

-- REQUEST FOR PROPOSALS --

for the

BAY MILLS INDIAN COMMUNITY WEATHERIZATION
ASSISTANCE PROGRAM

in partnership with the

INTER-TRIBAL COUNCIL OF MICHIGAN



TO

Qualified contractors, companies or organizations capable of performing weatherization upgrades on multiple homes

Qualified contractors, companies or organizations capable of installing heat pumps on multiple homes

DUE

September 25, 2024 by 4 p.m. EST

REQUESTED BY

Bill Bernier, Environmental Services Director
Inter-Tribal Council of Michigan
2956 Ashmun Street, Sault Ste. Marie, Michigan 49783

PROPOSAL & SELECTION TIMELINE

- **September 13, 2024:** RFP issued and advertised
- **September 19, 2024:** Pre-proposal questions (in writing) due
- **September 23, 2024:** Responses to pre-proposal questions issued
- **September 25, 2024:** Window for accepting proposals closes at 4 p.m.
- **October 04, 2024:** Evaluation of proposals completed; company or individual notified, and contract is negotiated
- **October 11, 2024:** Suggested project commencement

THIS IS A QUALIFICATION AND PRICE BASED SELECTION PROCESS

SUMMARY & BACKGROUND

The Inter-Tribal Council of Michigan (“ITC”) is a non-profit, inter-tribal consortium whose mission is to act as a forum for member tribes; to advocate for member tribes in the development of programs and policies which will improve the economy, education, and quality of life for Michigan’s Native Americans; and to provide technical assistance to member tribes, assisting in the development of tribal regulations, ordinances, and policies applicable to health and human services.

The Bay Mills Indian Community (“BMIC”) is a federally recognized sovereign nation located in the rural eastern Upper Peninsula of Michigan on the shores of Lake Superior. The people of Bay Mills are Ojibwa (or Chippewa) and have resided in this area since time immemorial. BMIC was granted a federal Corporate Charter pursuant to Section 16 of the Indian Reorganization Act on June 18, 1934. BMIC is one of the four original reservations established in Michigan. There are currently 2,258 enrolled Tribal members, with approximately 1,400 members living with the tri-county (Chippewa, Luce, Mackinac counties) service area.

ITC is currently accepting proposals for weatherization upgrades on Tribal homes through our Weatherization Assistance Program. This program is assisting Tribal homeowners, both on and off the Reservation, with weatherization upgrades and energy efficiency improvements

The purpose of this request for proposals (RFP) is to solicit proposals from multiple contractors, companies and organizations (“APPLICANT”) to ensure ITC and BMIC’s limited resources will be used efficiently through a competitive and sealed bidding process that evaluates all proposals equally based upon the criteria listed in this document, and to select an APPLICANT that will be able to deliver what is needed within the specified timeframe.

PROPOSAL GUIDELINES

This RFP represents the requirements for an open and competitive process. ITC is expecting to award 2 – 4 applications. Proposals will be accepted until 4 p.m. on September 25, 2024. No proposals will be considered after the deadline. ITC requires the proposals to be signed by an official agent or representative of any company or organization that submits a proposal.

If an APPLICANT submits a proposal, but intends to outsource or contract, this must be clearly stated in the proposal. Furthermore, all costs stated in the proposal must be all-inclusive to include all outsourced or contracted work. Any proposals that call for the outsourcing or contracting of work must include descriptions of the company being used, and descriptions of the work they will be providing through their services.

This is a qualification and price-based selection process. Please indicate in your proposal if you are applying to perform work for Phase I or Phase II of this project or both phases. Definitions of Phase I and Phase II are below in the *Project Purpose and Description* section.

Please refer to the requirements outlined in the other sections of the RFP for further clarification on what a strong proposal should include.

CONTRACT

Contract terms and conditions will be negotiated upon selection of the winning proposal(s).

The APPLICANT will be reimbursed at multiple points during the project. This will be determined during negotiations (monthly, per household, etc.). Please see the timeline on page 7.

With the nature of this project, ITC will assume that each home will have a different cost for what the house needs. At the time of the finalization of the contract, the APPLICANT and ITC will agree on a rate of pay for time and will work together to finalize the funding needed per household on a house-by-house basis.

The APPLICANT shall not be reimbursed for expenses beyond the cost figures agreed upon in the price proposals per house. The APPLICANT shall, at no time, pursue additional compensation for work not previously agreed to in writing at the signing of the contract for this project.

PROJECT PURPOSE & DESCRIPTION

Purpose:

The primary objectives of this project are to assist BMIC Tribal homeowners to make their homes more energy efficient, decrease home heating costs and lower greenhouse gas emissions.

ITC will collaborate with BMIC and have Tribal members apply to the Weatherization Assistance Program. The program is designed to make repairs and other energy efficiency investments in approximately 13 to 35 low-income tribal homes; convert their primary heating source from propane or natural gas to electricity through the installation of highly efficient heat pumps; and otherwise prepare Tribal residential buildings to transition to a fully electrified, zero-emissions future that is powered, heated, and cooled by renewable energy.

Description:

This project contains two different phases. Phase I (Energy Audit and Weatherization) will entail an assessment of an applicant's house to determine energy usage and what, if any, weatherization upgrades and repairs are needed. The end product of this phase is to complete any necessary weatherization repairs and upgrades to ensure a heat pump is an effective and efficient primary heating system. Currently there are **15 houses** selected for the program and if funding allows, more will be added.

Once Phase I is completed on any home, Phase II (Heat Pump Installation) will begin on that home. This entails installing a heat pump system that is correctly selected to maximize efficiency and effectiveness.

PHASE I – Energy Audit and Weatherization:

Phase I (Energy Audit and Weatherization) will entail an assessment of an applicant’s house to determine energy usage, energy efficiency and what, if any, weatherization upgrades and repairs are needed. The end product of this phase is to complete any necessary weatherization repairs and upgrades to ensure a heat pump is an effective and efficient primary heating system

It is expected that the APPLICANT be willing to effectively communicate with ITC and work with ITC to determine weatherization needs at each home. ITC is encouraging applicants to explain how they would maximize efforts to get as much weatherization done before weather impedes the ability to work on building envelopes. Throughout the project ITC will also be encouraging the use of rebate programs and using rebates to help maximize the funding available for home projects. If an APPLICANT has warranty policies, please provide that policy in the application.

PHASE II – Heat Pump Installation:

Phase II (Heat Pump Installation) will begin as soon as phase I is completed at each home. This entails installing a heat pump system that is correctly selected to maximize efficiency and effectiveness.

It is expected that the APPLICANT be willing to effectively communicate with ITC and work with ITC to determine the best heat pump system to maximize efficiency and effectiveness for each homeowner. ITC encourages applicants to provide examples of past heat pump installations along with examples of the invoice or budget associated with the installation examples. It is also recommended that applicants provide examples of what types (ductless, mini-splits, models) of heat pumps they have installed as well as their company’s warranty policies. Throughout the project ITC will also be encouraging the use of rebate programs and using the rebates to help maximize the funding available for home projects.

PROJECT DELIVERABLES

Phase I:

1. Work schedule/plan (October 2024 – November/December 2024, Spring of 2025 if needed)
2. Site visits with ITC to determine weatherization needs (Oct – Nov 2024, Spring of 2025 if needed)
3. Bi-Weekly or monthly calls to update ITC on progress (switch to monthly when weather impedes ability to work, or the 15 homes are completed*)
4. Project Reports – projects at each home should be adequately described so ITC can report on all that was done for each home (due when weatherization is completed at each home)
 - a. Reports should include what was fixed and/or installed

*Even though the 15 homes may be completed before Winter impedes the ability to work, monthly calls are still encouraged to keep communication open with ITC so ITC can let the APPLICANT know if more homes become available

Phase II:

1. Work schedule/plan (October 2024 – September 2025 if needed)
2. Site visits with ITC to determine best heat pump system (Oct – Nov 2024, Spring of 2025 if needed)
3. Scheduled bi-weekly or monthly calls to update ITC on progress (switch to monthly calls when weather impedes ability to work, or the 15 homes are completed*)
4. Project reports/descriptions - installations at each home should be adequately described so ITC can report on all that was done for each home (due when heat pump installations are completed at each home)
 - a. Reports should include what was installed

*Even though the 15 homes may be completed before Winter impedes the ability to work, monthly calls are still encouraged to keep communication open with ITC so ITC can let the APPLICANT know if more homes become available

Project End:

The project will end when all funding avenues are exhausted. Upon completion of weatherization at the 15 homes, ITC will work with Heating Ventilation Air Conditioning (HVAC) specialists to install heat pumps. If there is funding remaining after each of the 15 homes are budgeted for heat pump installations, more homes will be added to the overall list.

Upon completion of each home project, whether it be weatherization upgrades or heat pump installation, project reports must be delivered to ITC. These reports must describe what work was completed and what equipment was installed.

PROJECT SCOPE

Please refer to *Project Deliverables* on the previous page for an explanation of how the work required of this section must be completed and by when it must be delivered.

PHASE I: ENERGY AUDIT AND WEATHERIZATION

1. Analysis of Household
 - a. This will include assessment of the house/building envelope and what will be needed to improve the efficiency of the home. This analysis is expected to be completed together by ITC and the APPLICANT.
 - i. ITC will be in charge of the Energy Auditing unless an APPLICANT can and is willing to provide both services.
 - b. The APPLICANT will provide recommendations for what needs to be repaired to improve weatherization
 - c. ITC and the APPLICANT will agree on what needs to be repaired and agree on funding needed to perform the repairs and upgrades.
 - i. The APPLICANT will submit an invoice for partial time and supplies/equipment

2. Weatherization Repairs and Upgrades
 - a. The APPLICANT will perform the weatherization repairs and upgrades
 - b. The APPLICANT will submit an invoice for the work completed
 - i. A report should be submitted along with the invoice describing what work was done and what, if anything, was installed on the house
3. Communication Involvement
 - a. Communication between ITC and the APPLICANT is highly encouraged throughout the project.
 - i. ITC is recommending a scheduled call either monthly or bi-weekly with the APPLICANT to determine progress on projects and to also touch base and assist APPLICANTS with any technical assistance that may be needed.
 - ii. All projects on homes are limited by the amount of funding available. If the 15 homes are completed and there is funding available to do more, ITC will let the APPLICANT know during the scheduled meetings/calls.

PHASE II: HEAT PUMP INSTALLATIONS

1. Analysis of Household
 - a. This will include assessment of the house/building to determine what type of heat pump should be installed to maximize efficiency and effectiveness. This analysis is expected to be completed together by ITC and the APPLICANT.
 - b. The APPLICANT will provide recommendations for what type of heat pump will work the best
 - c. ITC and the APPLICANT will agree on what needs to be ordered and installed
 - i. The APPLICANT will submit an invoice for partial time and supplies/equipment
2. Installation of Heat Pump System
 - a. The APPLICANT will perform the installation of the heat pump system
 - b. The APPLICANT will submit an invoice for the work completed
 - i. A report should be submitted along with the invoice describing what work was done and what type of heat pump was installed.
3. Communication Involvement
 - a. Communication between ITC and the APPLICANT is highly encouraged throughout the project.
 - i. ITC is recommending a scheduled call either monthly or bi-weekly with the APPLICANT to determine progress on projects and to also touch base and assist APPLICANTS with any technical assistance that may be needed.
 - ii. All projects on homes are limited by the amount of funding available. If the 15 homes are completed and there is funding available to do more, ITC will let the APPLICANT know during the scheduled meetings/calls.

REQUEST FOR PROPOSAL & PROJECT TIMELINE

Below is the timeline for this project. *The September 30, 2025 deadline for the entire project must be delivered by this date due to funding requirements.*

- **September 13, 2024:** RFP issued and advertised
- **September 19, 2024:** Pre-proposal questions (in writing) due. These may be sent via email to bbernier@itcmi.org using the subject line “BMIC Weatherization Assistance Program 2024 Questions”
- **September 23, 2024:** Responses to pre-proposal questions issued. Answers to submitted questions will be emailed back to the sender.
- **September 25, 2024:** Window for accepting proposals closes at 4 p.m. Submissions after this time and date will not be considered (Additional details regarding submission are below).
- **October 04, 2024:** Evaluation of proposals completed; company or individual notified, and contract is negotiated
- **October 11, 2024:** Suggested project commencement
- **October 2024 – September 2025:** Meetings between ITC, APPLICANT, BMIC and homeowners.
- **June 1, 2025:** All deliverables for Phase I are due. Weatherization needs to be completed by this date to allow for adequate time for heat pump installations before September 2025.
- **September 01, 2025:** All deliverables for Phase II are due.
- **September 30, 2025:** Project concludes

PRICE PROPOSAL

Proposals must contain a price proposal included with the project proposal. The price proposal shall include anticipated hourly rates and a few examples of past projects and associated costs. Please include unit rates, if any, at which hourly costs are based.

ITC acknowledges that budgets and funding will change from house to house. ITC and the APPLICANT will work together on a house-to-house basis to determine the final budget for the work proposed.

BIDDER QUALIFICATIONS

Those submitting a proposal should also submit the following:

- Description of company, including relevant experience on similar projects
- Qualifications of staff who will be working on the project
- Examples of previously completed work
- Testimonials from previous clients
- Federal Identification Number or Employer Identification Number

DEADLINE & CONTACT INFORMATION

Those submitting a proposal must submit them by 4 p.m. EST on September 25th, 2024. Please mail hard copies to the address listed below. Those mailing copies should send at least 2 copies of the proposal. If you submit the proposal electronically, please email the proposal to bbernier@itcmi.org using the subject line “BMIC Weatherization Assistance Program Proposal 2024”

Inter-Tribal Council of Michigan
Attn: Bill Bernier
2956 Ashmun Street, Suite A
Sault Ste. Marie, Michigan 49783

Hand delivered proposals may be brought to the above address.

PROPOSAL EVALUATION CRITERIA

A committee of ITC and BMIC stakeholders will evaluate proposals based on the criteria in the table below. Phase I or Phase II criteria will only be scored on proposals submitting for either Phase I, Phase II or both.

	Excellent (4)	Good (3)	Fair (2)	Poor (1)	Missing (0)	Score	Comments
<i>Proposal will deliver on variables in Phase I of the Scope of Work</i>	Proposal will deliver beyond what is asked	Proposal will deliver what is asked	Proposal will deliver most of what is asked	Proposal will deliver some of what is asked	Proposal will not deliver what is asked		
<i>Proposal will deliver on variables in Phase II of the Scope of Work</i>	Proposal will deliver beyond what is asked	Proposal will deliver what is asked	Proposal will deliver most of what is asked	Proposal will deliver some of what is asked	Proposal will not deliver what is asked		
<i>Proposal has timeline that meets project timeline</i>	Proposal will deliver on time	-	-	-	Proposal will not deliver on time		
<i>Proposal states applicant will attend scheduled meetings</i>	Proposal will deliver beyond what is asked	Proposal will deliver what is asked	Proposal will deliver most of what is asked	Proposal will deliver some of what is asked	Proposal will not deliver what is asked		
<i>Proposal explains the methodology that will be used to fulfill the project requirements</i>	Proposal methodology has thorough detail	Proposal methodology has some detail	-	Proposal has methodology included but it is vague	Proposal does not include any methodology		
<i>Applicant has verifiable experience</i>	Applicant is specialized in field and able to present multiple examples	Applicant is specialized in field with at least one example	Applicant is qualified with tangentially related examples	Applicant is qualified with no examples	Applicant is not qualified		
<i>Applicant has testimonials from previous clients</i>	More than 3 testimonials are offered	3 testimonials are offered	2 testimonials are offered	1 testimonial is offered	No testimonials are offered		
<i>Applicant provides warranty information on installation of building envelope materials (phase I) or heat pump equipment (phase II)</i>	-	Warranty information provided	-	-	No warranty information provided		
<i>Native American Preference: Applicant is Native American or Company is Native American - owned</i>	-	Yes	-	-	No		