



## **REQUEST FOR PROPOSAL (RFP)**

for  
Weatherization Services

### **PROPOSAL DEADLINE**

**Monday, November 13<sup>th</sup>, 2023**

**5:00 P.M.**

CSET Administrative Office

312 N. W. 3rd Avenue

Visalia, CA 93291

### **Subcontract for Weatherization Services**

- Heating and Cooling Repair/Replacement
  - Water Heater Repair/ Replacement
  - Electrical Inspection Repair/ Replacement
- Gas/Electric Range and Kitchen Repair/Replacement
- Insulation Replacement- Knee wall, Floor, Wall, Ceiling insulation

## REQUEST FOR PROPOSAL FOR WEATHRIZATION SERVICES

Requested by: Community Services Employment Training

Issuance Date: Monday, October 23<sup>rd</sup>, 2023

Bidders Conference: Monday, October 30<sup>th</sup> at 10:00 A.M. – 12:00 P.M.  
*Community Services Employment Training*  
*939 E. Douglas*  
*Visalia, CA 93292*

Proposal Due: Monday, November 13, 2023 by 5:00 P.M.  
Sealed proposal package(s) can be delivered to:

***Attn.: Nora Carrillo, Director of Energy Services***  
***312 N.W. 3<sup>rd</sup> Ave***  
***Visalia, CA 93291***

***Note: faxed or email proposals will NOT be accepted***

Proposal Evaluation: Monday, November 20<sup>th</sup>, 2023

Announcement of Award: Wednesday, November 23<sup>rd</sup>, 2023

Estimated homes: CSET anticipates weatherizing 250 homes

Any questions please contact: Nora Carrillo at [nora.carrillo@cset.org](mailto:nora.carrillo@cset.org)

Introduction: Since 1979, CSET has been the Community Action Agency of Tulare County, implementing various programs benefiting the community. It operates a comprehensive Weatherization Program through its Energy Services Department. The program is contracted with the State of California Department of Community Services and Development (CSD) and with federal resources. The programs aim is to reduce energy costs for low-income households of Tulare County by providing no-cost/no out of pocket installation of measures to make their home more energy efficient, comfortable and safer place to live.

***Note: This RFP does not commit CSET to award a contract. CSET reserves the right to accept or reject any or all proposals received. All solicitations are contingent upon execution of contracts and availability of funds. In addition, CSET reserves the right to reject any or all proposals when they are not responsive to the specifications of this RFP. Competitive negotiation requires that at least two responsive proposals for the same scope of work and service area must be received in response to the RFP. A competition is considered failed if only one responsive proposal is received. If a competition has been declared failed, CSET then has the option to re-compete the procurement or enter into procurement by non-competitive negotiation (sole source procurement).***

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### RFP Scoring Guidelines:

It is required for the selected subcontractor to have the capacity to perform assigned weatherization services including providing the following:

- Current General Contractor’s license and specialty licenses issued by the State of California
- Contractors State License Board
- Experience providing weatherization services to low-income clients
- Ability to complete meet CSET estimated home goal
- Ability and trained crews to comply with guidelines provided under the California Department of Community Services and Development (CSD) Weatherization Installation Standard (WIS) Manual. A copy of the WIS Manual will be provided to subcontractors awarded for services
- Adequate vehicles and equipment to complete work according to CSD guidelines

Proposals will be evaluated on each line item below (RFP Score Sheet) the subcontractors with the

<b>RFP SCORE SHEET</b>		
	Maximum Points	Score
<b>Introduction</b>		
<i>Thoroughness of Proposal</i>	15	
<b>Knowledge and Experience</b>		
<i>Years in business providing low-income weatherization services</i>	15	
<i>Annual production levels achieved</i>	5	
<i>Experience installing weatherization measures in a timely manner</i>	15	
<b>Capacity to perform weatherization services</b>		
<i>Number of staff working for you to perform the services timely</i>	5	
<i>Estimated timeframe to complete a weatherization measures</i>	20	
<b>Cost Proposal</b>		
<i>Prices Charged</i>	25	
<b>Total Score</b>	100	

highest overall score will be selected for the award of services.

# REQUEST FOR PROPOSAL FOR WEATHRIZATION SERVICES

## **I. Purpose of this Request For Proposal**

The purpose of this proposal is to contract for all labor, equipment and materials required to complete the below listed work in accordance with the initial dwelling assessment conducted by CSET, as documented in the Subcontractor Work Order and Contract Guidelines and the Weatherization Installation Standards manual (WIS).

CSET is currently seeking bids from qualified Contractors that may be interested in serving as a subcontractor for any and/or all of the following scopes of work:

- Heating and Cooling Repair/Replacement
- Water Heater Repair/ Replacement
- Insulation and Attic Venting
- Gas/Electric Range and Kitchen Repair/Replacement
- Electrical Inspection Repair/ Replacement

## **II. Scope of Services Required**

The sub-contractor should be able to provide the above listed services as the need arises, including occasional emergency request. The service area is located within the boundaries of Tulare County. Weatherization measures installed shall comply with county or city codes (if applicable). A building permit shall be obtained before the start of a job and immediately submitted to CSET (if applicable). The sub-contractor must provide all materials, labor, tools, equipment, and supervision required to complete the proposed work. In addition, the subcontractor shall select and use the most cost effective measures and assure to the extent practicable, that all appliances and material purchased with funds made available under this contract shall be American Made.

## **III. Contract Terms**

CSET's Weatherization Program is funded by the State of California Office of Community Services and Development. The term of the contract shall be from October 01, 2019 through November 30, 2020. At the option of CSET the contract can be extended and renewed for an additional 1 year period and/or up to 4 years contingent upon funding and provided that all terms and conditions remain unchanged and in full force and effect. This option, if exercised, required the mutual agreement of BOTH parties. The agreement is for weatherization services, under but not limited to the following programs; LIHEAP, LIWP, DOE and DAP and other weatherization programs.

## **IV. PAYMENT GUIDELINES:**

Standard pricing SHALL INCLUDE:

All labor, materials, equipment and any other costs associated with the replacement and/or repair per the Weatherization Installation Standards manual (WIS), excluding permit fees, CAS tests, duct tests, and HERS rater costs, which should be reflected under a separate line item on the invoice.

Standard pricing SHALL NOT INCLUDE:

Any electrical work, smoke alarms, CO alarms, house gas lines, carpentry work, sheet rock, extra equipment accessories (such as blower kits, rear discharge kits, blades, hand tools, etc.) or any additional work items to facilitate a repair or replacement.

Invoicing for Items not included in Standard Pricing:

Any item needed to complete your scope of work under this RFP which is not to be included in your standard pricing shall be invoiced on a line item basis separate from all standard item billing.

## REQUEST FOR PROPOSAL FOR WEATHRIZATION SERVICES

Jobs will NOT be considered complete until all supporting documentation is sent to and obtained by CSET for EACH invoice packet submitted.

A Complete Invoice Packet Shall Include the Following:

- An itemized invoice as follows:
- Description of the work performed including type of repair or replacement
- Labor hours
- Itemized list of materials used
- Permit fees, if applicable
- Sales tax – if applicable
- Serial number of replacement unit(s) installed
- Copy of work order signed by the client verifying work has been completed
- Permit receipt – if applicable
- A high quality legible copy of the final permit, do not send the original as it stays with the client, do include all building official endorsements confirming all work has been completed to the satisfaction of the local jurisdiction having authority;
- Duct test documentation completed and signed by the CSD certified technician completing the work;
- Completed HERS documentation and approved by a certified HERS technician;
- Completed Combustion Appliance Safety (CAS) test documentation completed by a certified technician who completed the work.

Failure to submit a COMPLETE invoice packet to CSET shall result in the denial or delay of payment processing until a complete invoice package is received. Aging of invoice(s) does not begin until all information is received by CSET. Payment will be made within sixty days of receipt of a complete invoice packet for services rendered.

### **V. CSD TRAINING – REQUIRED**

The successful bidder shall be required, upon execution of the subcontract agreement for this scope of work, to attend a CSD approved course for Combustion Appliance Safety Testing at Subcontractor's expense. Any employee who will be involved in this work for the Subcontractor must attend this training.

### **VI. WARRANTY**

The successful bidder shall be required to warranty their work for a period of not less than one (1) year from the date of CSET's final inspection at no cost to CSET or the client. Clients are required to contact CSET directly for warranty work requests. Upon receipt of any such requests CSET will determine if the work is warranty and provide the successful bidder's company with a Warranty Work Order.

## REQUEST FOR PROPOSAL FOR WEATHRIZATION SERVICES

### **VII. INSURANCE**

The Contractor shall procure, maintain, and keep in force at all times during the term of the Contract, at the Contractor's sole expense, the following insurance:

#### Insurance and Fidelity Bond

##### **A. General Requirements**

1. Subcontractor agrees that the required insurance policies and bonds, specified below, shall be in effect at all times during the term of this Agreement.
2. Subcontractor shall provide CSET with written notice at least 30 calendar days prior to cancellation or reduction of insurance coverage to an amount less than that required in this Agreement and, prior to any lapse or reduction in coverage, provide CSET with documentation, as specified in subparagraph 3, showing substitute coverage has been obtained or alternative measures have been taken to ensure compliance with the requirements of this Agreement.
3. In the event said insurance coverage expires during the term of this Agreement, Subcontractor agrees to provide, prior to said expiration date, a new Certificate of Insurance (ACORD 25) evidencing insurance coverage as provided herein for not less than the remainder of the term of this Agreement. The Certificate of Insurance (ACORD 25) shall identify and name CSD as the Certificate Holder.
4. New Certificates of Insurance are subject to review for content and form by CSET.
5. In the event Subcontractor fails to keep in effect at all times the specified insurance and bond coverage as herein provided, CSET may, in addition to any other remedies it may have, suspend this Agreement.
6. With the exception of workers' compensation and fidelity bond, CSET shall be named as additional insured on all certificates of insurance required under this Agreement.
7. The issuance of other CSET contracts, as well as reimbursement payments, to the Subcontractor may be suspended until evidence of the required current insurance coverage has been submitted to CSET.
8. Should the subcontractor utilize a subcontractor(s) to provide services under this Agreement, Contractor shall indemnify and hold CSET harmless against any liability incurred by that subcontractor(s).

##### **B. Self-Insurance**

1. When Subcontractor is a self-insured governmental entity, CSET, upon receipt of satisfactory proof of the entity's self-insurance authority, may waive the insurance requirements. A duly authorized county or city risk manager shall provide signed certification of the governmental entity's ability to cover any potential losses under this Agreement.
2. Governmental contractors shall specify in writing a list of which coverage(s) will be self-insured under this Agreement and shall list all applicable policy numbers, expiration dates, and coverage amounts for coverage which is not self-insured.
3. If a governmental contractor's self-insurance coverage does not contain any changes from the prior year, CSET will accept a certified letter signed by authorized personnel, stating that no changes have occurred from the previous year. This letter is due at the time of contract execution or within 30 days of coverage.

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### **C. Workers' Compensation Insurance**

1. During the term of this Agreement subcontractor shall maintain legally sufficient workers' compensation insurance issued by an insurance carrier licensed to underwrite workers' compensation insurance in the State of California.
2. Worker's Compensation insurance, with coverage as required by the State of California (unless Contractor is a qualified self-insurer with the State of California), and Employer's Liability coverage. The limits of Employers' Liability shall not be less than:
  - Each Accident- One Million Dollars (\$1,000,000)
  - Disease Each Employee- One Million Dollars (\$1,000,000)
  - Disease Policy Limit- One Million Dollars (\$1,000,000)

The Worker's Compensation policy required hereunder shall be endorsed to the State that the Workers' Compensation carrier waives its right of subrogation against CSET, its officers, directors, officials, agents, employees, participants and volunteers. In the event the Contractor is self-insured, the Contractor shall furnish a Certificate of Permission to Self-Insure by the Department of Industrial Relations Administration of Self-Insurance, Sacramento, California.

### **D. Commercial or Government Crime Coverage (Fidelity Bond)**

1. Subcontractor shall maintain commercial crime coverage. If Subcontractor is a public entity that elects to self-insure, Subcontractor shall make provision for adequate coverage to insure against crime risks. The commercial crime policy or government crime self-insurance coverage (hereinafter "fidelity bond") shall include the following coverage or the substantial equivalent: Employee Dishonesty/Theft, Forgery or Alteration, and Computer Fraud.
2. Subcontractor's fidelity bond coverage limits shall not be less than a minimum amount of 4% of the total contract amount, excluding Utility Services of Direct Services, as set forth under this agreement.
3. Subcontractor will not be paid an advance or any reimbursement of expenses unless it has first submitted to CSET an applicable Certificate of Insurance (ACORD 25) as evidence of compliance with the fidelity bond requirement.

### **E. General Liability Insurance**

General Liability insurance including, but not limited to, protection for claims of bodily injury and property damage liability, personal and advertising injury liability, contractual and products and complete operations liability. Coverage shall be at least as broad as "Insurance Services Office Commercial General Liability Coverage Form CG 0001" (occurrence). The limits of liability shall not be less than:

- Each Occurrence- One Million Dollars (\$1,000,000)
- Personal & Advertising Injury- One Million Dollars (\$1,000,000)
- Product & Complete Operations- Two Million Dollars (\$2,000,000)
- Aggregate – General Aggregate- Two Million dollars (\$2,000,000)
- Fire Damage- One Hundred Thousand Dollars (\$100,000)

The products and Completed Operations coverage shall be maintained for at least one (1) year after completion of the Contract.

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### ***F. Vehicle Insurance***

Vehicle insurance providing protection against claims of bodily injury and property damage arising out of the ownership, operation, maintenance or use of owned, hired, and non-owned automobiles. Coverage shall be at least as broad as "Insurance Services Office Business Auto Coverage Form CA0001", symbol 1 (any auto). Use of symbols other than symbol 1 for liability for corporate/business owned vehicles must be declared to and approved by CSET. If there are no owned or leased vehicles, symbols 8 or 9 for non-owned and hired autos shall apply. Personal automobile insurance shall apply if vehicles are individually owned.

The limits shall not be less than:

Corporate/business owned or commercially insured vehicles, including non-owned and hired, \$1,000,000 Combined Single Limit. Individually owned vehicles, \$500,000 Combined Single Limit or, if split limits are used, \$250,000 per person, \$500,000 each accident, \$100,000 property damage.

### ***G. Contractor's Equipment.***

The Contractor, and each of its Subcontractors, shall separately insure their own equipment for loss and damage. The Contractor's property policies shall include, or be endorsed to include, a waiver of subrogation against CSET, its officers, directors, agents, employee, participants, and volunteers which might arise by reason of damage to the Contractor's property or equipment (owned, leased, hired or borrowed) in connection with work performed under their Contract.



## REQUEST FOR PROPOSAL FOR WEATHRIZATION SERVICES

### **TO BE SUBMITTED WITH PROPOSAL**

All proposals must include and will be evaluated on the following items. Please package your RFP in the following order:

1. A cover letter identifying:
  - a. The company's specific areas of expertise,
  - b. The company principals/ owners,
  - c. The number of years of related experience,
  - d. Subcontractor's ability to complete the assigned work, e. Subcontractors ability to comply with CSET and CSD contractual requirements
  - f. Willingness to be available on an as needed basis
2. Comprehensive narrative outlining:
  - a. Professional qualifications
  - b. Work experience
  - c. Subcontractor's project approach to complete the Scope of Services and project timeline including but not limited to estimate on turnaround time for assigned work orders, customer service, and responsiveness to inquiries from CSET and availability to start work
  - d. Proposed monthly reporting to CSET of status of assigned work-in-progress
3. Organization chart listing the company employees and titles that would be assigned to the program along with a listing of employees and their approved trainings completed
4. Complete bid form for each weatherization services your company would like to bid for
5. Copies of licensing and certificates
6. Copies of most current insurance certificates

REQUEST FOR PROPOSAL FOR WEATHRIZATION SERVICES

## Heating and Cooling Repair/ Replacement Bid Form

Subcontractor Information	
Company Name:	
Printed Name of Bidder's Authorized Officer/ Representative: Title:	
Signature of Authorized Officer/ Representative:	Date:
Business Address:	
Telephone Number:	Fax Number:
Email Address:	
Bid Pricing	
Please provide your pricing for the following Bid Items, price shall include all labor, materials, equipment, and permits to accomplish the requested work documented in the Subcontractor Work Order. *(Assessment fee: evaluation of installation work to determine a repair/replace, with all expected costs at or under contracted price)	
Bid Item	Lump Sum
*Appliance Assessment Fee - (included with installation fees)	\$
Hourly Labor Rate	\$
Permit Fees (actual cost)	\$
<b>HEATING REPLACEMENTS:</b>	
Exterior Wall Direct Vent	\$
Interior Wall Furnace	\$
Floor Furnace	\$
Forced Air Unit (Split System - Furnace)	\$
Package Unit (Dual Package)	\$
Heat Pump	\$
Wood-Fueled	\$
OTHER:	\$
<b>HEATING REPAIRS:</b>	
Exterior Wall Direct Vent	\$
Interior Wall Furnace	\$
Floor Furnace	\$
Forced Air Unit (Split System - Furnace)	\$



REQUEST FOR PROPOSAL FOR WEATHORIZATION SERVICES

**Water Heater Repair/ Replacement**

**Bid Form**

**Subcontractor Information**

Company Name:		
Printed Name of Bidder's Authorized Officer/ Representative:	Title:	
Signature of Authorized Officer/ Representative:	Date:	
Business Address:		
Telephone Number:	Fax Number:	Email Address:

**Bid Pricing**

Please provide your pricing for the following Bid Items, price shall include all labor, materials, equipment, and permits to accomplish the requested work documented in the Subcontractor Work Order. \*(Assessment fee: evaluation of installation work to determine a repair/replace, with all expected costs at or under contracted price)

Bid Item	Lump Sum
*Appliance Assessment Fee - (included with installation fees)	\$
Hourly Labor Rate	\$
Permit Fees (actual cost)	\$
<b>WATER HEATER - REPLACEMENT</b>	
Water Heater – Natural Gas & Propane – All Types	\$
Water Heater – (Mobile Home) - Natural Gas & Propane	\$
Electric – (tankless)	\$
Heat Pump – 50 Gallons	\$
Heat Pump – 650 Gallons	\$
Heat Pump – 80 Gallons	\$
<b>WATER HEATER - REPAIRS</b>	
Water Heater – Natural Gas & Propane – All Types	\$
Water Heater – (Mobile Home) - Natural Gas & Propane	\$
Electric – (tankless)	\$
Heat Pump – 50 Gallons	\$
Heat Pump – 65 Gallons	\$
Heat Pump – 80 Gallons	\$







REQUEST FOR PROPOSAL FOR WEATHORIZATION SERVICES  
**Cooking Appliance and Kitchen Exhaust Repair and Replacement**  
**Bid Form**

**Subcontractor Information**

Company Name:	
Printed Name of Bidder's Authorized Officer/ Representative:	
Title:	
Signature of Authorized Officer/ Representative:	Date:
Business Address:	
Telephone Number:	Fax Number:
Email Address:	

**Bid Pricing**

Please provide your pricing for the following Bid Items, price shall include all labor, materials, equipment, and permits to accomplish the requested work documented in the Subcontractor Work Order. \*(Assessment fee: evaluation of installation work to determine a repair/replace, with all expected costs at or under contracted price)

<b>Bid Item</b>	<b>Lump Sum</b>
*Appliance Assessment Fee - (included with installation fees)	\$
Hourly Labor Rate – (included with installation fees)	\$
Permit Fee – (if applicable)	\$
<b>COOKING APPLIANCE – REPLACEMENT</b>	
Free Standing Range or Cook Top – (Natural Gas and Propane)	\$
Free Standing Range or Cook Top – (Electric)	\$
Built-In Single Wall Oven - Gas 24"	\$
Built-In Single Wall Oven - Electric 24"	\$
Built-In Single Wall Oven - Electric 30"	\$
Microwave Oven	\$
<b>COOKING APPLIANCE – REPAIRS</b>	
Free Standing Range or Cook Top – (Natural Gas and Propane)	\$
Free Standing Range or Cook Top – (Electric)	\$
Built-In Single Wall Oven - Gas 24"	\$
Built-In Single Wall Oven - Electric 24"	\$
Built-In Single Wall Oven - Electric 30"	\$
Microwave Oven	\$





REQUEST FOR PROPOSAL FOR WEATHORIZATION SERVICES

**Electrical Knob & Tube Inspection/Repairs**

**Bid Form**

Subcontractor Information	
Company Name:	
Printed Name of Bidder's Authorized Officer/ Representative:	
Title:	
Signature of Authorized Officer/ Representative:	Date:
Business Address:	
Telephone Number:	Fax Number:
Email Address:	
Bid Pricing	
Please provide your pricing for the following Bid Items, price shall include all labor, materials, equipment, and permits to accomplish the requested work documented in the Subcontractor Work Order.	
Bid Item	Lump Sum
Hourly Labor Rate – (included with installation fees)	\$
Knob & Tube Inspection (per dwelling)	\$
Minor Electrical Work (per dwelling)	\$

By my signature below I certify the above listed lump sum quotes include all costs for labor, materials, tools, equipment and applicable fees and taxes for the scopes of work described herein.

These price quotes shall remain valid for ninety (90) calendar days from the date below.

By: \_\_\_\_\_ / Date: \_\_\_\_\_  
Sign Name Print Date

\_\_\_\_\_/\_\_\_\_\_  
Print Name Print Title