

COUNTY OF HIDALGO COMMUNITY SERVICE AGENCY
Repairs, Replacement and/or Retrofit Central Heating and/or Cooling Systems
Proposal No. 2010-156-05-05-otm

**SERVICE DELIVERY TERMS AND CONDITIONS
AND
PRODUCT AND SERVICE SPECIFICATIONS**

CHCSA is seeking at a minimum of one (1) primary and one (1) secondary qualified contractor to provide services to Repair, Replacement and Retrofit of HVAC Systems in eligible low-income dwellings throughout Hidalgo County. These services are delivered pursuant to the CEAP Program and are designed to lower utility usage and promote energy conservation.

A contract, if any, awarded pursuant to this solicitation may be extended provided all terms and conditions, except for the contract period, remain unchanged and in full force and effect. This option, if exercised, requires the mutual agreement of BOTH parties. Refusal by either party to exercise this Option to extend shall require this contract to expire on the original or mutually agreed date. The normal extension period shall be in one (1) year increments. The total period of this contract, including all extensions, may not exceed a maximum combined period of four years.

Funds for a contract, if any, resulting from this solicitation have been or are anticipated to be provided through the Texas Department of Housing and Community Affairs pursuant to the United States Department of Health and Human Services. Services under this program are contingent on CHCSA's receipt of CEAP Program funds.

Delivery of all products/services specified in this proposal shall be made to the address shown on each individual service request. Such address shall be the home occupied by an eligible CEAP program participant residing anywhere within the service area.

Delivery of all products/service specified in this proposal shall be made within 10 working days (defined as Monday through Friday except for Federal or State Holidays) or time agreed upon by said contractor and CHCSA. Exceptions to this requirement shall be allowed only in the event an eligible program participant is unavailable for service delivery scheduling (which instances must be documented and provided to CHCSA designated program staff).

Payment for Products/Services: There shall be no advance payment for products delivered and/or service provided for the successful proposer, if any, selected for contract pursuant to this procurement. Contractual payment terms and conditions, if a contract is awarded, shall specify that payment shall normally be made 30 to 60 days from date of service and agency approval.

All installations, repairs, disposals and any other service provided pursuant to this solicitation must meet applicable Federal, State and/or local codes, whichever shall be the most restrictive. Proposer shall be responsible for obtaining any required permits and payment of any required payment fee, as applicable.

All installations, repairs, and any other product or service provided pursuant to this solicitation must be guaranteed, in writing, for a minimum period of one year from the invoice date. Compressors for Central AC systems shall be warranted for a minimum period of three years.

The successful proposer, if any, shall be contractually obligated to complete any warranty work within 3 working days of notification. In life threatening situations (i.e. non-functioning heaters in winter or nonfunctioning AC's in summer and elderly or infirm clients residing in the household), the successful proposer shall be required to provide warranty work within 24 hours of notification

HVAC assessments, if any, completed pursuant to this solicitation must be completed by a licensed HVAC professional. The assessment of existing heating/cooling appliances (including heating/cooling appliance efficiency and heating appliance safety) and identification of eligible HVAC retrofit measures must be documented and submitted for agency review and approval. Proposer must complete a HVAC assessment form (see example Appendix 1 to this solicitation) for each HVAC assessment conducted pursuant to this solicitation. Heat Load Calculation (approved by CHCSA) may be requested on a case by case basis.

EXHIBIT "A" con't

COUNTY OF HIDALGO COMMUNITY SERVICE AGENCY Repairs, Replacement and/or Retrofit Central Heating and/or Cooling Systems Proposal No. 2010-156-05-05-otm

ENTIRE SCOPE OF THE COMPREHENSIVE ENERGY ASSISTANCE PROGRAM REPLACEMENT, REPAIR OR RETROFIT OF HEATING/COOLING SYSTEMS (Informational Purposes Only)

The Replacement, Repair, and Retrofit of Heating and Cooling Systems component of CEAP stands alone and does not require that the client already received other CEAP assistance. This program component gives CEAP flexibility in addressing a household's energy needs while at the same time reducing its energy burden.

This component remains subject to all eligibility requirements that apply to other CEAP components. The Heating/Cooling component should help clients achieve energy self-sufficiency by addressing inefficient heating and cooling appliances. Inefficient home appliances consume great amounts of energy and increase energy burden. Inordinately high energy bills during the heating or cooling season would indicate the need for an assessment of the condition of all major heating and cooling appliances in the client's home. The retrofit, repair, or replacement of a heating/cooling appliance must cost no more than the energy saved and must result in a reduction of energy consumption. Heating and cooling appliances may include water heaters and refrigerators and shall be considered in the assessment of condition and efficiency of all household appliances. Propane tanks may be considered when propane is used for heating.

Any replacement, repair, or retrofit must be based on need, i.e., an energy assessment of all major heating/cooling appliances has determined that the retrofit, repair, or replacement of a heating/cooling appliance will result in a reduction of energy consumption. Subrecipients shall give priority to appliances with the highest energy usage. The Program allows replacement of evaporative coolers with refrigerated air only for medical reasons. Subrecipients must replace appliances with Energy Star® rated equipment or must meet Texas Department of Energy Weatherization Assistance Program minimum energy efficiency ratings and standards if Energy Star® is not available. If estimated repair cost exceeds 60 percent or more of estimated replacement cost, a replacement unit shall be installed.

The Replacement, Repair, or Retrofit of Heating and Cooling Systems component uses the same eligibility criteria as other CEAP components. Energy efficiency assessments of central heating/cooling systems must be conducted by either a licensed HVAC professional or Weatherization assessor/ auditor approved to use the EASY Audit and holding a current HVAC license. The EASY Audit may be used in conjunction with the efficiency evaluation. Documentation of the assessment results must be placed in the client files. Energy efficiency assessments of window units, evaporative coolers, space heaters, water heaters and refrigerators may be conducted by trained agency staff. Documentation of the assessment results must be placed in the client files. In contracting out for the service, the subrecipient must follow the General Policy Issuance #02-10.2 for procuring goods and services.

The services may include cleaning, tuning, and evaluation of systems, repair and replacement of existing components, and replacement of inefficient systems including:

- Water heaters;
- Refrigerators (In order to ensure energy savings, TDHCA generally recommends refrigerators with freezer on top, no through-the-door ice dispenser, and a 22 cubic feet volume limit.);
- Cooling systems (including duct systems), such as central air conditioners, window air conditioners, and evaporative coolers; and
- Heating systems, such as central/wall/floor furnaces, space heaters, wood burning stoves.

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Heating system assessments must measure carbon monoxide output for all combustion appliances located in conditioned spaces.

Energy assessments should include, at a minimum the following information on all major heating and cooling appliances to include water heaters and refrigerators:

- Type of appliance
- Fuel used
- Size of appliance
- Age of appliance
- Input/Output BTU
- Efficiency rating
- Location of appliance
- Condition
- Size of room where appliance is used
- Recommendation

All repairs, retrofits or replacements must be performed to meet all local codes (use Council of American Building Officials (CABO) when no code exists). Replacement appliances must meet Department prescribed minimum energy efficiency standards or better. For most appliances, the Energy Star® label (conferred under standards established by the U.S. Department of Energy and the Environmental Protection Agency) indicates the high efficiency standard. To find the most current Energy Star appliance ratings, visit the web site: http://www.energystar.gov/index.cfm?fuseaction=find_a_product.

- Central Heat Systems: Gas or Electric
- Central Air Conditioners
- Whole House Window/Through Wall Conditioners (220 volt)
- Room Air Conditioners (120 volts)
- Water Heaters

No Energy Star® standard exists for these two appliance types:

- Wall/Floor Furnaces and Vented Space Heaters:
Gas (only) AFUE* = .80
- Unvented Space Heaters must have a factory installed Oxygen Depletion Sensor System with automatic shutoff. Repair, replacement, or retrofit must reduce CO levels to 25 ppm or less.
Gas (only) AFUE = .92
- Kerosene space heaters shall not be allowed.
- Only in Crisis situations and only as a last resort should subrecipients provide electric space heaters to clients.

*AFUE – Annual Fuel Utilization Efficiency

State Contract Purchases – Available and Recommended

As agencies contracted to perform State business, LIHEAP subrecipients may use State purchase contract vendors to procure heating, ventilating, and air conditioning (HVAC) equipment for LIHEAP program clients. Visit the Texas Building and Procurement Commission web site to check for available vendors -- http://www.tbpc.state.tx.us/cat_page/cat_031_a1_0403.html.

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**ENTIRE SCOPE OF THE COMPREHENSIVE ENERGY ASSISTANCE PROGRAM
REPLACEMENT, REPAIR OR RETROFIT OF HEATING/COOLING SYSTEMS
(Informational Purposes Only)**

The State of Texas conducts competitive solicitations to identify equipment and material vendors to provide specified merchandise at discounted prices to State agencies and their contracted agents. Unless a local vendor is identified through a competitive solicitation that will provide equal or better materials and services at the same price or less, subrecipients must purchase any equipment, materials, or services paid for with LIHEAP funds from a vendor participating in the Texas Building and Procurement Commission's Cooperative Purchasing Program.

TDHCA identified Sears Contract Sales for a special state purchase program. Sears provides 18 cubic foot Energy Star® rated refrigerators delivered, installed, and old refrigerators removed and recycled for \$505. In order to use this Sears vendor agreement, a State contractor must order at least 10 refrigerators at a time. Other sizes may be available at the same price. Unless a local vendor is identified through a competitive solicitation that will provide equal or better materials and services at the same price or less, subrecipients should purchase any refrigerators paid for with LIHEAP funds from the Sears vendor, Gail Cairnie #3845, Sears Contract Sales, Central Property Management, Office: (512) 258-2553; cell: (512) 762-1892; or fax: (512) 288-3255.

To purchase from the State's Cooperative Purchasing Division, please contact:

| | |
|--|--|
| Texas Building and Procurement Commission Attn: Cooperative Purchasing Program 1711 San Jacinto Austin, TX 78701 http://www.tbpc.state.tx.us/stpurch/coopmain.html | Cooperative Purchasing Program Texas Building and Procurement Commission (512) 463-3368 P.O. Box 13047 Austin, TX 78711-3047 |
|--|--|

Participants must pay an annual fee of \$100, allowed by CEAP as an "Administrative" expense. By using the Cooperative Purchasing Division, a subrecipient does not have to competitively solicit for materials purchased; only the labor costs need be solicited.

In order to fulfill the program goals of energy conservation and reducing energy burden, all old appliances that have been replaced must be removed from the home and disposed of in compliance with all state and federal regulations. When heating and cooling appliances, water heater appliances, and refrigerators are replaced, the client must surrender the old unit for disposal. With all units removed, subrecipient must render units inoperable and disposed of in compliance with all applicable federal, state, and local requirements. All unvented space heaters replaced must be rendered unusable and irreparable.

All existing refrigerators in single or multi-family households must undergo either metered testing or bear a manufactured date inscription of 1993 or earlier. Results of meter testing must demonstrate a minimum estimated annual energy consumption of 1250 kWh for the client to be eligible for refrigerator replacement with an energy efficient refrigerator. Replacement refrigerators must bear the Energy Star® label. The program allows only one refrigerator per eligible household. Subrecipient must maintain documentation in the client file of the metering results (or appliance age), kilowatt per hour (kWh) usage of the new refrigerator, and the total cost – including installation of the new refrigerator and disposal of old appliance.

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When the client rents, the subrecipient may assign ownership of the new appliance either to the tenant or the landlord. If assigned to the tenant, the subrecipient must document by a written statement signed by the landlord that the appliance is owned by the client (tenant) and that the landlord relinquishes any claims to the appliance. If assigned to the landlord, the subrecipient must obtain written agreement from the landlord that the housing unit served by the appliance will remain available only to low-income tenants. Subrecipient must maintain documentation of the transaction in the client file in either case.

Real benefits to the household are based on the energy efficiency needs of the dwelling, as determined by an appliance energy assessment.

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MINIMUM STANDARDS

HEATING SYSTEMS

Central Heaters
(Gas/electric)

Must be assessed by a HVAC professional
Replacement must be Energy Star Rated

All existing gas or propane systems must be tested for Carbon Monoxide output during the assessment phase

COOLING SYSTEMS

Central Air

Must be assessed by a HVAC professional
Replacement must be Energy Star Rated

DUCT SYSTEMS

Must be assessed by a HVAC professional
Must be repaired where feasible
Minimum of R8 insulation rating

**ASSESSMENT OF APPLIANCE(S) MUST BE THOROUGH,
ASSESSMENT FORM MUST BE COMPLETED AND MUST INCLUDE PICTURES OF THE
APPLIANCE(S) ASSESSED INCLUDING DUCT SYSTEMS**

WHEN HEATING AND/OR COOLING APPLIANCES ARE REPLACED, THE CLIENT MUST SURRENDER THE OLD UNIT(S) TO BE DISPOSED OF BY CONTACTOR ACCORDING TO APPLICABLE STATE AND FEDERAL LAWS. CONTRACTOR MUST REMOVE ALL HEATING AND/OR COOLING APPLIANCES FROM THE CLIENTS' HOME AND DESTROY BEYOND REPAIR.

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PAYMENT PROCEDURES AND GUIDELINES

THE COUNTY OF HIDALGO COMMUNITY SERVICE AGENCY REQUIRES COMPLIANCE TO THE FOLLOWING GUIDELINES AND PROCEDURES BEFORE PURCHASE ORDERS WILL BE ISSUED TO THE VENDOR:

- 1) No client shall be excluded from participation due to age, color, religion, sex, national origin, age, handicap, political affiliation or belief.
- 2) Must not accept any gifts, monetary or otherwise, from clients.
- 3) Will accept CHCSA purchase order as authorization and obligation of payment and only for the amount stated on the purchase order.
- 4) Will not alter the amount on purchase order without the prior approval from CHCSA.
- 5) Will be responsible for any damage occurring to central heating and/or cooling units after it is pickup from the proper vendor.
- 6) Will be responsible for any loss or theft occurring to the central heating and/or cooling units after it is picked up from the proper vendor.
- 7) Will test outlet for any potential electrical problem(s) that deem it unsafe and notify CHCSA of the problem.
- 8) Will install central heating and/or cooling systems in location determined by CHCSA.
- 9) Will submit CHCSA document(s) with client signature where required.
- 10) Will submit itemized billing of actual work performed with corresponding documentation. For audit purposes, billing must include:
 - A) Name and address of vendor
 - B) Name and signature of client
 - C) Date(s) work was performed
 - D) Detail description of work performed and associated cost
 - E) CHCSA purchase order number
 - F) Billing total amount

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- 11) Direct all purchase orders to include billings/invoices and complete assessment forms (including pictures) to County of Hidalgo Community Service Agency, P.O. Box 204 Edinburg, Texas 78540. The address has been provided on the purchase order.
- 12) Submittal of purchase orders will be at contractor's discretion, keeping in mind that work must be completed within 10 days as of date of purchase order.
- 13) Payment will be made to contractor approximately thirty (30) to sixty (60) days after receipt of purchase order at CHCSA office. Prompt payment will also depend on transaction of funds from the state level to CHCSA. Nevertheless, payment is guaranteed, CHCSA will not issue purchase orders unless it has a contractual amount to cover said amount.
- 14) CHCSA is a not-for-profit entity therefore is not subject to tax charges (tax-exempt status).
- 15) Completion of an IRS W-9 form is required in order to prevent the withholding of thirty-one percent (31%) of all payments.

Authorized Representative Signature

Date

Print Name of Authorized Representative

Title of Authorized Representative

Telephone number

Name of Contact Person

EXHIBIT "B"

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Scoring Criteria

Points will be given to each of the contractual considerations including financial resources & integrity, bidders technical knowledge, and price of materials and labor.

Scoring Breakdown

| | | | |
|-----|-------------------------------------|----|--------|
| I. | Financial Resources & Integrity | 30 | Points |
| II. | Technical Knowledge & Experience | 30 | Points |

Proposers with a minimum score of 30 points in each area above will be deemed qualified for evaluation of prices as submitted.

| | | | |
|-------|--------------------------|-----|--------|
| III. | Material and Labor Price | 40 | Points |
| <hr/> | | | |
| | Total Possible Points | 100 | Points |

After negotiations, the proposer with the lowest material and labor price will be awarded a maximum of 40 points. All other proposers will receive points based on the following formula:

$$\begin{array}{l} \text{Lowest proposal price} \quad \div \quad \text{proposal price} \quad \times 40 = \quad \text{points awarded} \\ \text{Example} \quad \$1000 \quad \div \quad \$1200 = .834 \quad \times 40 = \quad 33.36 \end{array}$$

Note: A contract will be awarded to the most qualified proposer(s) whose proposal, after negotiations, is most advantageous to CHCSA with price and other factors considered.

EXHIBIT "C"

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INTEGRITY & FINANCIAL RESOURCES

Proposer's Name: _____

I. INTEGRITY- Please list two references of persons or firms that you have conducted business with in the past 12 months who are familiar with your work.

*The following questions that will be asked when we contact the references.
2.5 points have been assigned to each question, only favorable responses will be receive points.
15 points maximum may be received.*

- Q.1. Do they honor their prices?*
- Q.2. To the best of your knowledge has this firm or person consistently conducted their business affairs in a manner to reflect sound business judgment?*
- Q.3. Would you characterize this vendor as honest, fair and responsible?*

Reference 1

Name: _____

Address: _____

Company: _____ Phone # _____

Corporate Phone # _____ Corporate Fax # _____

Reference 2

Name: _____

Address: _____

Company: _____ Phone # _____

Corporate Phone# _____ Corporate Fax # _____

EXHIBIT "C" con't

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INTEGRITY & FINANCIAL RESOURCES con't

Proposer's Name: _____

II. FINANCIAL RESOURCES- Please answer the following questions.

*2.5 points have been assigned to each question, only favorable responses will receive points.
15 points maximum may be received.*

A. Does your firm/company have the financial capabilities to provide materials up to a maximum of thirty (30) days before receiving payment?

YES NO

Please submit a copy of your firm's most recent (within the last 12 months) financial statement.

B. Will you hold material until we are ready to pick-up/install?

YES NO

C. Are you or have you been involved in a Chapter 13 bankruptcy proceeding?

YES NO

D. Are there any liens against your firm/company?

YES NO

E. Are there any lawsuits against your firm/company?

YES NO

F. Have any complaints been filed against your firm with the Better Business Bureau?

YES NO

If yes, describe the nature of the complaint and its resolution.

EXHIBIT "D"

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TECHNICAL KNOWLEDGE AND EXPERIENCE

Proposer's Name: _____

I. TECHNICAL KNOWLEDGE _List two work references of persons or firms for whom you have worked as a contractor to perform heating and cooling work such as:

- | | |
|--|---|
| Assessing heating and cooling systems including duct systems | Repair or installing duct systems |
| Installing central heating and cooling units | Repair of central heating and cooling systems |

The following questions will be asked when we contact the references. 2 points has been assigned to each question, only favorable response will receive points. 24 points maximum may be received.

- 1) *Is the quality of work of this firm or person satisfactory or poor? If satisfactory, specify in what way. If not satisfactory, specify in what way.*
- 2) *Has this firm or person been timely in completing projects?*
- 3) *Has this firm or person's crew operated, to the best of your knowledge, with good behavior at work sites?*
- 4) *If the occasion arose, would you subcontract again with this firm or person to do a job for you?*

Reference 1 Name: _____ Phone#: _____
 Address: _____
 Company: _____

Reference 2
Name: _____ Phone#: _____
Address: _____
Company: _____

Reference 3
Name: _____ Phone#: _____
Address: _____
Company: _____

EXHIBIT "D" con't

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TECHNICAL KNOWLEDGE AND EXPERIENCE con't

Proposer's Name: _____

**II. LENGTH OF EXPERIENCE - 1 point has been assigned for each year
5 points maximum may be received**

State the number of years you have done professional heating and cooling work or general contracting work. _____ years

III. GENERAL - 1 point maximum has been assigned

Are you a minority-owned or women-owned enterprise? _____

EXHIBIT "E"

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A. Labor for Central Heating and Cooling Systems

TECHNICAL SPECIFICATIONS

1. HVAC Assessment. HVAC assessments, if any, completed pursuant to this solicitation must be completed by a licensed HVAC professional. The assessment of existing heating/cooling appliances (including heating/cooling appliance efficiency and heating appliance safety) must be documented and submitted for agency review and approval. A HVAC assessment form (see example Appendix 1 to this solicitation) must be completed for each HVAC assessment conducted pursuant to this solicitation. Assessment must include photograph of appliances and ducts assessed.
2. Room by Room Heat Load Calculation (Manual J or similar (prior approval by CHCSA required) on a per case basis as requested by CHCSA.
3. **Any additional repairs, replacement, size changes must be authorized by CHCSA before contractor can proceed.**
4. No separate mileage charge is permitted, must be included in assessment fee.

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A1. Assessment

| Item | Labor | Quantity* | Grand Total |
|---|------------|-----------|-------------|
| 1. HVAC Assessment Fee/Service Call (Can only be charged if central system receives no services) | \$ _____ X | 125 | = \$ _____ |
| 2. Room by Room Heat Load Calculation (Manual J or equivalent) | \$ _____ X | 15 | = \$ _____ |

A2. Labor for Central Heating and Cooling Systems

| Appliance | Labor | Quantity* | Grand Total |
|---|------------|-----------|-------------|
| 3. Central Unit AC repair (Labor Only) | \$ _____ X | 5 | = \$ _____ |
| 4. Central Electric Furnace Repair (Labor Only) | \$ _____ X | 5 | = \$ _____ |
| 5. Central Gas Furnace Repair (Labor Only) | \$ _____ X | 5 | = \$ _____ |

***QUANTITIES ARE ESTIMATES ONLY, ANY ITEM MAY VARY IN QUANTITY**

| | | |
|---------------------|----------------------|----------------------|
| Total for Section A | Total Labor \$ _____ | Grand Total \$ _____ |
|---------------------|----------------------|----------------------|

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- B. Central Heating and Cooling Systems
- C. Complete Central Heating and Cooling Systems
- D. Cleaning of Central Heating and Cooling Systems

TECHNICAL SPECIFICATIONS

- A. Product information. Proposers shall submit with this proposal technical specifications for HVAC items. Proposer's submission must include warranty information, a 1-800 service number for the use of clients and/or agency staff and **documentation that the proposed product meets minimum efficiency requirements.**
- B. Product Installation-HVAC must be placed to city or local codes. Contractor will be responsible for delivery of the new unit, installation, removing old unit, and recapturing Freon according to code. Proper ventilation must be addressed for combustion units. Installation must include instructions to client as to operation, including lighting instruction, and demonstration. A carbon monoxide test must be conducted and results provided to the Agency for every gas unit installed pursuant to this solicitation.
- C. Equipment must be Energy Star Rated. Stand alone Gas furnaces must meet **AFUE rating of .80**
- D. **Any additional repairs, replacement, size changes must be authorized by CHCSA before contractor can proceed.**
- E. All Duct Repair/Replacement must have a minimum **R8** insulation rating.
- F. Price should include installation of new appliance, removal and disposal of original unit!
- G. Cleaning: Part to be cleaned must be removed, cleaned thoroughly and replaced.
- H. **HVAC Assessment/Service Call** can only be charged if central system receives no services.

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B. Central Heating and Cooling Systems
 Page 1

| Appliance | Materials | Labor | Total | Quantity* | Grand Total |
|------------------------|-----------|----------|-------|-----------|-------------|
| Compressor | | | | | |
| 1. Install 1.5 ton | \$ _____ | \$ _____ | _____ | X 5 | = \$ _____ |
| 2. Install 2 ton | \$ _____ | \$ _____ | _____ | X 5 | = \$ _____ |
| 3. Install 2.5 ton | \$ _____ | \$ _____ | _____ | X 5 | = \$ _____ |
| 4. Install 3 ton | \$ _____ | \$ _____ | _____ | X 5 | = \$ _____ |
| 5. Install 3.5 ton | \$ _____ | \$ _____ | _____ | X 5 | = \$ _____ |
| 6. Install 4 ton | \$ _____ | \$ _____ | _____ | X 5 | = \$ _____ |
| Condensing Unit | | | | | |
| 7. Install 1.5 ton | \$ _____ | \$ _____ | _____ | X 5 | = \$ _____ |
| 8. Install 2 ton | \$ _____ | \$ _____ | _____ | X 5 | = \$ _____ |
| 9. Install 2.5 ton | \$ _____ | \$ _____ | _____ | X 5 | = \$ _____ |
| 10. Install 3 ton | \$ _____ | \$ _____ | _____ | X 5 | = \$ _____ |
| 11. Install 3.5 ton | \$ _____ | \$ _____ | _____ | X 5 | = \$ _____ |
| 12. Install 4 ton | \$ _____ | \$ _____ | _____ | X 5 | = \$ _____ |

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B. Central Heating and Cooling Systems

Page 2

| Appliance | Materials | Labor | Total | Quantity* | Grand Total |
|-------------------------|-----------|----------|----------|-----------|-------------|
| Evaporative Coil | | | | | |
| 13. Install 1.5 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 14. Install 2 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 15. Install 2.5 on | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 16. Install 3 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 17. Install 3.5 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 18. Install 4 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| Air Handler | | | | | |
| <u>Closet Location</u> | | | | | |
| 19. Install 1.5 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 20. Install 2 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 21. Install 2.5 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 22. Install 3 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 23. Install 3.5 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 24. Install 4 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |

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B. Central Heating and Cooling Systems
 Page 3

| Appliance | Materials | Labor | Total | Quantity* | Grand Total |
|--|-----------|----------|----------|-----------|-------------|
| <u>Air Handler (con't)</u> | | | | | |
| <u>Attic Location</u> | | | | | |
| 25. Install 1.5 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 26. Install 2 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 27. Install 2.5 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 28. Install 3 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 29. Install 3.5 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 30. Install 4 ton | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| <u>Miscellaneous</u> | | | | | |
| 31. Install Digital heating/cooling thermostat (Energy Star Rated) | \$ _____ | \$ _____ | \$ _____ | X 10 | = \$ _____ |
| 32. Electrical Whip for Condenser | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 33. Drip pan for Central System | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 34. Install Condenser pad | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |

EXHIBIT "E" con't

COUNTY OF HIDALGO COMMUNITY SERVICE AGENCY
 Repairs, Replacement and/or Retrofit Central Heating and/or Cooling Systems
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B. Central Heating and Cooling Systems
 Page 4

| Appliance | Materials | Labor | Total | Quantity* | Grand Total |
|---|-----------|----------|----------|-----------|-------------|
| 35. Install return air grill and new filter | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 36. Install 1.5" duct board ducts (per sheet) | \$ _____ | \$ _____ | \$ _____ | X 10 | = \$ _____ |
| 37. Duct Repair (Labor Only) | | \$ _____ | \$ _____ | X 10 | = \$ _____ |
| 38. Mastic (per gallon) | \$ _____ | \$ _____ | \$ _____ | X 10 | = \$ _____ |
| 39. Metal Duct Tape (per roll) UL-181 2.5 " | \$ _____ | \$ _____ | \$ _____ | X 10 | = \$ _____ |
| 40. Increase the size of the return air | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |
| 41. Increase size of attic hatch | \$ _____ | \$ _____ | \$ _____ | X 5 | = \$ _____ |

***QUANTITIES ARE ESTIMATES ONLY, ANY ITEM MAY VARY IN QUANTITY**

| | | | | |
|---------------------|-------------------|----------------|----------------|----------------------|
| Total for Section B | Material \$ _____ | Labor \$ _____ | Total \$ _____ | Grand Total \$ _____ |
|---------------------|-------------------|----------------|----------------|----------------------|

EXHIBIT "E" con't

COUNTY OF HIDALGO COMMUNITY SERVICE AGENCY
Repairs, Replacement and/or Retrofit Central Heating and/or Cooling Systems
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C. Complete Central Heating and Cooling Systems

| Appliance | Materials | Labor | Total | Quantity* | Grand Total |
|-----------|-----------|-------|-------|-----------|-------------|
|-----------|-----------|-------|-------|-----------|-------------|

The following must include all material and labor to install a COMPLETE central system (duct work or replacement excluded)

All Electric Units

| | | | | | |
|----|---------------------------------------|----------|---|----|------------|
| 1. | Install 1.5 ton complete Central Unit | \$ _____ | X | 5 | = \$ _____ |
| 2. | Install 2 ton complete Central Unit | \$ _____ | X | 10 | = \$ _____ |
| 3. | Install 2.5 ton complete Central Unit | \$ _____ | X | 10 | = \$ _____ |
| 4. | Install 3 ton complete Central Unit | \$ _____ | X | 10 | = \$ _____ |
| 5. | Install 3.5 ton complete Central Unit | \$ _____ | X | 10 | = \$ _____ |
| 6. | Install 4 ton complete Central Unit | \$ _____ | X | 5 | = \$ _____ |

Electric/Gas Furnace unit

| | | | | | |
|-----|---------------------------------------|----------|---|---|------------|
| 7. | Install 1.5 ton complete Central Unit | \$ _____ | X | 5 | = \$ _____ |
| 8. | Install 2 ton complete Central Unit | \$ _____ | X | 5 | = \$ _____ |
| 9. | Install 2.5 ton complete Central Unit | \$ _____ | X | 5 | = \$ _____ |
| 10. | Install 3 ton complete Central Unit | \$ _____ | X | 5 | = \$ _____ |
| 11. | Install 3.5 ton complete Central Unit | \$ _____ | X | 5 | = \$ _____ |
| 12. | Install 4 ton complete Central Unit | \$ _____ | X | 5 | = \$ _____ |

***QUANTITIES ARE ESTIMATES ONLY, ANY ITEM MAY VARY IN QUANTITY**

| | | | | |
|---------------------|-------------------|----------------|----------------|----------------------|
| Total for Section D | Material \$ _____ | Labor \$ _____ | Total \$ _____ | Grand Total \$ _____ |
|---------------------|-------------------|----------------|----------------|----------------------|

EXHIBIT "E" con't

COUNTY OF HIDALGO COMMUNITY SERVICE AGENCY
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D. Cleaning of Central Heating and Cooling Systems

| Appliance | Material | Labor | Total | Quantity* | Grand Total |
|---------------------------------------|----------|----------|---------|-----------|-------------|
| <u>Evaporative Coil only</u> | | | | | |
| 1. Closet Location | | \$ _____ | X _____ | 15 | = \$ _____ |
| 2. Attic Location | | \$ _____ | X _____ | 15 | = \$ _____ |
| <u>3. Condensor Coil only</u> | | | | | |
| | | \$ _____ | X _____ | 15 | = \$ _____ |
| <u>Evaporative Coil and Condensor</u> | | | | | |
| 4. Closet Location | | \$ _____ | X _____ | 10 | = \$ _____ |
| 5. Attic Location | | \$ _____ | X _____ | 10 | = \$ _____ |
| <u>Air Return</u> | | | | | |
| 6.. Closet Location | | \$ _____ | X _____ | 10 | = \$ _____ |
| 7.. Attic Location | \$ _____ | | X _____ | 10 | = \$ _____ |

*QUANTITIES ARE ESTIMATES ONLY, ANY ITEM MAY VARY IN QUANTITY

| | | | |
|---------------------|----------------|----------------|----------------------|
| Total for Section E | Labor \$ _____ | Total \$ _____ | Grand Total \$ _____ |
|---------------------|----------------|----------------|----------------------|

EXHIBIT "E" con't

COUNTY OF COMMUNITY SERVICE AGENCY
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PROPOSAL SHEET TOTALS

Please place the totals from the previous sections in the spaces provided below.

| | |
|--|---|
| Assessment (Service Call)/Labor Item #1-5 | Section A Grand Total \$ _____ |
| Central Heating & Cooling Systems Item #1-41 | Section B Grand Total \$ _____ |
| Complete Central Heating & Cooling Units Item # 1-12 | Section C Grand Total \$ _____ |
| Cleaning of Central Heating & Cooling Units Item #1-7 | Section D Grand Total \$ _____ |
| Total Price | Section A-D Grand Total \$ _____ |

These prices are quoted for all the following counties in our service area.

Contractor Signature: _____ Date: _____

EXHIBIT "F"

COUNTY OF COMMUNITY SERVICE AGENCY
Repairs, Replacement and/or Retrofit Central Heating and/or Cooling Systems
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CERTIFICATION

| | |
|---|--|
| Contractor and Company Name: Other Company Names or DBA's | |
| SSN or Employer's Federal ID Number | |
| Mailing Address: | |
| Telephone: e-mail | |
| FAX: | |

I understand that Contractors and subcontractors must not be debarred, suspended, or ineligible according to the US General Services Administration's List of Parties Excluded from Federal Procurement or Non Procurement Programs.

I understand that I must carry adequate general liability and worker's compensation insurance. This insurance must be applicable to work done in **Hidalgo** County and must be in effect during the entirety of the contract period. Evidence of such insurance must be presented prior to the execution of the contract.

I understand that all work must be completed according to the Texas Department of Housing and Community Affairs and CHCSA's guidelines and conform to all applicable codes and general specifications.

I certify that I am not a board member, officer, employee or former employee or agent of CHCSA nor am I a family member, spouse of a board member, officer, employee or agent of CHCSA.

I have been provided a copy of the heating and cooling Procurement for Proposal package, reviewed the documents, and certify that all work completed will meet or exceed these standards and specifications.

I understand that I cannot alter any work without authorization from CHCSA.

I agree to provide CHCSA a sixty (60) day no interest charge for payment. Payments are made as individual units are totally completed and complete documentation is submitted.

I agree to provide proposed services without frequent delays.

EXHIBIT "F" con't

COUNTY OF COMMUNITY SERVICE AGENCY
Repairs, Replacement and/or Retrofit Central Heating and/or Cooling Systems
Proposal No. 2010-156-05-05-otm

CERTIFICATION con't

I understand that I must provide a one-year warranty on all work and that failure to complete warranty work may result in debarment from future heating and cooling contracts.

I understand that I must complete all work within the time period specified in the contract.

I will abide by the Texas Department of Housing and Community Affairs regulations pertaining to equal employment opportunity.

I understand that selected contractor(s) may be required to undergo background and credit verification prior to execution of contract.

I understand that CHCSA reserves the right to reject any and all Procurement for Proposals.

No member, officer, agency or employees of CHCSA shall be personally liable concerning any matters arising out of or in relation to the commitment heating and cooling funds with regards to feasibility or validity of the proposed subject.

I hereby certify that prices quoted in Exhibit E shall be the delivered price at any work site within the stated service delivery area (Hidalgo County) and shall include all packaging, handling shipping and delivery charges. I understand that County of Hidalgo Community Service Agency is exempt from state and local taxes and have therefore not included taxes in the pricing provided herein. I acknowledge that these prices must remain in effect throughout the original contract period. I further certify that the quoted materials meet the specifications contained in this quotation document and have provided, with this proposal, proof of same.

Contractor's Name (please print)

Contractor's Signature

Date

EXHIBIT "G"

COUNTY OF COMMUNITY SERVICE AGENCY
 Repairs, Replacement and/or Retrofit Central Heating and/or Cooling Systems
 Proposal No. 2010-156-05-05-otm

Selection Criteria For Proposers To Be Utilized

Proposals will be evaluated on the following factors:

- Integrity and Financial Resources
- Technical Knowledge and Experience
- Price

SCORE SHEET

| | | <u>Possible Points</u> | <u>Earned Points</u> |
|----------------------|---------------------------------------|----------------------------|--------------------------|
| 1). | Exhibit "C"-(Maximum Score 30 Pts) | | |
| | Integrity | 15 | _____ |
| | Financial Resources | 15 | _____ |
| 2). | Exhibit "D"-(Maximum Score 30 Pts) | | |
| | Technical Knowledge | 24 | _____ |
| | Length of Experience | 5 | _____ |
| | General | 1 | _____ |
| 3). | Exhibit "E"-(Maximum Score of 40 Pts) | | |
| | Price | 40 | _____ |
| TOTAL POINTS | | | |
| (100 points maximum) | | | _____ |

Note: A contract will be awarded to the most qualified proposer whose proposal, after negotiations is most advantageous to CHCSA with price and other factors considered.

Evaluator Name: _____

EXHIBIT "H"

COUNTY OF COMMUNITY SERVICE AGENCY
Repairs, Replacement and/or Retrofit Central Heating and/or Cooling Systems
Proposal No. 2010-156-05-05-otm

EVALUATION SHEET

Proposer's Name _____

Exhibit "C"-Integrity and Financial Resources

Integrity-2.5 points per question per reference/15 points maximum

Reference #1

Q.1 _____

Q.2 _____

Q.3 _____

Reference #2

Q.1 _____

Q.2 _____

Q.3 _____

Financial Resources-2.5 points per positive response/15 points maximum

A _____

B _____

C _____

D _____

E _____

F _____

Exhibit "D"- Technical Knowledge and Experience

Technical Knowledge-2 points per questions per reference/24 points maximum

Reference #1

Q.1 _____

Q.2 _____

Q.3 _____

Q.4 _____

Reference #2

Q.1 _____

Q.2 _____

Q.3 _____

Q.4 _____

Reference #3

Q.1 _____

Q.2 _____

Q.3 _____

Q.4 _____

Length of Experience-1 point per year/5 points maximum

_____ years = _____ points

General-1 point maximum

____ Yes=1 point

____ No=0 point

Exhibit "E"- Material and Labor Prices

POINTS EARNED _____

_____ Lowest Price (after negotiations)

POSSIBLE POINTS _____ 100 _____

POINTS EARNED _____

EVALUATOR NAME: _____