

# Home Efficiency Assistance Program (HEAP)

Contract Management Department

# Procurement Objectives

Provide a contracting model that:

- Meets savings to investment ratio of 1 or greater defined by National Energy Audit Tool (NEAT)
- Maximizes the opportunity for participation of interested contractors of all sizes
- Manages the equity and parity concerns realized from lessons learned with ARRA contracts
- Facilitates the monitoring and tracking of assignments, contractor utilization, and work progress

# Procurement Method

## Job Order Contract (JOC)

- Utilizes “Best Value” selection method
- Evaluation criteria is used to select Contractor who offers most advantageous proposal based on criteria
- Criteria includes competitively bid coefficient applied to an established unit price book listing of work items
- Pros:
  - Conforms with State Bidding and City Charter requirements
  - Ability to include prices as a factor in determining qualifications
  - Ability to select multiple qualified and experienced contractors
  - Loaded overhead and profit or coefficient taken into consideration
  - Can break work into separate contracts (Test Out and Weatherization) with provisions that Contractors can't perform Test Out on their own work

# Job Order Contract Method

- Two (2) separate JOC solicitations will be issued
  - (1) – Weatherization only
  - (2) – Weatherization + HVAC
- CMD determining if JOC procurement method will be best option for Test-Out Services

# Status

- Evaluation Criteria
- Training Component

# EVALUATION CRITERIA

## ITEM 1: Debarment or Suspension Lists

- Gatekeeper Item
- If Contractor and/or its principals are on a suspension or debarment list, their proposal will not be considered

# EVALUATION CRITERIA

## ITEM 2: Acceptable Documentation

- Gatekeeper Item
- Contractors shall comply with project and page number limitations stated in the Submittal Requirements
- If any of the submittal requirements are not included, the Contractor may be deemed non-responsive and the proposal may not be considered

# EVALUATION CRITERIA

## ITEM 3: MBE/WBE Procurement Program

- Gatekeeper Item
- Contractors must submit No Goals Plan Form
- Contractors must comply with the City's MBE/WBE Procurement Program should subcontracting opportunities be identified
- If the Contractor does not comply with the requirements of the MBE/WBE Procurement Program, Offeror may be deemed non-responsive and the proposal will not be considered



# EVALUATION CRITERIA

## ITEM 4: Offeror's Financial Capability

- Gatekeeper Item
- The City is interested in the Contractor's financial viability.
- Letter from Contractor's Financial Institution stating their ability to secure credit up to:
  - \$16,200 – Weatherization only
  - \$45,000 – Weatherization + HVAC

# EVALUATION CRITERIA

## ITEM 5: BPI Certification

- Gatekeeper Item
- Offeror must have, at a minimum, one (1) BPI Certified employee that will perform or oversee the work
- The certification must be current at the time of submittal
- Offeror must renew the certification as needed

# EVALUATION CRITERIA

## ITEM 6: Price/Coefficient Factor

- Contractors must submit a “Coefficient Factor” to cover overhead, profit, and any other costs that are not included in the Unit Price Book
- The lowest coefficient factor for Standard Working Hours will receive the maximum points, with others receiving a score based on a table of ranges

# EVALUATION CRITERIA

## ITEM 7: Comparable Experience

- The Offeror must present evidence of its experience based upon the successful completion of three (3) similar weatherization programs
- The experience identified must be of similar size, scope and complexity.

# EVALUATION CRITERIA

## ITEM 8: Experience, Quality of Services & Reputation

- Reference checks will be conducted on projects listed in Evaluation Criteria Item 7
- Points will be allocated according to frequency and magnitude of issues experienced on projects within the past 10 years
- Specific considerations may include:
  - Timely completion of projects
  - Timely resolution of work or material deficiencies cited
  - Any instances of mechanical liens being placed on contractors projects
  - Cooperative working relationship with entity and residential homeowners for which work was performed
  - Prompt payment of subcontractors and suppliers at all levels
  - Compliance with prevailing wage provisions
  - Compliance with other contract terms

# EVALUATION CRITERIA

## ITEM 9: Organizational Structure and Business Practice

- Communications
  - Describe interface with homeowners and City staff
- Schedule Strategies
  - Strategies to minimize delays and areas for possible time savings
- Technical Plan
  - Describe plan for accomplishing an assignment
  - Include description of work plan by task and steps you will take to complete them
- Quality Control Plan

# EVALUATION CRITERIA

## ITEM 10: Quality of Goods and Services by Sustainability

- Sustainable Practices
  - Include business practices and internal policies that describe your use of recycled, reclaimed, or refurbished construction materials.
  - Include internal policies and practices that encourage water and energy conservation, reducing greenhouse gas emissions, and purchasing environmentally preferable products
- Local Business Presence
  - If firm is headquartered in Austin Corporate City Limits or has a branch office in operation for the last 5 years

# Training Component

- First training session scheduled for August 29<sup>th</sup> at the MACC
- The first training is for the certified firms that went through the initial weatherization/BPI certification training through AE along with an invite to service providers and any of their interested members
- Notifications will be sent out by the end of this week



# Next Steps

- Contract Documents for solicitations
- Finalizing Evaluation Criteria for solicitations
- Procurement method for Test-Out Services
- Launch Training Component
- Council Action to use JOC methodology anticipated in September

# QUESTIONS?