

5. SECTION B - SCOPE OF SERVICES:

5.1. Background

Montgomery County is seeking proposals for a licensed Home Improvement contractor to make energy efficiency and electrification improvements in the single-family homes of low-income homeowners in the County. The Scope of Work will include replacement of HVAC systems, water heaters, appliance as well as some minor other electrical repairs as described below. Where applicable, the Scope of Work may require converting fossil fuel appliances to electric equivalents. The Contractor will be provided with a specific Scope of Work Order (see Exhibit V) for each property and the Contractor will be required to complete all repairs listed on the Work Order within 90 days of receipt of the Work Order. The County intends to award one (1) contract resulting from this RFP. Referrals to the Installation Contractor are expected to begin shortly after contract execution. The Contractor should be able to start installations as soon as a Contract is executed and a funded Purchase Order and Notice To Proceed is provided to the Contractor

5.2. Intent

The Efficient Electric Appliance program will be funded for a two-year period and will consist of two (2) components. One (1) component is for the Efficient Electric Appliance Operations Program (EEAOP) which will administer the activities and will be covered under a separate solicitation and Contract. The other component is for Efficient Electric Appliance Installation Services (EEAIS) (this RFP) which will provide the actual installation services for these improvements.

The total program budget for the initial two-year Term (subject to availability of funding) for the EEAIS contract will be approximately \$614,010 and is separate from the budget for the EEAOP.

Montgomery County Department of Housing and Community Affairs (DHCA) is seeking a licensed Home Improvement Contractor to perform energy efficiency and electrification improvements to houses owned by low-income homeowners. Approximately 25-40 homes will be completed over the two-year contract Term.

5.3. Scope of Services

The Contractor must:

1. Receive Work Orders (see Exhibit V) from the Efficient Electric Appliance Operations Program Contractor (EEAOP)
2. Schedule and conduct a site visit to each home (estimated 15-30 per year) and verify the Scope of Work and schedule installation visit with homeowner.
3. Within 24 hours of visit, advise EEAOP Contractor of any discrepancies within Work Order identified in site visit.
4. Execute an Agreement with EEAOP Contractor (on forms approved by DHCA)
5. Obtain permits for all activities requiring permits and arrange for all required inspections (including plumbing, electrical, mechanical, etc.)
6. Ensure all installed equipment meets the specifications as listed in Exhibit IV for list of qualifying appliances.
7. Arrange for installation of ordered improvements by Contractor employees (if appropriately licensed) or with Subcontractor(s) (appropriately licensed)
8. Arrange for removal of original appliances to be replaced (including furnaces, stoves, refrigerators, oil tanks, etc.)
9. Resolve any disputes among or between homeowners and employees or Subcontractors that arise during installation work and promptly advise EEAOP Contractor of any difficulties in bringing to resolution.
10. Keep EEAOP Contractor apprised of work schedules for all properties and provide prompt notice of time for inspection of completed work prior to submittal of invoices.

11. Provide copies of manufacturers' warranties and other documentation packaged with appliances to EEAOP contractor.
12. Provide an invoice to EEAOP Contractor (include verification of payment for materials and services if requested).
13. Respond to, and resolve, all labor and/or parts warranty claims for a minimum one-year period after completion of work at each home.
14. Complete National Environmental Policy Act (NEPA) paperwork in coordination with DHCA, if project work requires.

5.4. Contractor's Qualifications

The Contractor must be able to demonstrate the capacity to conduct the volume and level of work in the allotted time periods, as indicated under Scope of Services, Sections B.5.3., B.5.5., and B.5.7. Time is of the essence in performing the improvements under the resulting Contract. The Contractor must obtain permits and inspections where legally required and ensure all persons performing such improvements must have the required valid licenses, including plumbing, electrical, mechanical, etc. required for performance of those activities. When submitting proposals, Contractors must include a copy of their licenses and those of any Subcontractors that are anticipated to be used for installations. More specific requirements are listed below under submission requirements in Section E.

Please note, at a minimum, the Contractor must:

1. Hold a current Maryland Home Improvement Contractor License.
2. Be a business entity in good corporate standing with Maryland Department of Assessments and Taxation (SDAT).
3. Demonstrate experience performing the types of services included under the Scope of Services including fuel switching conversions in single-family homes. Fuel-switching requires electrical panel assessment, credible Manual J load calculation and installation to code and the manufacturer's recommendations.
4. Submit documentation from surety of the offeror's bonding capacity
5. Demonstrate adequate capacity to complete the volume of work described herein including providing a list of current licenses held and the names of licensed sub-contractor(s) including their trades, anticipated using in performing the work under this contract.

5.5. Contractor's Responsibilities

The Contractor must schedule and acceptably complete all Work Order items within 90 days from the receipt of the Work Order, unless otherwise approved by DHCA. Time is of the essence. If the Contractor fails to consistently deliver these services within these parameters, the County reserves the right to find the Contractor in default of the terms of this contract.

All laborers and mechanics performing construction, alteration, or repair work on projects funded in whole or in part by awards made as a result of this Contract are to be paid or will be paid wages at rates not less than those prevailing on projects of a character similar in the locality as determined by subchapter IV of Chapter 31 of Title 40, United States Code (Davis-Bacon Act). See Exhibit VI and Attachment D.

5.6. County's Responsibilities

The County will coordinate with the Efficient Electric Appliance Operations Program (EEAOP) Contractor and conduct its own inspections of completed work as determined by the County. The County will arrange for monthly payment of Contractor's invoices following successful inspections.

5.7. Methods of Ordering Work

- 5.7.1. Blanket Purchase Orders: The County may issue work under a blanket purchase order for one or more assignments. Per assignment, the Contract Manager will coordinate with the Contractor for the work to be performed. The Contract Manager will also provide written direction to the Contractor.

- 5.7.2. **Task Orders:** The County may issue a written Task Order Proposal Request (TOPR), which will include, but is not limited to, a description of the scope of work/assignment; expected objectives; deliverables; a completion/milestones schedule, including assumptions for staff reviews; any background information to be supplied by the County; and time limit for response to the TOPR.
- 5.7.2.1. In response to the TOPR, the Contractor must submit a written, signed Task Order Proposal which addresses all requirements of the TOPR within the timeframe stipulated by the County.
 - 5.7.2.2. The County will review the Contractor's Task Order Proposal and reserves the right to negotiate with the Contractor for any labor categories, number of hours, or any other items included in the Task Order Proposal. The County also reserves the right to request backup documentation to support detailed cost proposals within two (2) business days of the County's request.
 - 5.7.2.3. The Contractor must bear all costs relating to meetings with the County to discuss new assignments, preparing Task Order proposals, negotiating proposals with the County, etc.
 - 5.7.2.4. Once finalized, Task Order documents must be signed and dated by both the County's Contract Administrator and the Contractor. The Contractor must not perform any work until it has received an executed Task Order, a Purchase Order, and a Notice to Proceed.
 - 5.7.2.5. Once approved, Task Orders and related schedules may be changed only with prior written authorization by the County.

5.8. Reports/Deliverables

Along with the monthly invoice, the Contractor must provide monthly written reports to the County indicating:

1. Address of all property referred by the EEAOP Contractor;
2. Date of referral;
3. Date of initial property visit;
4. Projected date of completion of work at each property;
5. Addresses of all properties completed during that month; and
6. Narrative description of any scheduling or other difficulties encountered contributing to delays.
7. Geotagged pre- and post-installation photos for HVAC (indoor and outdoor units) and domestic hot water (DHW) appliances, including legible nameplates and the units in their surroundings.