



## **REQUEST FOR QUALIFICATIONS**

### **HVAC CONTRACTOR FOR RESIDENTIAL ENERGY PROGRAMS 2017**

The Mid-Ohio Regional Planning Commission (MORPC) requests interested and qualified companies to submit a Statement of Qualifications to become an approved Heating, Ventilation, and Air Conditioning (HVAC) Contractor for MORPC's Residential Energy Programs in Central Ohio.

MORPC is a voluntary association of local government communities in the 15 county Central Ohio area. Our organization strives to enhance the quality of life and competitive advantages of Central Ohio by working through local governments and other constituents. A catalyst for change, evidence of MORPC's work is seen every day through planning, programming and services in the areas of housing, transportation, water, land use, economic development, environment, public policy and technology. We assist our local government members by providing innovative solutions for the many challenges facing our growing region.

MORPC's Residential Energy Programs are publicly and privately funded and include Columbia Gas of Ohio's WarmChoice Program, the Home Weatherization Assistance Program (HWAP) administered by the Ohio Development Services Agency, American Electric Power's Community Assistance Program (AEP CAP), and the Electric Partnership Program (EPP).

This Request for Qualifications (RFQ) outlines the information necessary to understand the requirements for becoming an approved HVAC Contractor for MORPC's Residential Energy Programs and the required documentation in submitting a Statement of Qualifications. This Request for Qualifications is available online at [www.morpc.org](http://www.morpc.org) by following the links to "About MORPC" then "RFPs and RFQs."

## Contents

I.	BACKGROUND.....	3
II.	SCOPE OF SERVICES AND CONTRACTOR REQUIREMENTS .....	3
III.	CONTENTS OF THE STATEMENT OF QUALIFICATIONS.....	4
IV.	SELECTION PROCESS.....	5
V.	SCHEDULE.....	6
VI.	SUBMISSIONS.....	6
VII.	TERMS & CONDITIONS.....	6

## I. BACKGROUND

MORPC is a provider agency for several Residential Energy Programs that are funded by energy utilities and by Federal, State, and Local Governments. These programs are comprehensive residential energy efficiency and electric base load programs that target low-income residents in the City of Columbus and throughout Franklin County and provide no-cost home improvements to reduce energy consumption, improve health and safety, and to save money on utilities. Measures include insulation and air sealing, furnace repair/replacement, hot water tank repair/replacement, refrigerator/freezer replacement, and energy efficient lighting.

MORPC manages and delivers these programs with in-house staff and utilizes a network of qualified contractors to implement various aspects of the programs. MORPC conducts energy audits and creates work orders for energy efficiency, weatherization, and health and safety measures which are issued to contractors for implementation. Upon completion, MORPC conducts a quality control inspection to verify work and to determine energy savings. MORPC completes several hundred residential energy projects annually and provides a steady stream of work to our contractor network.

## II. SCOPE OF SERVICES AND CONTRACTOR REQUIREMENTS

HVAC Contractors perform weatherization measures including but not limited to: furnace repair and replacement; hot water heater repair and replacement; clothes dryer venting; duct installation and repair; ventilation fan installation; and addressing health and safety concerns. Contractors are paid for work performed in accordance to the fees listed on the work order provided by MORPC. The fees for all weatherization measures are set according to a pre-approved pricing schedule set by the program funders and will be included as part of the contractor agreement.

All work performed by HVAC Contractors shall be conducted in accordance with the Ohio Weatherization Program Standards ([http://development.ohio.gov/is/is\\_weath\\_standards.htm](http://development.ohio.gov/is/is_weath_standards.htm)), the policies and procedures of our program funders and all applicable local, state and federal codes. Beginning July 1, 2015 all work performed by HVAC Contractors shall be conducted in accordance with the Ohio Standard Work Specifications (SWS) and the Ohio Field Guide.

HVAC Contractors must complete the training and certification standards for Heat Technicians in the Ohio Home Weatherization Assistance Program ([http://www.coadinc.org/files/pdf/Ohio\\_HWAP\\_Requirements.pdf](http://www.coadinc.org/files/pdf/Ohio_HWAP_Requirements.pdf)).

Contractors must complete work within 28 days (4 weeks) of receipt of the work order issued by MORPC and deliver an invoice to MORPC within 7 days (1 week) of the date of work completion.

Contractors shall perform a criminal history check for each employee engaged in work for MORPC and our program funders.

Contractors shall purchase and maintain insurance with a carrier rated A- or better by A.M. Best with the following minimum limits of liability, with MORPC and Program Funders (as required) named as additional insured:

Commercial General Liability Insurance

\$1,000,000 Each Occurrence Limit (Bodily Injury and Property Damage)  
\$2,000,000 General Aggregate per Project  
\$2,000,000 Products & Completed Operations Aggregate  
\$1,000,000 Personal and Advertising Injury Limit

Business or Commercial Automobile Liability Insurance

\$1,000,000 combined single limit per accident

Workers' Compensation and Employers' Liability Insurance

\$100,000 Each Accident  
\$100,000 Each Employee for Injury by Disease  
\$500,000 Aggregate for Injury by Disease

Excess or Umbrella Liability (to overlay Employers' Liability, Automobile Liability and Commercial Liability Coverages)

\$1,000,000 occurrence/aggregate

Contractors shall maintain and provide for audit purposes all records related to work performed for a period of five years after work completion.

Contractors shall also have the proper systems and controls to account for all project funds and to safeguard the confidential information of clients.

### III. CONTENTS OF THE STATEMENT OF QUALIFICATIONS

The Statement of Qualifications must address the following items. Failure to respond to a specific requirement may be a basis for elimination from consideration. MORPC reserves the right to accept or reject any or all submissions.

A) Cover Letter

- List the name of the solicitation
- List the name, address, and other contact information of the company (may be part of letterhead)
- List the name, title, telephone number, and e-mail address of a contact person with authority to answer questions regarding the Statement of Qualifications
- Include an identification of the company as a corporation or other legal entity
- Include a statement that the contractor has sole and complete responsibility for delivery of the required services
- Be signed by a representative authorized to legally bind the firm

**B) Personnel and Corporate Profile**

- Overview of the company
- If applicable, statement on Minority Business Enterprise (MBE), Small Business Enterprise (SBE), Encouraging Diversity, Growth and Equity (EDGE) and Women-owned Business Enterprise (WBE) certifications
- Background information on individuals who are anticipated to be assigned to the work and must include the project manager
- Company criminal history check policy
- Describe systems and processes for the maintenance of records and accounts, including personnel and financial records, and controls to protect personal confidential information

**C) Related Experience**

- Three (3) recently completed residential jobs for references including the customer name, address, phone number, and a description of the work
- List of low-income programs and agencies for which company has previously or is currently providing contracting services including dates of service
- Demonstrate ability to complete work orders within the timeframe outlined in Section II

**D) Training and Certifications**

- Copy of current contractor license(s)
- For individuals who are anticipated to be assigned to the work, list of required trainings completed and/or plan for completing required trainings
- For individuals who are anticipated to be assigned to the work, list of required certifications held and/or plan for obtaining required certifications
- Other materials which demonstrate the company or individuals are qualified to perform the work

**E) Insurance**

- Copy of current Ohio Bureau of Workers' Compensation Certificate of Premium Payment
- Copy of Certificate of Liability Insurance meeting the limits of liability outlined in Section II, or a statement that the company will obtain insurance meeting the limits of liability outlined in Section II
- Statement that the company will furnish to MORPC a copy of the Certificate of Liability Insurance naming MORPC and Program Funders (as required) as additional insured

## **IV. SELECTION PROCESS**

Contractor qualifications will be reviewed and assessed to determine if the submitter meets or is capable of meeting the contracting requirements for MORPC's Residential Energy Programs. If there are areas of deficiency (for example, not all of the required trainings have been completed) consideration will be given if the submitter demonstrates how they will meet the requirement (for example, employees will attend the necessary trainings.)

MORPC will pursue agreements with qualified contractors until the capacity of our contractor network is sufficiently large to meet the production needs of our programs.

## V. SCHEDULE

This is an open solicitation that begins on the date in the title of this Request for Qualifications and shall remain active until such time that this Request for Qualifications is no longer available online at [www.morpc.org](http://www.morpc.org) by following the links to “About MORPC” then “RFPs and RFQs.”

Interested parties may submit a Statement of Qualifications at any time while this solicitation is active.

MORPC maintains the right to modify and change this Request for Qualifications from time to time. In such events, this Request for Qualifications document will be replaced with a revised version containing an updated date in the title.

## VI. SUBMISSIONS

Submit Statement of Qualifications to:

Mid-Ohio Regional Planning Commission  
Attn: Steve Garnack  
111 Liberty Street, Suite 100  
Columbus, OH 43215  
[sgarnack@morpc.org](mailto:sgarnack@morpc.org)

Electronic submissions are preferred. Include “HVAC Contractor Statement of Qualifications” in the subject line.

Questions can be addressed to:

Steve Garnack  
Residential Program Manager  
614-233-4108  
[sgarnack@morpc.org](mailto:sgarnack@morpc.org)

A list of frequently asked questions can be found online in the same location as this Request for Qualifications and will be updated from time to time with questions and answers that are relevant to potential responders.

## VII. TERMS & CONDITIONS

The submitter agrees that it will not discriminate against any employee, applicant for employment, or sub-contractor and that it will take affirmative action to insure that employees, applicants and sub-contractors are treated equally during employment without regard to race, color, gender, creed, religion, ancestry, national origin, sexual orientation, disability or other handicap, age, marital/familial status, veteran status, or status with regard to public assistance.

Disadvantaged Vendors shall have the maximum opportunity to participate in the performance of contracts financed under this solicitation. In this regard, all submitters shall take all necessary and reasonable steps to ensure that minority vendors have the maximum opportunity to compete for and perform any subcontracts. Also, proposing firms are encouraged to notify MORPC if they meet one of the disadvantaged vendor designations, such as Minority Business Enterprise (MBE), Small Business Enterprise (SBE), Encouraging Diversity, Growth and Equity (EDGE) or Women-owned Business Enterprise (WBE).

MORPC reserves the right to accept or reject any or all Statements of Qualifications.

MORPC shall not be liable for any costs incurred by the submitter in response to this RFQ, or any costs incurred in connection with any discussions, correspondence or attendance at interviews or negotiation sessions.

All materials submitted in response to this RFQ shall become the property of MORPC and may be returned only at MORPC's option.

All materials received shall be considered public information and shall be open to public inspection.

The following are not part of the proposal requirements but will be requirements in the contract in addition to other contractual requirements.

#### Cancellation

MORPC reserves the right to cancel any contract for failure or refusal of performance, fraud, deceit, misrepresentation, collusion, or any other misconduct on the part of the consultant.

#### Unresolved Finding for Recovery

The selected company affirmatively represents and warrants to MORPC that it is not subject to a finding for recovery under ORC 9.24 or that it has taken appropriate remedial steps required under ORC 9.24 or otherwise qualifies under that section. The company agrees that if this representation or warranty is deemed to be false, the agreement shall be void ab initio as between the parties to this agreement, and any funds paid by MORPC to the company hereunder shall be repaid to MORPC immediately, or an action for recovery may be commenced immediately by MORPC for recovery of said funds.

#### Covenants of Company

The company will be required to covenant and warrant the following:

- a. Consultant is not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in any contract, supported in whole or in part by the funding sources for this project;
- b. Consultant has not within a three (3) year period had one or more public transactions terminated for cause or default;
- c. Consultant will comply with the provisions of Section 1352, Title 31 of the U.S. Code, which prohibits the use of federal funds to lobby any official or employee of any federal agency, or member or employee of Congress; and to disclose any lobbying activities in connection with federal funds.