

#### Statement of Qualification (SOQ)

Contractor must provide a Statement of Qualification of the company profile and include the items listed below.

Provide a narrative response to each item that demonstrates your understanding of the Scope of Work requirements and describes your company's experience, qualifications, methodology and approach to providing the services stated in this solicitation. Responses should be specific to this solicitation.

#### Criteria I – Years of Experience & Staff Capacity

- A. Proof of authority to transact business, or in good standing, in the state of Arizona by the Arizona Corporation Commission (ACC). ACC print-out or screen grab must be provided.
- B. Describe the organization's years of experience, outlining a minimum of two
  (2) years, conducting business within the Phoenix Metropolitan Area.
- C. A brief narrative of the company profile and quality assurance practices.
- D. Describe the organization's years of experience providing the services listed in the Scope of Work for a minimum of two (2) years.
- C. Outline the organization's staffing structure. Describe how you will ensure the scope of services are provided effectively and efficiently. Include resumes for key staff who will be performing services under the contract.
  - 1. Outline staff who are accredited and hold current BA-T and/or BA-P (or other Arizona Department of Housing [ADOH]) required weatherization training.
  - 2. Outline staff who are accredited and certified as Energy Auditors and maintain QCI Certifications from the BPI.
  - 3. Outline staff processes and how home inspections are conducted to properly evaluate homes.

#### Criteria II – Warranty Procedure

A. Outline your process for responding to a warranty repair request and how warranty repairs will be handled.



All prices include all costs for delivery and installation as defined in the Scope of Work, considering the requirements of the Arizona Weatherization Program.

Pricing must be all inclusive, and include permit fees (if applicable), labor, tax and materials to complete a project.

All materials used must meet or exceed 10 CFR 440 Appendix A: "Standards for Weatherization Services."

For HVAC items:

 All Contractor bid amounts for installation of package units to include new elbow or roof curb, t-stat and stand, disconnect and fuses, breaker and condensate drain. All installs of gas split systems are to include, t-stat, disconnect, fuses, breaker EVAP drain pan, flue system and gas line. All tie–ins to ductwork to be sealed with a U.L approved duct mastic.

For Mobile Home insulation:

• All Contractor bid amounts will include the prep-work necessary to verify or create the appropriate air barriers.

Complete and submit the following Pricing Proposal spreadsheet as part of your submittals. Submittals may be for ANY and ALL items.

If required in Section 3, Scope of Work – please provide the manufacturer and product number.



# Appliances (Refrigerators)

Item	Manufacturer & Product No.	Unit Price
15/16 cu. ft		\$
18 cu. ft		\$
21 cu. ft		\$
25/26 cu. ft - side by side		\$
25 cu. ft -		
bottom freezer		\$



#### Ranges

Item No.	Manufacturer & Product No.	Unit Price
30" Gas Range		\$
Gas Cooktop		\$
Electric Cooktop - Smooth		\$
30" Electric Range - Smooth Top		\$
Electric Wall Oven - Double		\$
Electric Wall Oven - Single		\$
Electric Range - Cord Kit		\$
Gas Range - Flex Kit & Shut- Off Valve		\$
Above Range Microwave Oven		\$
Microwave Oven		\$
Electric Wall Oven with Microwave		
Above		\$



# Washers/Dryers

Item No.	Manufacturer & Product No.	<b>Unit Price</b>
Top Load Washer		\$
Electric Dryer		\$
Gas Dryer		\$
Electric Stackable Washer/Dryer		\$
Cord Kit - Dryer		\$
Flex Kit - Gas Dryer		\$
Kit - Stackable Washer/Dryer		\$
Delivery, Installation, and Recycle Charge		\$
Special Installation/Modification Charge		\$



# **Duct Sealing**

Charge For Manual D Duct Sealing		Unit Price
Properly seal entire duct system from start to termination, including boot do drywall and all accessible connections.	Includes seal plenum/elbow and transition/cap end of trunk	\$
Seal platform/cavity return with duct board and mastic		\$

Seal Mobile Home Duct - Complete		Unit Price
Single Trunk	Includes capping ends of trunk	\$
Double Trunk	Includes capping ends of trunk	\$

Pressure Relief	Unit Price
One-bedroom Jumper	\$
Each Additional Room (Jumper)	\$
Pass Through Vents (2) in Wall Per Room (20X10 Recommend) - Bar Faced Style	\$



Flex Return per drop (price includes can, collar bar faced filter grill, duct return and sealing at both ends)		
Unit Price		
14"		\$
16"		\$
18"		\$
20"		\$

New Flex Supply Drop Per Drop (price includes can, collar, bar faced grill, duct return and sealing at both ends)		
		Unit Price
6"		\$
8"		\$
10"		\$
12"		\$
14"		\$

Replace existing	flex run (includes sealing at both ends)	
		Unit Price
6"		\$
8"		\$
10"		\$
12"		\$
14"		\$
16"		\$
18"		\$
20"		\$

Register Replacements (all registers to be bar faced, excepting Mobile Home floor registers). Price includes boot to drywall or floor sealing. Item Unit Price		
Floor Registers		
(10"X4")		\$
12x12 Supply Grill		\$
14x14 Supply Grill		\$
20x20 Return Grill		\$



20x25 Return Grill	\$
20x30 Return Grill	\$
20x40 Return Grill	\$

Mobile Home Fle	x Additional Cost	
Item		Unit Price
New Sealed & Insulated mixing		
(PBX Box)		\$
Remove Evap		
and Ductwork,		
cap and seal		\$
Modify Attic		
hatch to		
accommodate		
air handler		\$



# Envelope Sealing

Glass Replacement		Unit Price
Glazing window replacement (price per square foot)		\$
	Drywall Replacement	Sq. Ft. Cost
Drywall replacement (price per square foot)		\$

	Duct Board Installation	Sq. Ft. Cost
Duct board		
installation		
(price per		
square foot)		\$
Duct board		
repairs (price		
per square		
foot/not to		
exceed)		\$



## HVAC

Item No.	Manufacturer & Product No.	Unit Price	
	Removal of forced air furnace in closet and evaporative cooler on roof and		
existing furnace, o	replace with new 14-SEER Gas Pac unit on roof. Price should include sealing existing furnace, capping gas or electric and running new gas and electrical		
lines to roof for the	e following sizes:		
2.0 Ton		\$	
2.5 Ton		\$	
3.0 Ton		\$	
3.5 Ton		\$	
4.0 Ton		\$	
5.0 Ton		\$	
Furnace Only			
Installed		\$	

Item No.	Manufacturer & Product No.	<b>Unit Price</b>
Removal of existir	ng system and replace with new 14-SEER p	backage heat
pump		
2.0 Ton		\$
2.5 Ton		\$
3.0 Ton		\$
3.5 Ton		\$
4.0 Ton		\$
5.0 Ton		\$

Item No.	Manufacturer & Product No.	Unit Price
Removal of existing	ng system and replace with new 14-SEER s	olit system heat
pump		
2.0 Ton		\$
2.5 Ton		\$
3.0 Ton		\$
3.5 Ton		\$
4.0 Ton		\$
5.0 Ton		\$

Item No.	Manufacturer & Product No.	Unit Price
Removal of existir pump Mobile Hom	ng system and replace with new 14-SEER spl ne (AHRI N/A)	it system heat
2.0 Ton		\$



2.5 Ton	\$
3.0 Ton	\$
3.5 Ton	\$
4.0 Ton	\$
5.0 Ton	\$

Item No.	Manufacturer & Product No.	Unit Price
Removal of existing system and replace with new 14-SEER split system A/C with gas furnace		
2.0 Ton		\$
2.5 Ton		\$
3.0 Ton		\$
3.5 Ton		\$
4.0 Ton		\$
5.0 Ton		\$

Item No.	Manufacturer & Product No.	Unit Price
Removal of existing system and replace with new 14-SEER split A/C with Mobile Home style gas furnace sealed combustion unit		
2.0 Ton		\$
2.5 Ton		\$
3.0 Ton		\$
3.5 Ton		\$
4.0 Ton		\$
5.0 Ton		\$

Item No.	Manufacturer & Product No.	Unit Price
Removal of existing	ng and replace with 14-SEER Gas Pac	
2.0 Ton		\$
2.5 Ton		\$
3.0 Ton		\$
3.5 Ton		\$
4.0 Ton		\$
5.0 Ton		\$

Item	<b>Unit Price</b>
Crane Charge	
(price per job)	\$



Manual J Fee (price per job)		\$
Diagnostic Fee	Charge to diagnose system and provide detailed estimate for repair or replacement	\$
Install new Line Set		\$
Install new electrical run to unit		\$

Repairs	Unit Price
Clean	
evaporative coil	\$
Clean	
condenser coil	\$
Replace blower	
motor and	
capacitor	\$
Replace condenser	
motor and	
capacitor	\$
Replace	- <del>T</del>
capacitor -	
Single	 \$
Replace	
capacitor - Dual	\$
Replace	•
Thermostat	\$
Replace contactor	¢
	\$
Replace relay Replace circuit	\$
board	\$
Replace 3 Ton	Ŷ
compressor	\$
Install hard start	
kit	\$
Repair leak	
(includes	
recovery and	<b>*</b>
charge)	\$



Replace fuses	\$
Replace 40-amp breaker	\$
Replace disconnect	\$
Replace gas valve	\$
Replace gas flex line	\$
Clean/tune furnace, adjust burners	\$
New condenser pad	\$
Install condensate drain	\$
Install upper and lower combustion air	\$
Replace TXV valve (refrigerant not included)	\$
Install liquid line dryer	\$
R-22 (price per pound)	\$
R-410a (price per pound)	\$
Remove and replace Evaporative Cooler (small)	\$
Remove and replace Evaporative Cooler (large)	\$



## Insulation/Air Barrier

Attics: Cellulose	Sq. Ft. Cost
Install 6" cap	\$
Install 9" cap	\$
Install 12" cap	\$

Attics: Fiberglass	Sq. Ft. Cost
Install 5" cap	\$
Install 11" cap	\$
Install 13" cap	\$

Kneewall	Sq. Ft. Cost
Install new fiberglass batts	\$
Re-align existing fiberglass batts	\$
Re-align fiberglass to attic floor	\$
Remove insulation from attic to allow for proper insulation	\$

Item		Unit Cost
Install baffles for		
bird blocking	Price per Truss	\$
Install air barrier (per square foot installed using duct board or WAP approved equal)		\$
Install attic		
access gasket,		
dam, and		<b></b>
insulate		\$



1	1	
Dense Pack Wall Cavity		\$
Dense Pack Floor Cavity		\$
Fill soffits with insulation		\$
Fill abandoned duct trunk with insulation		\$
Wrap Duct in insulation		\$
Cap up ducts		\$
secure wiring connections (enclose in box) Install dormer vent or whirly		\$
bird		\$
Under cut doors		\$
Install cap sheets for can lights		\$
Cut in new attic hatch on ceiling		\$
Replace existing attic hatch		\$
Hourly charge for estimator, clean out old insulation		\$
Trip Charge		\$ \$



# Manufactured Housing Insulation

Belly	Sq. Ft. Cost
Bring R-0 to R-	
15	\$
Bring R-5 to R-	
15	\$
Bring R-0 to R-	
25	\$
Bring R-9 to R-	
25	\$
Ceiling repair	
patch holes and	
prep ceiling for	
insulation	\$

Belly Repair	Sq. Ft. Cost
Belly patching and sealing per 100 sq. ft	\$
Floor penetration sealing	\$

Miscellaneous Manufactured Housing Insulation	Unit cost
Button Vents	\$
Homes less than 1,000 square feet - additional charge	\$

## **Solar Screens**

Solar Screens	Sq. Ft. Cost
Price per square	
foot	\$



## Ventilation

Item	Unit Price
Install new 30 to 80 cfm	\$
Install new 50 to 130 cfm	\$
New electrical	\$
New insulated ducting to outside	\$
Clean and seal existing exhaust fan	\$
Clean out dryer duct to ensure no blockage	\$
Duct dryer to outside, including termination box with working flapper	\$
Duct existing exhaust fan to outside	\$
Install ducted kitchen exhaust fan/range hood (attached to existing duct to outside)	\$
Install ducted bathroom exhaust fan (attached to existing duct to outside)	\$



## Water Heaters

Item No.	Manufacturer & Product No.	Unit Price
Gas - 30 Gallon		\$
Gas - 40 Gallon		\$
Gas - 50 Gallon		\$
Gas - Tankless Water Heater		\$
Electric - 30 gallon		\$
Electric - 40 gallon		\$
Electric - 50 gallon		\$
Manufactured Home - Gas - 30 gallon		\$
Manufactured Home - Gas - 40 gallon		\$
Manufactured Home - Electric - 30 gallon		\$
Manufactured Home - Electric - 40 gallon		\$
Heat Pump (Complete) - 50 gallon		\$
Sealed Combustion - 40 gallon		\$
Upper and lower combustion air		\$
T&P Drain		\$
Install exterior shed on pad		\$
Flue system with appropriate		
collars		\$



Gas flex line and shutoff valve	\$
Water supply lines and ball valve	\$
Rebuild floor for water heater placement	\$
Replace mobile home poly pipe (price per foot)	\$
Insulate Water Heater cloaset (price per square foot)	\$
Water heater stand	\$
Pedestal repair	\$
New drain	 \$
Run new 1/2- inch gas line (price per foot)	\$
1/2-inch copper (price per foot)	\$
3/4-inch copper (price per foot)	\$
1/2-inch PEX (price per foot)	\$
3/4-inch PEX (price per foot)	\$
Electrical whip	\$



# Miscellaneous Low Cost and General Repair

Item No.	Manufacturer & Product No.	Unit Price
Smoke Detector		
(battery		
powered)		\$
Carbon		
Monoxide		
(battery		
powered)		\$
Smoke		
Detector/Carbon		
Monoxide		
combo alarm		
(battery		¢
powered)		\$
Install LED Bulb		\$
Air Filters (1		
case of 20x30		
air filters)		\$
Install weather-		
strip (price per		
door)		\$
Ínstall door		
sweep (price per door)		\$
Paint A/C elbow		Ψ
with white		
elastomeric		
paint		\$
Pest Control		\$



#### Labor Rates

Item No.		Unit Price
General Labor Rate (price per hour)		\$
Plumbing Labor Rate (price per hour)		\$
Single Family Home Energy Audit	Pre/post duct sealing and test out after all work completed. Each estimate will have a total of 3.	\$
Quality Control Inspection		\$
Lead Home Management Fee	To include record keeping, checklist, photos of containment, work in progress, and clean up. Signed off by Certified Renovator.	\$
URRD Only	Completion form and photos. Time and travel.	\$
Walkaway	No tests, no audit, photos only.	\$





#### **CONTRACTOR INFORMATION**

(please complete and return with the submittal)

Company Name	
Street/Mailing Address	
City, State, Zip Code	
Contact Person	
Telephone Number	
Email Address	
Arizona Sales Tax No.	
City of Phoenix Sales Tax No.	
Arizona Corporation Commission File No.	
City's Vendor Registration ID No.	

## ATTACHMENT D



#### OFFER

(please complete, sign, and return with the submittal)

**TO THE CITY OF PHOENIX** - The Undersigned hereby offers and agrees to furnish the material and or service(s) in compliance with all terms, conditions, specifications, and addenda issued as a result of a solicitation.

Arizona Sales Tax No. Use Tax License No. for Out-of-State Arizona Corporation Commission File No.

Taxpayer's Federal Identification No.: If recommended for contract award, Offeror agrees to provide its federal taxpayer identification number or as applicable its social security number to the City of Phoenix for the purposes of reporting to appropriate taxing authorities, monies paid by the City of Phoenix under the awarded contract. If the Offeror provides its social security number, the City will only share this number with appropriate state and federal officials. This submission is mandatory under 26 U.S.C. § 6041A.

Enter City's Registration System ID Number	
Located at City's eProcurement website (see SECTION 2	
– INSTRUCTIONS - CITY'S REGISTRATION)	

Offeror has read, understands, and will fully and faithfully comply with this solicitation, its attachments and any referenced documents. Offeror certifies that the prices offered were independently developed without consultation with any other Offeror or potential Offerors.

Authorized	Signature
/ (011011200	orginataro

Date

Print Name and Title (President, Manager, Member) Offeror Legal Name and Company Type (*LLC, Inc., Sole Proprietor*)

Street Address: City, State, Zip Code: Telephone Number: Email Address:





#### **EMERGENCY 24-HOUR SERVICE CONTACT**

(please complete and return with the submittal)

Contact Name:	 	
Telephone Number:	 	
Alternate Contact:		
Telephone Number:	 	



#### CONFLICT OF INTEREST AND TRANSPARENCY FORM

(please complete, sign, and return with the submittal)

This form must be signed and submitted to the City and all questions must be answered (or N/A) or your Offer may be considered non-responsive.			
1	1 Nome of person submitting this disclosure form		
1.	Name of person submitting this disclosure form.		
	irst MI Last Suffix		
2.	Contract Information		
	Dicitation # or Name:		
3.	Name of individual(s) or entity(ies) seeking a contract with the City (i.e. parties to the Contract)		
4.	List any individuals(s) or entity(ies) that are owners, partners, parent, sublessees, joint venture, or subsidiaries of the individual or entity listed in Question 3. Please include all Board members, or subsidiaries of the individual or entity listed in Question 3. Please include all Board members,		
	executive committee members and officers for each entry. If not applicable, indicate N/A.		
5.	List any individuals or entities that will be subcontractors on this contract or indicate N/A.		
	<ul> <li>Subcontractors may be retained, but not known as of the time of this submission.</li> <li>List of subcontracts, including the name of the owner(s) and business name:</li> </ul>		
6.	List any attorney, lobbyist, or consultant retained by any individuals listed in Questions 3, 4, or 5 to assist in the proposal or seeking the resulting contract. If none, indicate N/A.		



#### 7. Disclosure of Conflict of Interest:

#### A. City Code Section 43-34

Are you aware of any fact(s) with regard to this solicitation or resulting contract that would raise a "conflict of interest" issue under City Code Section 43-34?

"An elected City official or a City employee shall not represent any person or business for compensation before the City regarding any part of a procurement, including any resulting contract, if during the time the elected official is or was in office or the employee is or was employed by the City such elected official or employee played a material or significant role in the development of the solicitation, any other part of the procurement, or the contract award."

- □ I am not aware of any conflict(s) of interest under City Code Section 43-34.
- □ I am aware of the following potential or actual conflict(s) of interest:

#### B. ARS Sections 38-501 et. Seq. & City Charter Chapter 11

State law and the Phoenix City Charter and Code prohibit public officers or employees, their close relatives, and any businesses they, or their relatives, own from (1) representing before the City any person or business for compensation, (2) doing business with the City by any means other than through a formal procurement, and (3) doing business with the City without disclosing that the person has an interest in the contract. This prohibition extends to subcontracts on City contracts and also applies to parent, subsidiary, or partner businesses owned by a public officer or employee. See A.R.S. Sections 38-501 through 38-511, for more information (City Charter, Chapter 11, applies the state conflict-of-interest law to City employees).

Please note that any contract in place at the time a person becomes a public officer or employee may remain in effect. But the contract may not be amended, extended, modified, or changed in any manner during the officer's or employee's city service without following city administrative regulations.

Are you aware of any fact(s) with regard to this contract that would raise a "conflict of interest" issue under A.R.S. Sections 38-501 through 38-511 (See Arizona Revised Statutes regarding conflict of interest at <u>www.azleg.gov</u>).

- I am not aware of any conflict(s) of interest under Arizona Revised Statutes Sections 38-501 through 38-511.
- □ I am aware of the following conflict(s) of interest:



#### 8. Acknowledgements

#### A.Solicitation Transparency Policy – No Contact with City Officials or Staff During Evaluation

□ I understand that a person or entity who seeks or applies for a city contract, or any other person acting on behalf of that person or entity, is prohibited from contacting city officials and employees regarding the contract after a solicitation has been posted.

This "no-contact" provision only concludes when the contract is awarded at a City Council meeting. If contact is required with City official or employees, the contact will take place in accordance with procedures by the City. Violation of this prohibited contacts provision, set out in City Code Sections 2-190.4 and 43-36, by respondents, or their agents, will lead to disqualification.

#### **B.Fraud Prevention and Reporting Policy**

□ I acknowledge that the City has a fraud prevention and reporting policy and takes fraud seriously. I will report fraud, suspicion of fraud, or any other inappropriate action to: telephone no. 602-261-8999 or 602-534-5500 (TDD); or <u>aud.integrity.line@phoenix.gov</u>.

The purpose of the fraud policy is to maintain the City's high ethical standards. The policy includes a way for our business partners to report wrongdoing or bad behavior. Suspected fraud should be reported immediately to the Phoenix Integrity Line. The City has adopted a zero-tolerance policy regarding fraud.

#### OATH

I affirm that the statements contained in this form, including any attachments, to the best of my knowledge and belief are true, correct, and complete.

Should any of the answers to the above questions change during the course of the contract, particularly as it relates to any changes in ownership, applicant agrees to update this form with the new information within 30 days of such changes. Failure to do so may be deemed a breach of contract.

PRINT NAME

TITLE

DATE

SIGNATURE

COMPANY (CORPORATION, LLC, ETC.) NAME and DBA



#### CONTRACTOR LICENSING REQUIREMENTS

(please complete and return with the submittal)

Offeror shall comply with all statutes and rules of the State of Arizona and the Registrar of Contractors. In accordance with A.R.S. § 32-1151, and unless otherwise exempted by A.R.S. § 32-1121, Offeror shall have the correct class of license as required by the Registrar of Contractors for the work specified, at the time of offer submission.

Offeror certifies possession of the following license:

Licensed Contractor's Name	
Class	
License Number.	
Expiration Date	



#### COSTS AND PAYMENTS

(please complete and return with the submittal)

PAYMENT TERMS & OPTIONS: Vendors must choose an option, if a box is not checked, the City **will default to 0% - net 45 days:** 

Contractor offers a prompt payment discount of either \_\_\_\_\_% - 30 days or 0% - 45 days - to apply after receipt of invoice or final acceptance of the products (invoice approval), whichever date is later, starts the 30 days. If no prompt payment discount is offered, the default is 0%, net 45 days; effective after receipt of invoice or final acceptance of the products, whichever is later. **Payment terms offering a discount will not be considered in the price evaluation of your offer.** 

\_\_\_\_\_ Contractor may be paid immediately upon invoice approval, if enrollment is made to the Single Use Account (SUA) Program, administered by the City's servicing bank ("Bank"). By checking this box, the vendor accepts transaction costs charged by their merchant bank and agrees not to transfer to the City those extra charges. The City will not pay an increase in our services for the SUA charges; if an audit uncovers an upcharge for the SUA charges the vendor will owe the City all costs. The vendor may opt-out of the SUA program once, but then may not rejoin during the same contract term. For more information about the SUA program or to enroll, send email to mailbox.sua@phoenix.gov.



#### CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER INELIGIBILITY AND VOLUNTARY EXCLUSION

(please sign and return with the submittal)

The prospective participant (Contractor for a federally funded project) certifies, by submission of this solicitation and certification, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency. Where the prospective participant is unable to certify to any of the statements in this certification, such participant shall attach an explanation to this solicitation.

THE PARTICIPANT (Contractor for a federally funded project), CERTIFIES OR AFFIRMS THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTANDS THAT THE PROVISIONS OF 31 U.S.C. 3801 ET SEQ. ARE APPLICABLE THERETO.

Authorized Official Name	Signature
Title of Authorized Official	Date





#### YEARS IN BUSINESS AND REFERENCES

(please complete and return with the submittal)

Contractor shall furnish the names, addresses, and telephone numbers of a minimum of three firms or government organizations for which the Contractor is currently furnishing or has furnished, the goods or services.

Name of Company:	
Name of Contact:	
Email Address:	
Phone Number:	
Name of Company:	
Name of Contact:	
Email Address:	
Phone Number:	
Name of Company:	
Name of Contact:	
Email Address:	
Phone Number:	