

	<p style="text-align: center;">State of Ohio Weatherization Program Standards</p>	Section	<b>ADMINISTRATION</b>
		Subject	<b>Contracting Method</b>

### *CONTRACTED METHOD 905*

Once the provider has determined that the project will proceed, it may begin searching for an architectural, engineering, or mechanical contracting firm to bid on: 1) auditing services, 2) providing plans and specifications, 3) contract management, 4) materials installation, or 5) any or all of the above.

**contracted method**  
905-1

A Request for Qualifications (RFQ) should seek information on the expertise of a firm and determine whether the firm is interested in bidding on the various aspects of upcoming projects. The RFQ should give the potential bidder an idea of what specifications will be imposed on the project. A RFQ should result in the development of a list of bidders.

**request for  
qualifications (RFQs)**  
905-2

All procurement must follow the appropriate procurement rules for the level of the cost of the services to be performed. Large purchases (those over \$5,000) must always follow the Request for Proposals (RFP) formal bidding guidelines. Specific services (auditing, plans and specifications, etc.) may be bid separately. If the same firm bids on several aspects of a project, or if several projects will be considered during the same program year, the rules governing aggregation of costs must be followed.

**request for proposals/  
procurement rules**  
905-3.1a

A comprehensive energy analysis must be performed on each building in order to determine the feasibility of entering into an agreement to provide for the installation and implementation of EEMs at the building.

**feasibility/energy  
analysis**  
905-3.1.b

Any request for proposals must include with the description of the project a notification that all applicable codes must be followed, that all permits are required for the customer file, and that all life/safety codes will be adhered to.

**notification/codes**  
905-3.1c

Any request for proposals must include with the description of the project a notification that all work must be cost-justified using an approved energy auditing tool. The energy auditing tool must consider the following and must evaluate the interactive effects of the various EEMs.

**notification/auditing  
tool**  
905-3.1d

**EEMs**  
905-3.2

EEMs are of three general types: 1) general weatherization, including insulation retrofits, air sealing, window and door repair and replacement, 2) heating/cooling system retrofits including zone controls and thermostat installation, burner tune-up and replacement, boiler replacement, and 3) electrical EEMs including the lighting retrofits, motor, pump and fan replacements (HVAC, elevators, etc.) and appliance replacements (non-HWAP-funded).

**notification/audit  
parameters**  
905-3.3a

Any RFPs must include with the description of the project a notification that the SIR calculations embedded in the audit must incorporate the current DOE fuel escalation rates and must evaluate the discounted lifetime savings using the current HUD discount rate.

**notification/report  
contents**  
905-3.3b

Any RFPs must include with the description of the project a notification that the firm will perform the analysis and prepare a detailed engineering report that specifically identifies the energy efficiency measures and operational changes and maintenance changes that are recommended to be installed or implemented at the building. The report shall contain detailed projections of energy and cost savings to be obtained by the buildings' energy purchaser as a result of the installation of the recommended EEMs and shall itemize all anticipated project, operational and maintenance costs. The report shall describe the firm's plan for installing or implementing the measures at the building. The primary purpose of the report is to provide an engineering basis for negotiating an energy services agreement between the HWAP and the firm.