must contain the following:

Title Page: Show the submittal subject, name of firm, local address, telephone number, contact person and date.

Letter of Transmittal: Provide a brief letter summarizing qualifications.

Company Profile: Provide an overview of the company including location, number of staff, and describe the services, materials and products the firm provides.

Project Team: Identify the project team members (management, support staff, field workers, etc.) that will be assigned to the project and their qualifications, certifications and licenses, training and expertise.

Relevant Experience/Qualifications: Provide information regarding the company's relevant experience related to the services requested.

Workload Capacity: Indicate the company's workload and capacity to perform the work on a realistic schedule.

Pricing: Indicate the firm's pricing, caps and other requirements for each requested service, material and/or product that the bidder is responding to.

Payroll Capacity: Provide evidence of payroll as required in this RFP, and listings of worker wages and benefits.

Reporting Capacity: Indicate the company's capacity to provide required documentation and reports as described in this RFP.

Documentation: Provide evidence (copies of originals) of all required insurance, bonding, licenses and certifications as indicated in this RFP.

Client Listing: Please provide a references and work examples in your proposal.

Credit Check: Provide information and signatures allowing a credit check to ensure purchasing capacity.

The detailed requirements for each of the above-mentioned sections are outlined in this RFP. Bid packages should consist of single copies of each required document (no duplicates necessary). Bids submitted that lack any of the required information or documentation may be deemed incomplete and may not be considered for selection, at Spectrum's discretion.

Submissions must be received no later than 4:00 p.m. on Friday November 6th 2009 at the offices of Spectrum Community Services in Hayward California. Submissions should be addressed to:

RFP Selection Committee
Spectrum Community Services
1435 Grove Way
Hayward, CA 94546

DETAILED RESPONSE REQUIREMENTS

EXECUTIVE SUMMARY

This Request for Proposal is intended to produce multiple contracts with quality contractors to do work installing and repairing furnaces and hot water heaters. These contracts will allow SCS to complete the volume of work that they have been contracted to do by the State and Federal governments. We will send work orders to qualifying contractors on a regular basis.

SCOPE FOR HVAC CONTRACTORS

Outlined below is the scope of work that Spectrum Community Services requires from the Contractor:

- Contractor provides assessment and estimate of work to be completed on SCS work orders.
- The contractor shall pull and pay for all necessary city or county permits as well as schedule inspections.
- The contractor shall schedule and coordinate with clients, in a timely fashion, work to be done, prioritizing health and safety work.
- Contractor must comply with State and Federal cost limitations and mandatory measures as outlined in the LIHEAP or DOE contract. Spectrum will provide contractor with State and Federal guidelines.
- If any work is estimated to surpass cost limitations, contractor must inform SCS for approval by the State.
- All parts components, or devices for the client's HVAC systems that are not in proper operational condition, shall be repaired, and or replaced with new parts, components, or devices of the same manufacturer or SCS approved equal to bring systems up to **current mechanical codes**.
- Contractor shall assure, pursuant to Public Law 103-333, Section 507, to the extent practicable, that all equipment and products purchased with funds made available under this RFP shall be American made.
- Job Site Safety: The Contractor shall adhere to the Occupational Safety and Health Administration's (OSHA's) most recently published Safety and Health Regulations for Construction (29 CFR 1926) and general Occupational Safety and Health Standards (29 CFR 1910) for the duration of this contract.
- The Contractor shall perform all work and orders with due diligence and in good and workmanlike manner and shall complete the work and orders in accordance with industry standards.
- For problems or deficiencies of significant importance or of a continual nature, the contractor will be given two weeks to correct such problems provided in writing by SCS, for regular service calls. If the problem is a Health and Safety issue, contractor must respond within 48 hours.
- Contractor must allow for inspection of work completed by a Spectrum Community Services inspector before payment will be released to contractor.
- Contractor is responsible for coordinating inspection of completed work by city or county inspector or HERS rater when necessary.

DELIVERABLES

Company Profile

Provide the following for your company:

- Official registered name (Contractor's Board, D.B.A., Partnership, etc.), Dun & Bradstreet Number, Primary and secondary SIC numbers, address, main telephone number, toll-free numbers, and facsimile numbers.
- Key contact name, title, address (if different from above address), direct telephone and fax numbers.
- Person authorized to contractually bind the organization for any proposal against this RFP.
- Brief history, including year established and number of years your company has been installing HVAC systems.

Project Team

Include biographies and relevant experience of key staff and management personnel. Describe the qualifications and relevant experience of the types of staff that would be assigned to this project by providing biographies for those staff members. Describe bonding process and coverage levels of employees as well as licencing each employee holds. Affirm that no employees working on the engagement have ever been convicted of a felony.

Relevant Experience/Qualifications

See Client List requirements.

Workload Capacity

Indicate the company's workload and capacity to perform the work on a reasonable schedule.

Pricing

- Provide an accurate price list for all job types, ex: hot water heater replacement, furnace replacement, furnace flue replacement, duct replacement, etc... (see attached list)
- Contractor to provide documentation of cost for replacement parts, components, or devices. Contractor to provide with cost plus (+) mark up on bid sheet.

Payroll Capacity

There are no specific payroll requirements for this RFP.

Reporting Capacity

The contractor will be required to keep **legible** and detailed documentation on all work performed under this contract. **Detailed** documentation includes but is not limited to the following items:

- date of service
- time in and time out
- address serviced
- specific area and equipment being serviced (location of equipment, **make and model, serial number of existing equipment and new equipment**)
- detailed diagnosis of the problem/repair
- services performed
- number of service hours
- hourly rate for services performed
- material(s) used
- cost of material(s)/equipment
- name of the technician
- notice that warranty of any new material/equipment installed was given to resident
- signed off permit

All documentation must be included with the invoice.

Documentation

- Evidence (copies of originals) of proper insurance coverage is required for any contract involving any activities that put Spectrum or Spectrum's contracting agencies at risk. In addition to providing evidence of appropriate insurance coverage, all contractors must confirm in writing that they will maintain those required insurance coverages and levels over the course of the contract with Spectrum, and that failure to do so is a breach of contract. Spectrum Community Services must be added to the insurance policy for the amount of \$.
- Contractors shall submit copies of all Contractor licenses applicable to work to be completed and current standing with the State Contracting Board. Required licenses are class C-20 and C-36.

Client Listing

Provide three current references for which you have performed similar work including contact information.

AWARD CRITERIA

Any award made pursuant to this RFP will be based upon the proposal with proper consideration given to operational, technical, cost, and management requirements. Evaluation of offers will be based upon the Contractor's responsiveness to the RFP and the total price quoted for items covered by the RFP. The following elements will be the primary factors in evaluating all proposals and in the selection of a Contractor or Contractors:

- Overall cost of Contractor's proposal.
- Quality or technical competency of product or service. The Contractor's stability, experiences, and record of past performance in delivering such services.
- Capacity to provide required documentation and reports
- Worker certifications, training/continuing education programs Cost or price analysis of service(s). Availability of sufficient high quality Contractor personnel with the required skills and experience for the specific approach proposed.
- Insurance coverage and/or bonding as required in RFQ or RFP
- Business licenses and/or certifications, including contractors' licenses.
- Natural resource conservation, ability to provide American made products.

SCS may, at their discretion and without explanation to the prospective Contractors, at any time choose to discontinue this RFP without obligation to such prospective Contractors.