



3403 Lapeer Road, Port Huron, Michigan 48060 (810) 982-8541

## CONTINUOUS REQUEST FOR PROPOSALS Weatherization Contractor Services

Continuously open contractor roster for shell, mechanical/heating, ventilation and air conditioning (HVAC), electrical, plumbing, ventilation and specialty weatherization work

| Issuing agency          | Blue Water Community Action (BWCA)                                                                                                                                                                                        |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| RFP number              | BWCA-WX-RFP-001                                                                                                                                                                                                           |
| Issue date              | October 1, 2026                                                                                                                                                                                                           |
| Initial review cutoff   | October 30, 2026, at 4:00 p.m. Eastern Time                                                                                                                                                                               |
| Ongoing review cycle    | Scheduled review cutoffs: January 8, April 9, August 13 and October 8, 2027; see Section 1.1                                                                                                                              |
| Posting status          | Continuously open until amended, suspended or closed by written notice                                                                                                                                                    |
| Anticipated term        | December 1, 2026, through September 30, 2027, with up to two additional one-year renewal options                                                                                                                          |
| Submission method       | Email to <a href="mailto:chill@bwcaa.org">chill@bwcaa.org</a> ; fax to 810-982-7233; or sealed hard copy marked "BID PROPOSAL" received by mail, courier or hand delivery at 3403 Lapeer Road, Port Huron, Michigan 48060 |
| Procurement contact     | Candice Hill Weatherization Manager Phone 810-455-6442 <a href="mailto:chill@bwcaa.org">chill@bwcaa.org</a>                                                                                                               |
| Anticipated roster size | Approximately 3–6 contractors overall; the number selected may vary by trade category and qualified responses received                                                                                                    |



"This institution is an equal opportunity provider."



Affiliated Organization

## 1. Solicitation Notice

Blue Water Community Action (BWCA) invites responsive and responsible contractors to submit proposals at any time while this continuous solicitation remains open for Weatherization Assistance Program services in BWCA's designated Michigan service area. BWCA intends to establish and maintain a qualified contractor roster. Placement on the roster does not guarantee a contract, minimum payment, number of assignments or volume of work.

The procurement will provide full and open competition through a publicly advertised Request for Proposals (RFP). Consistent with BWCA's Financial Policies Manual, BWCA will seek at least three written competitive bids for purchases or contracts of \$10,000 or more, document outreach to women-owned, minority-owned and labor-surplus-area firms and present the bid summary and recommendation to the Board for final selection. All evaluation factors and their relative importance are disclosed in this RFP. Contractor location is not an evaluation factor.

### 1.1 Procurement Schedule

| Event                               | Date/time                                                                          | Agency control                                                                                                        |
|-------------------------------------|------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| Continuous public notice begins     | October 1, 2026                                                                    | Supplement with additional advertising                                                                                |
| Optional information session        | October 8, 2026, at 10:00 a.m. Eastern Time                                        | Virtual; attendance is optional and connection information will be posted with the RFP                                |
| Questions                           | Accepted continuously                                                              | Submit only to procurement contact                                                                                    |
| Addenda/Questions and Answers (Q&A) | As issued                                                                          | Posted and shared with affected known proposers                                                                       |
| Initial proposal cutoff             | October 30, 2026, at 4:00 p.m. Eastern Time                                        | Board: November 24, 2026; earliest start: December 1, 2026                                                            |
| January review cutoff               | January 8, 2027, at 4:00 p.m. Eastern Time                                         | Board: January 26, 2027; earliest start: February 1, 2027                                                             |
| April review cutoff                 | April 9, 2027, at 4:00 p.m. Eastern Time                                           | Board: April 27, 2027; earliest start: May 1, 2027                                                                    |
| August review cutoff                | August 13, 2027, at 4:00 p.m. Eastern Time                                         | Board: August 31, 2027; earliest start: September 1, 2027                                                             |
| October review cutoff               | October 8, 2027, at 4:00 p.m. Eastern Time                                         | Board: October 26, 2027; earliest start: November 1, 2027                                                             |
| Board calendar / selection notices  | Last Tuesday of the month; no regular meetings in May, July or December            | Initial notification: November 25, 2026, after board action. Later notices follow approval; timing is not guaranteed. |
| Contract/orientation                | Starts shown are conditional; October cycle requires an authorized subsequent term | No work before board approval, executed contract, release and assignment                                              |

## 1.2 Questions, Addenda and Communications

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- Direct all procurement questions in writing to the procurement contact. Questions affecting competition or requirements will be answered through written addenda or public questions and answers (Q&A).
- BWCA will issue material clarifications through the continuous posting and to known proposers whose pending proposals may be affected.
- Contact with evaluators, board members, program staff or clients regarding this solicitation may be grounds for rejection if prohibited by BWCA procurement policy.
- Proposers are responsible for acknowledging every addendum in the proposal cover form.

## 1.3 Continuous Posting Administration

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- Complete proposals will be evaluated on the scheduled review cycles in Section 1.1. After the initial October 30, 2026 cutoff, anticipated cutoffs are January 8, April 9, August 13 and October 8, 2027, at 4:00 p.m. Eastern Time. Proposals received after a cutoff move to the next scheduled cycle. The Board has no regular meetings in May, July or December. The July review is therefore moved to August. Review or award by a particular date is not guaranteed; changes will be announced by written public notice.
- The procurement file will document the posting period, review dates, supplemental advertising, outreach, proposals received, evaluation records and notices.
- BWCA may amend, temporarily suspend or close this RFP by written public notice when roster needs, funding, program requirements or procurement conditions change.
- If responses are insufficient to support an adequate roster, BWCA will conduct additional advertising or targeted outreach consistent with full and open competition.
- BWCA will review this continuous posting and its supporting procurement procedure at least annually and will refresh or re-establish the Method 1 roster when required by the approved service plan, Michigan Community Services Policy Manual (CSPM), funding terms or BWCA policy.

## 2. Program and Procurement Framework

BWCA administers Michigan Weatherization Assistance Program (WAP) funds, including United States Department of Energy (DOE), Low Income Home Energy Assistance Program (LIHEAP) and other approved funding streams. Work is authorized only after an energy audit, measure approval, funding assignment and BWCA production release. Contractors perform installation; BWCA retains eligibility, audit, scope approval, inspection, Quality Control Inspection (QCI), payment authorization and program oversight responsibilities.

- Michigan Community Services Policy Manual (CSPM) Sections 409 and 410 govern contractor procurement, selection, roster establishment, job award and required contract provisions.
- The CSPM 600 Series; current Bureau of Community Action and Economic Opportunity (BCAEO) weatherization memoranda; the Michigan Weatherization Field Guide; United States Department of Energy (DOE) Standard Work Specifications (SWS); Energy Audit Guide; applicable DOE Job Task Analyses (JTAs); Title 10 of the Code of Federal Regulations (10 CFR) Part 440, Appendix A; the approved energy-audit software and library; manufacturer instructions; and other controlling technical manuals govern the work.
- The resulting contract will be a nonexclusive roster contract. Job assignments are separate written authorizations.
- BWCA does not permit verbal change orders. Additional, substitute or omitted work requires prior written BWCA authorization or a revised assignment.

### 3. Service Categories

A proposer may submit for one or more categories. The proposal must identify every category requested and demonstrate the required licensing, certification, staffing, equipment and capacity for each.

| Category                                             | Typical services                                                                                                                                                              | Minimum trade controls                                                                                                                                                                                                                                                                                                       |
|------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A - Shell                                            | Air sealing; attic, wall, floor, foundation and manufactured-home insulation; ventilation prep; incidental repairs                                                            | Michigan residential builder or appropriate Maintenance and Alteration (M&A) license; Occupational Safety and Health Administration (OSHA) training; lead-safe and United States Environmental Protection Agency Renovation, Repair and Painting (EPA RRP) credentials as applicable; trained retrofit installer/crew leader |
| B - Heating, Ventilation and Air Conditioning (HVAC) | Furnace, boiler, heat pump, water heating, venting, combustion air, repair/replacement/startup                                                                                | Applicable Michigan mechanical license/classification; permits; Manual J when required; combustion and startup documentation                                                                                                                                                                                                 |
| C - Electrical                                       | Approved wiring, circuits, devices, alarms and ventilation power/control work                                                                                                 | Applicable Michigan electrical contractor/master licensing; permits                                                                                                                                                                                                                                                          |
| D - Plumbing                                         | Approved piping, water-heating connections, condensate and limited plumbing corrections                                                                                       | Applicable Michigan plumbing licensing; permits                                                                                                                                                                                                                                                                              |
| E - Ventilation                                      | American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) Standard 62.2 whole-building/local exhaust installation, controls, ducting and termination | Trade licensing as applicable; airflow verification capability; manufacturer and BWCA setup documentation                                                                                                                                                                                                                    |
| F - Specialty                                        | Approved refrigerators, lighting, limited appliance or specialty measures                                                                                                     | Manufacturer authorization/licensing as applicable; decommissioning and disposal documentation                                                                                                                                                                                                                               |

### 4. Technical Scope and Performance Requirements

#### 4.1 Governing Standards

- Current Michigan Weatherization Field Guide and approved updates or clarifications.
- DOE SWS and 10 CFR Part 440, including Appendix A material standards.
- Michigan CSPM, BWCA contract, approved work order, job assignment, quality control checklist and written instructions.
- Building Performance Institute (BPI) standards identified by Michigan or DOE for applicable diagnostics and verification.
- Applicable federal, state, county and local codes, permits, licensing rules, Occupational Safety and Health Administration (OSHA) requirements and manufacturer instructions.
- Lead-Safe Weatherization and United States Environmental Protection Agency Renovation, Repair and Painting (EPA RRP) requirements, as well as asbestos/vermiculite, mold/moisture, combustion safety and other health-and-safety requirements, as applicable.

#### 4.2 Included Cost

Each unit price must include all labor, supervision, materials, delivery, equipment, mobilization, permits, disposal, cleanup, overhead, insurance, required documentation, callbacks and all other costs necessary for a complete compliant installation, unless the price schedule expressly identifies an allowable separate item.

#### 4.3 Assignment and Completion

1. BWCA issues a written work assignment containing the property, authorized scope, agency-average approved price and completion deadline. A contractor may not alter pricing, quantities or measures without prior written BWCA approval.

2. The contractor returns acceptance or refusal within three business days unless the assignment states a different controlled deadline.
3. For a single-unit job, the default production expectation is completion and QCI-ready status within 45 calendar days of preliminary award, unless BWCA approves another written deadline.
4. The contractor schedules directly with the client after acceptance, maintains professional communication and promptly reports access or cooperation barriers.
5. The contractor stops and contacts BWCA when field conditions differ from the assignment, safety is uncertain, concealed conditions are found or a substitution appears necessary.
6. The contractor submits the complete closeout packet and notifies BWCA that the job is ready for inspection.

**No unauthorized work:** BWCA will not pay for unassigned, substituted, additional or materially changed work performed without prior written authorization. Client requests do not authorize work.

#### 4.4 Warranty and Corrections

The contractor must warrant labor and materials for at least eighteen months from BWCA acceptance following inspection. On the first failed Quality Control Inspection (QCI), the contractor must correct the work within one week or BWCA's stated written deadline. A second failed inspection may result in a \$50 reinspection fee. On a third failed inspection, BWCA may assign another contractor to complete or correct the work, and the original contractor will not be paid for failed measures. Payment does not waive latent defects, warranty duties or program requirements.

#### 4.5 Performance Remedies / Planned Liquidated Damages

BWCA will evaluate performance using the approved service-plan benchmarks: quality of work, timeliness, documentation, client relations and compliance/safety. Five jobs are reviewed using file review, client feedback and inspection results; contractors are expected to meet every benchmark. A finding occurs when a contractor fails three benchmarks on any job, fails the same benchmark three times across five jobs, or averages below 3.5. Three findings result in a 30-day suspension; six findings within six months result in termination, subject to required notice, appeal rights and contract terms.

### 5. Mandatory Contractor Qualifications

| Requirement                                                                                                                                                                                                                                        | Provided                                                                                               | Reviewer |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|----------|
| Completed proposal cover form and requested trade categories                                                                                                                                                                                       | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not Applicable (N/A) | _____    |
| Legal business name, ownership, address, contact information and W-9                                                                                                                                                                               | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A                  | _____    |
| Michigan licenses required for every proposed service category                                                                                                                                                                                     | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A                  | _____    |
| General liability, workers' compensation, commercial automobile and umbrella insurance meeting the exact BWCA-approved limits; A.M. Best A-rated or better carrier; waiver of subrogation; and primary/noncontributory additional-insured status   | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A                  | _____    |
| United States Environmental Protection Agency Renovation, Repair and Painting (EPA RRP) firm and worker credentials when applicable                                                                                                                | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A                  | _____    |
| Required training: Blower Door, Lead-Safe Work, Health and Safety, current Renovator certification before work, EPA-certified firm, Retrofit Installer/Crew Leader, Mobile Home, OSHA 10/30 and Sexual Harassment, as applicable to assigned staff | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A                  | _____    |
| Personnel training/experience aligned with applicable DOE JTAs; MiTEC Learning Management System registration and post-award BWCA orientation                                                                                                      | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A                  | _____    |
| Required equipment, tools, personal protective equipment (PPE) and diagnostic capability                                                                                                                                                           | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A                  | _____    |

| Requirement                                                                                                                                                                                                                                                            | Provided                                                                              | Reviewer |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|----------|
| At least three references or documented relevant experience                                                                                                                                                                                                            | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Capacity statement: crews, service area capability, annual jobs and maximum open work                                                                                                                                                                                  | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Background-screening compliance for personnel with unsupervised client contact: National Sex Offender Registry, residency and criminal-history attestation, criminal-conviction history and Central Registry clearance, with any additional BWCA/funding-source checks | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| W-9 and agreement to annual System for Award Management (SAM.gov) exclusion verification and disclosure of exclusions                                                                                                                                                  | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Conflict-of-interest, non-collusion, lobbying and debarment certifications                                                                                                                                                                                             | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Agreement to confidentiality, client protection and records-access requirements                                                                                                                                                                                        | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Complete price schedule for each proposed category; no required price left blank                                                                                                                                                                                       | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |

Minimum insurance: an A.M. Best A-rated or better carrier; waiver of subrogation on all policies; BWCA as additional insured on a primary and noncontributory basis; commercial general liability of \$1,000,000 combined single limit per occurrence, \$1,000,000 personal and advertising injury, \$2,000,000 products/completed operations aggregate and \$2,000,000 general aggregate; plus umbrella liability of \$1,000,000 per occurrence and aggregate. Workers' compensation and commercial automobile coverage must meet applicable law and the executed contract.

## 6. Proposal Submission Requirements

| Tab | Required content                                                  | Evaluation status          |
|-----|-------------------------------------------------------------------|----------------------------|
| 1   | Proposal Cover Form; authorized signature; addenda acknowledgment | Pass/fail responsiveness   |
| 2   | Business profile, ownership and requested categories              | Scored                     |
| 3   | Licenses, certifications, insurance and training documents        | Pass/fail + scored         |
| 4   | Technical approach and quality-control plan                       | Scored                     |
| 5   | Staffing, equipment and production capacity                       | Scored                     |
| 6   | Relevant experience, performance history and references           | Scored                     |
| 7   | Completed unit-price schedule                                     | Scored                     |
| 8   | Certifications, disclosures and required federal/state forms      | Pass/fail                  |
| 9   | Exceptions to RFP/contract terms, clearly identified              | Responsiveness/risk review |

Proposals must be complete, signed and received by 4:00 p.m. Eastern Time through one of the following methods: (1) email to [chill@bwcaa.org](mailto:chill@bwcaa.org), with receipt established by BWCA's email timestamp; (2) fax to 810-982-7233, with receipt established by BWCA's fax record; or (3) sealed hard copy marked "BID PROPOSAL," received by mail, courier or hand delivery at 3403 Lapeer Road, Port Huron, Michigan 48060. Mailed proposals must be received—not merely postmarked—by the applicable cutoff. These methods are permitted under BWCA's Financial Policies Manual unless an addendum or controlling funding requirement requires a stricter method. Proposals received after a scheduled cutoff move to the next review cycle.

## 7. Price Proposal

- Use the BWCA Weatherization Measure Unit Price Workbook issued with the RFP. Do not alter measure names, units or formulas.
- Submit labor and material prices in the form required by BWCA and identify any requested category not bid.
- For every requested trade category, mark each applicable measure “Bid” and provide both labor and material pricing. Enter \$0.00 when one component has no separate charge. “No Bid” may be used only for measures outside the proposer’s requested trade categories. A blank status or required price makes the affected category incomplete and may result in rejection.
- Prices must support compliant installation regardless of the technique used and must include all ordinary costs stated in Section 4.2.
- Weatherization measures not listed in Appendix D may be competitively procured, negotiated job-by-job on a time-and-materials basis within procurement authority, requested through a supplemental bid or deleted. Other materials may be substituted only with prior written BWCA approval. The Weatherization Assistance Program is subject to applicable average-cost-per-unit limits for each program year. Contractors performing non-listed or time-and-materials work must remain within the authorized written maximum and proceed beyond it only at their own risk; BWCA will not pay costs exceeding the written authorization.
- By submitting a proposal, the proposer agrees that BWCA will evaluate completeness and price reasonableness and average the accepted labor and material prices submitted by all awardees under CSPM Section 409 Method 1. BWCA will place the approved agency-average prices in the standardized audit library. Contractors awarded work will be paid the approved agency-average price stated in the executed agreement or written amendment rather than their individual proposed price. BWCA may request clarification without permitting an improper proposal revision and may reject unreasonable pricing.
- BWCA conducts an annual contractor-pricing update as a standard practice. All active roster contractors will receive the same notice, workbook, deadline and submission instructions and may email the completed workbook to the procurement contact. BWCA will review price reasonableness and recalculate the agency-average approved prices. Before revised prices are incorporated into the Weatherization Assistance Web system (WAweb), National Energy Audit Tool (NEAT) or Manufactured Home Energy Audit (MHEA) library, BWCA will submit the complete library pricing to Bureau of Community Action and Economic Opportunity (BCAEO) technical staff for review and written approval or correction. Approved prices and their prospective effective date will be documented through a written contract amendment and any required Board approval. Updates are not retroactive, do not create contractor-specific price libraries, do not guarantee acceptance of any proposed price and do not automatically renew a contract. Material changes may require a new competitive procurement.

## 8. Evaluation and Selection

A selection committee will review responsiveness, document conflicts, score proposals independently, reconcile scores and document selection or rejection. Mandatory qualifications must be met before weighted scoring.

| Factor                                           | Points | What evaluators consider                                                                 |
|--------------------------------------------------|--------|------------------------------------------------------------------------------------------|
| Technical approach and WAP quality system        | 20     | Understanding of Field Guide/SWS; installation control; safety; documentation; callbacks |
| Staff qualifications and training                | 15     | Licenses, certifications, JTA-aligned experience, training plan                          |
| Capacity, equipment and schedule                 | 15     | Crews, tools, open-work limits, 45-day readiness, continuity                             |
| Relevant experience and past performance         | 15     | WAP or comparable work, inspection results, timeliness, references                       |
| Compliance and business controls                 | 10     | Insurance, reporting, confidentiality, fiscal controls, complete disclosures             |
| Price and price reasonableness                   | 20     | Evaluated price scenario/unit prices; completeness; value                                |
| Women- and minority-owned business participation | 5      | Documented status/participation; required CSPM 409 scoring factor                        |
| TOTAL                                            | 100    | Award to responsible offeror(s) most advantageous to BWCA                                |

**Prohibited factor:** Contractor location will not receive points. Prior experience in the service area may be evaluated only as relevant experience, consistent with CSPM 409.

## **9. Roster, Contract and Job Assignment**

### **9.1 Contract Term**

The initial contract term is anticipated to begin December 1, 2026, and continue through September 30, 2027. Contractors approved during the initial term will receive an effective date in their executed agreement and share the September 30, 2027 expiration date. No work assignments may be issued before board approval, execution of the agreement, required onboarding and written release. Starts shown in Section 1.1 are earliest anticipated dates, not guaranteed dates. BWCA may exercise up to two additional one-year renewal options, subject to funding, performance, price review, continued need and required approvals. Awards from the October 2027 review cycle may begin only under an authorized subsequent term, with effective and expiration dates stated in the executed agreement; they do not authorize retroactive work or extend an expired contract. Continuous RFP availability does not extend any agreement, and no renewal is automatic.

### **9.2 Fair Assignment Method**

Under CSPM Section 409 Method 1, BWCA will distribute work equitably among active, qualified contractors through documented rotation and capacity controls. Each assignment will use the standardized audit scope and agency-average approved unit prices. The assignment record will identify the contractor selected and any documented reason for bypass, refusal or reassignment.

- Current capacity and ability to meet the written completion deadline.
- Good standing, unresolved corrective work, suspension status and the amount of open work.
- Applicable trade/category eligibility, licensing, insurance, training and background-screening status.
- Documented refusals, client or safety restrictions and other contract-defined exceptions.
- BWCA will not use contractor location or undisclosed preferences to assign work. Declines and reassignments will be documented and monitored for equitable distribution.

### **9.3 No Guarantee**

Roster status is not a promise of work. Assignments depend on funding, client eligibility, audits, approved measures, contractor eligibility, cost reasonableness, capacity and program need.

## **10. Documentation, Inspection, Invoicing and Payment**

### **10.1 Required Closeout Documentation**

- Signed assignment acceptance and approved work order/price documentation.
- Required pre-, in-progress and post-work photographs, including concealed work before closure.
- Material/product labels, insulation certificates, disposal/decommissioning records and warranty information.
- Permits, Manual J, startup sheets, combustion/venting records, fan setup and airflow documentation when applicable.
- Crew/installer identification and required certifications for the work performed.
- Itemized invoice by job identifier, measure, labor/material cost and applicable cost category/funding source.

### **10.2 Inspection and Payment**

BWCA will compare the work order, assignment, field conditions, required records, invoice and QCI results before payment. Work that does not pass inspection is not ready for payment. The contractor must complete corrections and return documentation within the stated deadline. BWCA may conduct in-progress inspections and monitoring visits.

## 11. Required Contract Conditions

| Provision                                               | Application/control                                                                                                                                                                                                                                                                                                                                                               |
|---------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Remedies for breach                                     | Required above the simplified acquisition threshold; BWCA contract will state administrative, contractual and legal remedies.                                                                                                                                                                                                                                                     |
| Termination                                             | Required for contracts above \$10,000; cause, circumstances beyond BWCA control, process and settlement basis.                                                                                                                                                                                                                                                                    |
| Suspension/debarment                                    | Annual SAM.gov verification using the contractor's W-9 and documentation of exclusion status; required federal suspension/debarment clauses when applicable.                                                                                                                                                                                                                      |
| Independent contractor/indemnification                  | Contractor status, hold harmless and indemnification, subject to BWCA legal review.                                                                                                                                                                                                                                                                                               |
| Conflict of interest/gratuities                         | 2 CFR 200.318 and BWCA standards of conduct.                                                                                                                                                                                                                                                                                                                                      |
| Waste, fraud and abuse                                  | No employee, officer, agent or evaluator may participate when a real or apparent financial, family, business or prospective-employment conflict exists. Disclose and recuse. Prohibited gratuities and gifts include any item barred by BWCA policy; BWCA's policy prohibits gifts over \$25, and this solicitation prohibits offering any gratuity connected to the procurement. |
| Legal/regulatory changes                                | Required changes incorporated; other changes require written bilateral amendment.                                                                                                                                                                                                                                                                                                 |
| Authority to contract                                   | Business and signer possess legal authority; false authority is grounds for action.                                                                                                                                                                                                                                                                                               |
| Equal employment opportunity                            | Applicable Appendix II and Title 41 of the Code of Federal Regulations (41 CFR) provisions for federally assisted construction.                                                                                                                                                                                                                                                   |
| Davis-Bacon/Copeland                                    | Apply when the funding award/project is covered. Required wage determinations will be attached and posted at least 10 calendar days before bid opening; if award is not made within 90 days, an updated determination will be incorporated unless the United States Department of Labor grants an extension.                                                                      |
| Contract Work Hours and Safety Standards                | Apply when threshold and work type require it.                                                                                                                                                                                                                                                                                                                                    |
| Clean Air/Clean Water                                   | Apply to contracts and subcontracts exceeding \$150,000.                                                                                                                                                                                                                                                                                                                          |
| Byrd Anti-Lobbying                                      | Certification for awards exceeding \$100,000 and required lower-tier disclosures.                                                                                                                                                                                                                                                                                                 |
| Records/access/retention                                | Access for BWCA, BCAEO, DOE, auditors and authorized officials; retain for required period and through unresolved matters.                                                                                                                                                                                                                                                        |
| Confidentiality                                         | Protect state/client information; disclose only for authorized program work; bind employees/subcontractors.                                                                                                                                                                                                                                                                       |
| Energy efficiency and Build America, Buy America (BABA) | Apply energy-efficiency and Build America, Buy America conditions when applicable to the award/project.                                                                                                                                                                                                                                                                           |
| BCAEO contract submission                               | BWCA will upload a copy of each signed subcontract of \$25,000 or more to BCAEO's external SharePoint within 30 days after approval, as required by CSPM Section 409.                                                                                                                                                                                                             |

## 12. Reservations, Protest and Records

Contract authorization: Contracts of \$10,000 or more and contracts lasting more than one year require Board review/approval under BWCA policy. The Executive Director and Board Chairperson are the authorized signers. Amendments and annual price changes must be maintained in the Finance and program contract records.

- BWCA may reject any or all proposals, amend, temporarily suspend or close the continuous solicitation, request clarification, negotiate where permitted, and make multiple or partial category awards.
- BWCA will document the procurement history, including procurement method, contract type, public notice, proposals, evaluator conflicts, scores, selection/rejection and basis for price.
- A proposer or contractor may submit a written appeal of a denial, suspension, termination or nonrenewal to the Appeals Committee, Blue Water Community Action, 3403 Lapeer Road, Port Huron, Michigan 48060, within 10 working days of the written action. The Appeals Committee will consist of impartial agency representatives designated under BWCA's Board-approved policies; no member may have participated materially in the challenged decision or have a conflict of interest. The appeal must identify the solicitation or contract, facts, requested remedy and supporting documents.
- BWCA will offer an informal hearing within seven business days and issue a written decision within 30 calendar days, with the aggregate appeal process completed within 60 days, consistent with the Board-approved Agency Policies. Filing does not automatically stay an award or action unless required by policy or directed in writing.
- Proposal materials are subject to applicable public-record, grant, audit and retention requirements. Proposers must clearly identify claimed confidential commercial information; BWCA cannot guarantee withholding contrary to law.

## Appendix A - Proposal Cover Form

| Field                                                   | Proposer response                                                                                                                                                 |
|---------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Legal business name                                     |                                                                                                                                                                   |
| Doing business as (DBA)                                 |                                                                                                                                                                   |
| Entity type                                             |                                                                                                                                                                   |
| Federal Employer Identification Number (EIN)            |                                                                                                                                                                   |
| Unique Entity Identifier (UEI), if applicable           |                                                                                                                                                                   |
| System for Award Management (SAM.gov) status/expiration |                                                                                                                                                                   |
| Primary contact                                         |                                                                                                                                                                   |
| Address                                                 |                                                                                                                                                                   |
| Phone/email                                             |                                                                                                                                                                   |
| Requested categories                                    | <input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C <input type="checkbox"/> D <input type="checkbox"/> E <input type="checkbox"/> F |
| Addenda acknowledged                                    |                                                                                                                                                                   |
| Authorized signer/title                                 |                                                                                                                                                                   |
| Signature/date                                          |                                                                                                                                                                   |

## Appendix B - Technical Response

**Describe the proposed trade categories, crew structure and responsible supervisor.**

Response: \_\_\_\_\_

**Explain how the company ensures compliance with the Michigan Field Guide, DOE SWS, work orders and manufacturer instructions.**

Response: \_\_\_\_\_

**Describe jobsite safety, lead-safe, asbestos/vermiculite, moisture, combustion and stop-work practices.**

Response: \_\_\_\_\_

**Describe scheduling, client communication and the ability to meet 45-calendar-day completion expectations.**

Response: \_\_\_\_\_

**Describe in-progress quality controls, documentation review, final readiness and callback prevention.**

Response: \_\_\_\_\_

**Identify equipment, diagnostic tools, calibration controls, vehicles and specialty capabilities.**

Response: \_\_\_\_\_

**State annual and concurrent job capacity and any proposed limit on outstanding work.**

Response: \_\_\_\_\_

**Provide relevant experience, including prior BWCA/Grantee work if any, inspection pass rates if available, three references, and any contract terminations or unresolved findings in the last three years.**

Response: \_\_\_\_\_

**Describe training completed and the plan for maintaining required credentials and attending BWCA/BCAEO orientation or refresher training.**

Response: \_\_\_\_\_

## Appendix C - Mandatory Document Checklist

| Requirement                                                                       | Provided                                                                              | Reviewer |
|-----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|----------|
| Proposal Cover Form                                                               | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| W-9                                                                               | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Michigan entity/assumed-name documentation                                        | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Trade licenses                                                                    | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| EPA RRP firm and worker certificates                                              | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Required training records, including OSHA 10/30 and service-plan credentials      | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| General liability and umbrella certificates with required endorsements            | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Workers' compensation certificate or lawful exemption                             | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Commercial automobile certificate with required endorsements                      | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Equipment list                                                                    | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Staff roster, qualifications, MiTEC status and background-screening certification | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Capacity statement                                                                | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| References                                                                        | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Price workbook                                                                    | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Conflict/non-collusion certification                                              | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Debarment/SAM.gov certification                                                   | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Lobbying certification when applicable                                            | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Exceptions list                                                                   | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |

## Appendix D - Unit Price Workbook Instructions

- BWCA will issue the controlled Weatherization Measure Unit Price Workbook with this RFP. (see **Excel File: BWCA-WX-RFP-001 Appendix D**)
- Return the workbook in its native Microsoft Excel format and a signed Portable Document Format (PDF) certification page if required by BWCA. Contractors may not remove worksheet protection or alter controlled fields or formulas.
- Do not rename measures, alter source codes or units, delete rows, modify formulas or enter qualifications inside price cells. Use "No Bid" only for measures outside the requested trade categories; every applicable measure within a requested category must be priced.
- Use the narrative exceptions form for any exception. A required blank price may make the proposed category incomplete.
- The executed contract, written amendments and BWCA's agency-average Weatherization Assistance Web system (WAweb) pricing library control approved prices after award. Individual contractor bid prices do not control payment.

## Appendix E - Evaluator Scorecard

| Factor                                           | Maximum   | Evaluator score | Notes/evidence |
|--------------------------------------------------|-----------|-----------------|----------------|
| Responsiveness and mandatory qualifications      | PASS/FAIL |                 |                |
| Technical approach and quality system            | 20        |                 |                |
| Staff qualifications and training                | 15        |                 |                |
| Capacity, equipment and schedule                 | 15        |                 |                |
| Experience and past performance                  | 15        |                 |                |
| Compliance and business controls                 | 10        |                 |                |
| Price and price reasonableness                   | 20        |                 |                |
| Women- and minority-owned business participation | 5         |                 |                |
| TOTAL                                            | 100       |                 |                |

Evaluator conflict disclosure: ☐ No conflict identified ☐ Recusal required

Evaluator: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Appendix F - Certifications and Disclosures

| Requirement                                                                                              | Provided                                                                              | Reviewer |
|----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|----------|
| Proposal is independently prepared and not collusive                                                     | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| No undisclosed organizational or personal conflict of interest                                           | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| No prohibited gratuity, favor or item of monetary value offered                                          | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Business and principals are not suspended, debarred or excluded                                          | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| No false statement or material omission is included                                                      | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Lobbying certification and disclosure completed when threshold applies                                   | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Women/minority-owned status and any optional business-designation information are accurately represented | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| All proposed subcontractors are identified and subject to BWCA approval                                  | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Contractor will protect client/state confidential information                                            | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |
| Contractor accepts audit, monitoring, record-access and retention requirements                           | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A | _____    |

By signing, the proposer certifies that the proposal is accurate, independently prepared, valid for 120 calendar days from the applicable submission cutoff and submitted without collusion; that the signer has authority to bind the proposer; and that all known conflicts of interest, exclusions, exceptions and proposed deviations from the RFP have been fully disclosed.

Authorized signer: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_