



REQUEST FOR PROPOSALS

Weatherization Assistance Program

Piedmont Triad Regional Council (PTRC) is accepting subcontractors' proposals for a home energy improvement project under the North Carolina Energy Division's Weatherization Assistance Program. The program is administered through the NC Department of Environmental Quality (DEQ). The contract requires the weatherization of homes in **Alamance, Caswell, Davidson, Forsyth, Guilford, Randolph and Rockingham** counties, during the period of **July 1, 2025 through June 30, 2026**. During the course of this project, subcontractors are required to perform energy saving measures in customers' homes.

PTRC is requesting proposals from interested parties who are properly licensed contractors in the State of North Carolina in the following individual trades:

HVAC

Beginning on **Monday April 14, 2025** proposal packages will be available online at www.ptrc.org/weatherization or for pickup at Piedmont Triad Regional Council, 1398 Carrollton Crossing Drive, Kernersville, NC, 27284.

Proposals will be accepted at 1398 Carrollton Crossing Drive, Kernersville, NC, 27284 or may be mailed to:

**Piedmont Triad Regional Council
Attn: Nikia Beal
1398 Carrollton Crossing Drive
Kernersville, NC 27284**

Contractors submitting proposals must include in the proposal package: contractor information sheet, a copy of the business license, trade certification and training, and proof of Worker's Compensation, General Liability, Automobile, and Pollution Occurrence Insurances. **FAXED PROPOSALS WILL NOT BE ACCEPTED.**

Contractors will be notified of proposal award upon final approval from the NC Department of Environmental Quality (DEQ).

MINORITY, WOMEN AND DISABLED-OWNED BUSINESSES ARE ENCOURAGED TO PARTICIPATE IN THE PROPOSAL PROCESS.

1. INTRODUCTION AND PURPOSE:

- i. **PURPOSE OF THE REQUEST FOR PROPOSALS:** The purpose of this document is to provide interested parties with information to enable them to prepare and submit a proposal for Weatherization Services.

Piedmont Triad Regional Council (PTRC), working in conjunction with the NC Department of Environmental Quality (DEQ) intends to use the results of this process to award a contract for Weatherization Services.

REASONABLE ACCOMMODATION: PTRC will provide reasonable accommodations, including the provision of informational material in an alternative format, for qualified individuals with disabilities upon request. If you think you need accommodations at a proposal opening/vendor conference, contact the PTRC representative.

- ii. **SCOPE:** PTRC intends to utilize this proposal for all purchases for one year; however, PTRC may bid out single jobs on an as-needed basis when deemed in the best interest of PTRC and the State.
- iii. **OVERVIEW OF PROCURING AGENCY:** PTRC performs local administrative and executive functions for the Weatherization Assistance Program in the following counties: **Alamance, Caswell, Davidson, Forsyth, Guilford, Randolph, and Rockingham.**
- iv. **CONTRACT LENGTH:** The contract will be for a one-year period, July 1, 2025 through June 30, 2026.
- v. **METHOD OF AWARD:** The award will be given to the contractor(s) whose proposal(s) are the most responsive to the solicitation, and is the most advantageous to PTRC, considering price, quality, and other applicable factors including but not limited to experience, service record of the vendor, and required education/training/credentials of the vendor. Multiple contractors will be used to complete the contract. Any and all proposals may be rejected when it is in the agency's best interest to do so. **The lowest proposal will not always be accepted.**
- vi. **CANCELLATION and TERMINATION:** PTRC reserves the right to cancel the resulting contract/agreement, for any reason, by giving written notice to Contractor of such cancellation and specifying the effective date thereof, at least ten {10} days before the effective date of such cancellation. Contractor shall, in the event of cancellation, be entitled to receive compensation for any work accepted hereunder in accordance with the Agency's order(s). Contractor may also be compensated for partially completed work in the event of such cancellation. The compensation for such partially completed work shall be no more than the percentage of completion of each work effort, as determined at the sole discretion of PTRC, times the corresponding payment for completion of such work as set forth in the Agency's order(s).

2. PROPOSAL PROCEDURES AND INSTRUCTIONS:

- i. **PRE-BID CONFERENCE:** A Pre-Bid Conference will be held at Piedmont Triad Regional Council, 1398 Carrollton Crossing Drive Kernersville, NC 27284, 1st Floor Conference Room at **10:00 am on Friday May 2, 2025**. **All potential subcontractors are required to attend the Pre-Bid Conference**. Contractors are encouraged to confirm their attendance to the Pre-Bid Conference by contacting Nikia Beal at nbeal@ptrc.org or by calling 336-904-0300.
- ii. **QUESTION AND ANSWER PERIOD:** Questions regarding the RFP will be accepted beginning **Monday May 12, 2025 until Friday May 16, 2025**. All questions must be submitted in writing to Nikia Beal nbeal@ptrc.org. All questions will be answered in writing, and an addendum issued and posted to the website and e-mailed to each potential subcontractor. No questions will be responded to after the question and answer period has expired.

- iii. **METHOD OF SUBMISSION:** Vendors must submit an original copy of all materials required for acceptance of their proposal to:

**Piedmont Triad Regional Council
Mrs. Nikia Beal
1398 Carrollton Crossing Drive
Kernersville, NC 27284**

An authorized PTRC representative in the above office must receive the proposals. **The last day to submit a proposal will be Friday May 30, 2025**. All proposals must be time-stamped at PTRC by an authorized representative prior to the proposal closing time. Proposals not so stamped will be considered late. All proposals must be packaged, sealed and show the following information on the outside of the package:

- Subcontractor's Name and Address
- Request for Proposal Title
- Proposal Due Date
- Date Proposal Submitted

- iv. **INQUIRIES:** All inquiries concerning this Request for Proposals (RFP) will be submitted via e-mail to: nbeal@ptrc.org. During the procurement process, prospective subcontractors shall direct any inquiries to the e-mail address provided. In no case shall oral communications take precedence over written communications.
- v. **AMENDMENTS TO THE RFP:** If a change to the RFP solicitation (i.e. scope of work, pricing schedules, etc.) becomes necessary after it has been issued, a written amendment will be issued to all prospective subcontractors. The amendment will formally detail each change, however all terms and conditions which are not modified remain unchanged.

3. PROPOSAL ACCEPTANCE, EVALUATION, AWARD AND PROTEST PROCEDURES:

- i. **PROPOSAL ACCEPTANCE:** Proposals which do not comply with instructions or are unable to comply with specifications contained in this RFP may be rejected by PTRC. PTRC may request reports on a subcontractor's financial stability and if financial stability is not substantiated may reject a subcontractor's proposal. PTRC retains the right to accept or reject any or all proposals, and accept or reject any part of a Proposal deemed to be in the best interest of PTRC. PTRC shall be the sole judge as to compliance with the instructions contained in this RFP.

ii. **PROPOSAL EVALUATION:** Proposals will be evaluated by assigned PTRC staff to verify that they will meet all specified requirements in this RFP. This verification may include requesting reports on the subcontractor's financial stability, conducting demonstrations of the vendors' proposed product(s) and/or service(s), and reviewing results of past awards to the subcontractor by PTRC. Proposals from certified Minority Business Enterprises may be provided up to a five percent (5%) proposal preference in accordance with North Carolina General Statute 143-59.

iii. **NOTIFICATION OF INTENT TO AWARD:** Any subcontractor who responds to this RFP with a proposal will be notified in writing of PTRC's intent to award the contract(s) as a result of this RFP. After notification of the intent to award is made and under the supervision of agency staff, copies of proposals will be available for public inspection between 8:30 am to 4:00 pm at 1398 Carrollton Crossing Drive, Kernersville, NC, 27284. Subcontractors can schedule reviews with the authorized PTRC representative to ensure that space is available for the review.

iv. **PROTEST PROCEDURES:**

PURPOSE: To provide specific actions which will be taken should a protest be filed by an unsuccessful subcontractor.

Protester Procedures:

- a. File a written complaint using the agency specified format within ten (10) working days after notice of rejection.

Contract Coordinator

- a. Notify subcontractor that a complaint of protest has been filed.

Administration

- a. Schedule the meeting of protest committee to review complaint.

Protest Committee

- a. Conduct meeting to evaluate protest within ten (10) working days of the filing of the receipt of protest.
- b. Record minutes of evaluation of protest committee meeting.
- c. Issue a decision to agency administration within five (5) working days of the meeting of the protest committee.
- d. Notify protester of the decision of the protest committee.

ADDITIONAL INFORMATION:

Protest format will contain the following:

- a. Notice of protest and specific reasons for filing the protest.
- b. Statement stating this is a protest letter.
- c. A detailed statement of the grounds for protest.
- d. A specific request for a ruling by the protest committee and a statement of the relief requested.

*If this information is not furnished, PTRC may refuse to consider the protest. Protests must be submitted in writing. The individuals who sit on the protest committee must be identified in writing prior to commencement of all procurement activities. The contract coordinator and program director should not be involved in the protest procedures other than to provide technical support to the protest committee.

4. Scope of Services

Scope of Services

The Subcontractor agrees to provide the services and/or materials described in detail below:

1. **Evaluate, clean and tune (ECT)** heating/cooling equipment per ANSI/ACCA Standard 4 (Maintenance of Residential HVAC Systems) and North Carolina Weatherization Assistance Program Guidelines, providing full documentation of tests performed, conditions observed and recommended actions.
 - a. Evaluation should include a visual inspection of existing ductwork, and, if applicable, notifying the Contractor of any deficiencies noted.
 - b. Evaluation should include combustion and safety testing, if applicable.
 - c. Conduct minor repairs to the heating/cooling system as determined by the ECT. For the purposes of this agreement, minor repairs are defined those repairs that and may be performed by Subcontractor performing the ECT service at the time of the initial service at no additional cost.
 - d. Specify any additional work needed by electrician and/or plumber to achieve efficient, safe and code compliant operation of the unit. Any electrical and/or plumbing services must be separately contracted with by the Contractor; if the Subcontractor prefers a specific electrical or plumbing service provider, he/she may submit that request to the Contractor, and that company must provide a contract.
 - e. Follow procedures for servicing, repairing, and disposing of any and all refrigerant-containing devices, units, and systems as outlined by federal, state, and local laws and regulations now in effect or hereinafter enacted which pertain to the Federal Clean Air Act of 1990.
 - f. Remove any and all non-functioning equipment and parts associated with system, including obsolete ductwork, unless otherwise specified by the Contractor.
 - g. Follow guidelines imposed by OSHA confined spaces effective February 1, 2016.
2. Replace non-functioning HVAC equipment with equipment of comparable size and type according to Manual J calculations and having an efficiency rating meeting or exceeding Section 7610 of the NC Weatherization Installation Standards. New System must use the same fuel type (oil, propane, electric, etc) as the existing system unless prior approval is granted by Contractor to convert fuel type. Installation must meet ANSI/ACCA Standard 5 (Installation of Residential HVAC Systems) and North Carolina Weatherization Assistance Program Guidelines.
 - a. Specify any additional work needed by electrician and/or plumber to achieve efficient, safe and code compliant operation of the unit. Any electrical and/or plumbing services must be separately contracted with by the Contractor; if the Subcontractor prefers a specific electrical or plumbing service provider, he/she may submit that request to the Contractor.
 - b. Remove any and all non-functioning HVAC equipment and parts associated with system, including obsolete ductwork.
 - c. Follow procedures for servicing, repairing, and disposing of any and all refrigerant-containing devices, units, and systems as outlined by federal, state, and local laws and regulations now in effect or hereinafter enacted which pertain to the Federal Clean Air Act of 1990.
 - d. Provide original documentation of the Manual J calculation, new HVAC system operation manual and warranty information to the Contractor with the invoice.

5. RFP Checklist

The following forms must be completed and submitted with the proposal in accordance with the instructions noted on the front cover sheet of the RFP:

- Subcontractor Information –Attachment 1
- Subcontractor References –Attachment 2
- Business Licenses
- Sample of Company Invoice **(for new contractors only)**
- Trade Certifications & Trainings
- Proof of Insurance in the following categories:
 - (1) **Worker's Compensation** – The Subcontractor shall provide and maintain Worker's Compensation Insurance as required by the laws of North Carolina, as well as employer's liability coverage and minimum limits of \$300,000.00, covering all of Subcontractor's employees who are engaged in any work under the contract. Sole proprietorships and partnerships with less than three (3) employees, in addition to the sole proprietor or partners, are not required to have Worker's Compensation.
 - (2) **Commercial General Liability** – General Liability Coverage on a Comprehensive Broad Form on an occurrence basis in the minimum amount of \$100,000.00 Combined Single Limit of Limit. (Defense cost shall be in excess of the limit of liability.)
 - (3) **Automobile** – Automobile Liability Insurance, to include liability coverage, covering all owned, hired and non-owned vehicles used in performance of the contract. The minimum combined single limit shall be \$500,000.00 bodily injury and property damage; \$500,000.00 uninsured/under insured motorist; and \$1,000.00 medical payment.

SUBCONTRACTOR INFORMATION

Attachment 1

1. **Business Name:** _____
2. **Owner(s) Name:** _____
3. **Contact Person:** _____
4. **Physical Address:** _____

5. **Billing Address (if different from physical):** _____

6. **Telephone:** _____ **Fax:** _____
7. **Email address:** _____
8. **Company Structure (corporation, partnership, sole proprietorship):** _____
9. **Business Type (Trade):** _____
10. **Years in Business:** _____
11. **Federal Tax Identification Number:** _____

Subgrantee: **Piedmont Triad Regional Council****SUBCONTRACTOR REFERENCES**

Subcontractor:			
Provide company name, address, contact person, telephone number, and appropriate information on product(s) and/or service(s) used for four (4) or more installations with requirements similar to those included in this solicitation document. If vendor is proposing any arrangement involving a third party, the named references should also be involved in a similar arrangement.			
Company Name:			
Address (include Zip)			
Contact Person:		Phone No:	
Product(s) and/or Service(s)			

Company Name:			
Address (include Zip)			
Contact Person:		Phone No:	
Product(s) and/or Service(s)			

Company Name:			
Address (include Zip)			
Contact Person:		Phone No:	
Product(s) and/or Service(s)			

Company Name:			
Address (include Zip)			
Contact Person:		Phone No:	
Product(s) and/or Service(s)			