LANE REGIONAL AIR PROTECTION AGENCY (LRAPA)

COVER PAGE

Oakridge Air
Residential Upgrade Coordinator

Request for Proposal (RFP)

RFP # LRAPA-06-20-TAG
Date of Issue: May 24, 2020
Closing Date: June 24, 2020 4:00PM PST

Single Point of Contact (SPC): Nasser Mirhosseyni

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E-mail: nmirhosseyni@lrapa.org
1. PROJECT OVERVIEW

The Lane Regional Air Protection Agency, ("LRAPA"), is seeking Proposals from qualified entities for the Residential Upgrade Coordinator (RUC) ("Services") as described in the RFP. The RUC is a contract position and will provide programmatic leadership in the implementation of the Oakridge Air program’s woodstove upgrades, ductless heat pump installations and home weatherization components funded through the U.S. Environmental Protection Agency’s (EPA) Oakridge Targeted Airshed Grant (TAG) program. The RUC will serve as the main project manager and facilitator for the home heating and weatherization upgrades program. The RUC will be the main point of contact for the residents being served and will also coordinate with contractors to fulfill the work.

2. INTRODUCTION

For the last three decades, the health of residents in the rural community of Oakridge Oregon, has been compromised due to poor air quality from high concentrations of fine particulate (PM2.5) during the winter months from wood heating, and from wildfire smoke as climate change progresses. Local climate and topography (the city sits in a bowl of ridgelines) make the Oakridge area prone to wintertime temperature inversions, low wind speeds and poor atmospheric dispersion, which exacerbates the concentrations of smoke from uncertified woodstoves and improper burning techniques (more than 80% of PM2.5 is attributed to woodsmoke in winter). The City of Oakridge’s airshed is moving into compliance with Federal health standards (attainment) and has made considerable progress since 2007, when the 24-hour PM2.5 measurement was 47 micrograms per cubic meter (μg/m3). This progress is due to community stakeholders working programmatically and individually to improve air quality.

The overall project intent is to advance the reduction of particulate matter over the next five years, and to establish the infrastructure and programs that can sustain those reductions for the next generation of Oakridge residents. It is the expressed goal of this project to decrease and sustain the 24-hour PM2.5 count below 30 μg/m3. Specifically, community leaders are eager to “finish the job.” This program will prioritize efforts to target homes that heat only with wood, with low-income residents, and those who suffer from environmental injustice, meaning they are disproportionately exposed to woodsmoke because of the neighborhood they live in based on what they can afford.

The Residential Upgrade Coordinator will serve as a project manager for the residential heating and weatherization upgrades for the community. The overall Oakridge Air program (https://oakridgeair.org/) is planned for a five-year period, although the delivery of heating system upgrades could follow a shorter timeline, which would increase the community benefit. The pace of work is subject to variables within and outside the scope of the RUC’s control; therefore, the outcomes of 145 heating upgrade interventions (weatherization, woodstove upgrades and ductless heat pumps) are the primary condition for the pace of the program. In total, 435 interventions will be made amongst the three types of heating upgrades and it is unlikely that all three will be made in each residence.

The RUC individual or team will provide the communication and outreach to the community to inform residents to participate in the program. Additionally, the RUC will serve as a liaison to the residents, assisting them in the process of heating upgrades including pre-assessment visits, calls or meetings to describe the program, assist in setting up appointments with the auditor and
contractors, helping residences with final selection of interventions, reviewing permitting, leading education with residents and reporting all needed paperwork for submission to EPA and LRAPA.

Based on peer TAG heating upgrade programs, we anticipate the level of effort for this position to be a 0.75 FTE and workload will shift based on season and timing of program interventions. We project the first year to be focused on developing local interest in the program and completing the initial pre-assessments to ensure program participation and qualification. The next three to four years will be dedicated to managing the residential heating upgrades and interfacing as needed with residents, the third-party auditor, and contractors.

3. CONTRACTOR REQUIREMENTS AND PREFERENCES

LRAPA is seeking an individual Project Manager or Team to provide the professional services to address the following aspects of the program management (“TAG RUC”):

- Recruit and manage homeowners and residents who qualify for upgrades.
- Provide education to customers about program elements and how they qualify and get the work done.
- Conduct participant home pre-assessments prior to an audit to ensure that residence meets qualifications.
- Coordinate the energy audit and final quality inspection.
- Work with the energy auditor to assess home needs and quality check the installations.
- Ensure that contracted installers that qualify are on the potential installer list for residents to choose.
- Ensure the quick payment of contractors after the installation is complete, quality checked and approved by the energy auditor, and the final permit is approved.
- Ensure all EPA terms and conditions are met.
- Ensure all reporting for US EPA is complete for each heating upgrade.
- Oversee program costs, payments and reporting on a monthly, quarterly and annual basis.
- Coordinate with other project partners such as the City of Oakridge, Good Company, the school district and the overall program coordinators.

The ideal RUC candidate or team has the following capabilities:

- Capacity to manage large volume of leads, contacts and schedules
- Skilled communication and is comfortable working with people in their homes.
- Collaboration skills to coordinate and work within a larger community effort.
- Skills in managing installation contractors and ensuring that technical issues are resolved between the contractor and resident.
- Familiarity with communities of Oakridge and Westfir.
- Knowledge, experience and comfort managing significant reporting to federal or state agencies.
- Willingness to be in the community of Oakridge at least three days a week during the high delivery season and for all necessary meetings with project partners.
- The capacity to complete quality control inspection (QCI) on 10% of residences being served by the program to ensure quality control of the third-party auditor.
4. **ELIGIBILITY**

All individuals, professional project managers, companies, teams, or established 501(c)3 non-profit organizations with experience in public project management are eligible for selection.

**Insurance Requirements**
- Automobile license and liability insurance
- Workers compensation or comprehensive general liability policy to cover potential accidents

5. **COMPENSATION**

Currently the funding allocated for this project is $326,500 to cover the five-year EPA-funded program. The initial year will compensate the contractor at 20% of the total budgeted cost. However, after the first year (July 2020 to June 2021), the RUC, LRAPA and Good Company will discuss the pace, outcomes and required budget to accomplish the work, which may allow for the work to be completed earlier than five years thereby increasing the annual allocation of funding. Federal guidelines for compensation for contract of this nature shall be adhered to.

6. **EVALUATION AND SELECTION CRITERIA**

A committee comprised of LRAPA staff and Oakridge Air partners will review the submissions for conformance with the requirements of the project description and will be evaluated and scored independently based upon the following criteria:

**Requirements and Qualifications**
- Ability to provide a local presence in Oakridge and Westfir
- Demonstrated ability for community engagement including customer service, education, in-person outreach work and problem solving
- Demonstrated capacity to manage large volume of leads, contacts and schedules
- Demonstrated knowledge or interest in learning about weatherization or home heating system upgrades
- Demonstrated organizational skills and reporting experience
- Ability to represent and facilitate stakeholder discussions related to residential heating system upgrades
- Ability to accomplish work with allocated budget

**Total points**

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Points</th>
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<tbody>
<tr>
<td>Ability to provide a local presence in Oakridge and Westfir</td>
<td>30 pts</td>
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<tr>
<td>Demonstrated ability for community engagement</td>
<td>20 pts</td>
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<tr>
<td>Demonstrated capacity to manage large volume of leads, contacts and schedules</td>
<td>10 pts</td>
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<tr>
<td>Demonstrated knowledge or interest in learning about weatherization or home heating system upgrades</td>
<td>10 pts</td>
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<td>Demonstrated organizational skills and reporting experience</td>
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<tr>
<td>Ability to represent and facilitate stakeholder discussions related to residential heating system upgrades</td>
<td>10 pts</td>
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<tr>
<td>Ability to accomplish work with allocated budget</td>
<td>10 pts</td>
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7. **SCHEDULE FOR SELECTION PROCESS**

<table>
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<tr>
<th>Request for Submissions Timetable</th>
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<tbody>
<tr>
<td>RFP Issued</td>
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<tr>
<td>Pre-Proposal Conference Call at 10:00am</td>
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<tr>
<td>Request for Clarification Due (if applicable)</td>
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<tr>
<td>Response to Clarification Due (if applicable)</td>
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<tr>
<td>Submission Due by (Closing)</td>
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<tr>
<td>Evaluation Period</td>
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<tr>
<td>Issue Notice of Intent to Award</td>
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<td>Contract award</td>
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4:00pm local time is the targeted timing for all dates included above except for the 10:00am Pre-Proposal Conference.

Prospective contractors may contact Nasser Mirhosseyni by email at nmirhosseyni@lrapa.org for further information regarding this process or to request clarification. All inquiries and corresponding responses will be available to all participants and will be posted on the LRAPA website.

8. INSTRUCTIONS TO PROSPECTIVE CONTRACTORS

Prospective contractors shall complete Attachment A: Submission Form for Prospective Contractors. Each submission must include one (1) original signed submission in an electronic copy (PDF format), clearly marked “Oakridge Air Residential Upgrade Coordinator RFP. Please keep the submission to no more than five pages of text that respond to Attachment A. Resumes are not included in the page limit. The submission must be received no later than 4pm, local time, June 24, 2020 at the following email address: nmirhosseyni@lrapa.org

The Oakridge Air Residential Upgrade Coordinator RFP document can be found on the LRAPA website at http://www.lrapa.org/311/PurchasingContracts.

9. LATE SUBMISSIONS NOT CONSIDERED

Submissions must be received by the date and time specified at the address listed above. Any Submission received after the deadline will not be considered. Faxed or emailed submissions will not be accepted.

10. ADDENDA to RFP

In the event that it is necessary to amend, revise, or supplement any part of the RFP, addenda will be posted on LRAPA’s website at http://www.lrapa.org/311/PurchasingContracts where the document titled City of Oakridge Air Program). LRAPA will make a reasonable effort to provide the addenda to all Proposers to whom LRAPA provided the initial Submission. This includes the amendment of dates in the Schedule for Selection Process. Any addenda so issued are to be considered part of the specifications of the Submission. LRAPA is not responsible for any explanation, clarification, interpretation or approval made or given in any manner except by written addenda issued LRAPA. In case of any doubt or differences of opinion as to the services to be furnished hereunder, or the interpretation of the provisions of the Submission, the decision of LRAPA shall be final and binding upon all parties.

11. CONTRACT

The successful Contractor will be expected to enter into a professional services contract with LRAPA. The contract will specify the extent of services to be rendered, the means and methods of providing the services, and the amount of compensation.
12. LRAPA SELECTION DISCRETION

LRAPA reserves the right to reject any or all bids and to waive irregularities and informalities in the selection process. LRAPA further reserves the right to negotiate, amend, and refine Submissions in consultation with the prospective Contractor.

13. SUBMISSION OWNERSHIP

All material submitted by the Submitters shall be considered property of LRAPA, and LRAPA will not be required to return same to any submitters. The material provided by Submitters will be treated in the same manner as the LRAPA’s own records.

After opening, all Submissions become part of the public record unless exempt under Oregon Public Records Law. Submitters wishing to exempt appropriate portions of their Submission from disclosure as public records are encouraged to discuss their concerns with LRAPA’s Procurement Manager (address listed below) prior to the submission.

Nasser Mirhosseyni, Finance/HR Manager
LRAPA
1010 Main Street
Springfield, OR 97477

14. EXCEPTIONS TO RFP

If, for any reason, a Contractor should find fault with the structure of this RFP or with the evaluation process, concerns may be submitted in writing to:

Nasser Mirhosseyni, Finance/HR Manager
LRAPA
1010 Main Street
Springfield, OR 97477
Phone: (541) 736-1056
nmirhosseyni@lrapa.org

LRAPA will make every effort to answer questions and, if warranted, to amend the RFP. Responses to questions and amendments to the RFP will be posted on the LRAPA website http://www.lrapa.org/311/PurchasingContracts. Submitters who are unable or unwilling to meet any of the requirements of this RFP must include, as part of their response, written exceptions to those requirements. Such request shall be delivered on or before noon local time May 27, 2020.

15. COMMENTS PROCEDURE

A prospective Contractor may deliver to Nasser Mirhosseyni, a written request for change to any of the specification listed in this RFP. This request must be delivered no later than noon local time May 22, 2020.

A written request for change shall include:
• A detailed description of the legal and factual grounds for the request;
• A description of the resulting prejudice to the prospective Contractor and
• A statement of the form of relief requested or any bid changes to the specifications.
LRAPA will review the specification change request and notify the prospective Contractors of the decision in writing prior to the closing date. To the extent possible, LRAPA will notify other prospective Contractors of any changes or modifications to the RFP.

16. PROTEST PROCEDURE

Any Contractor who has submitted a Submission to LRAPA and who is adversely affected by the LRAPA’s award of the Contract to another Contractor has seven (7) days after issuance of the Notice of Intent to Award the Contract, to submit a written protest of the award to LRAPA. This right to protest shall conform to the written requirements of OAR 137-047-0740 and specify the grounds upon which the protest is based.

An adversely affected Contractor must exhaust all avenues of administrative relief and review before seeking judicial review of LRAPA’s Contract award. Concerns must be submitted to:

Oakridge Air Program  
Travis Knudsen  
Public Affairs Manager  
LRAPA  
1010 Main Street  
Springfield, OR 97477

17. COST OF SUBMISSION

LRAPA is not liable for any costs incurred by submitters for the preparation and presentation of their Submission. This includes any costs in the Submission of proposal or in making necessary studies or designs for the preparation thereof.

18. AMERICAN WITH DISABILITIES ACT COMPLIANCE

If any respondent requires special assistance or auxiliary aids during the Submission, evaluation or award process, please contact Debby Wineinger, 541.736.1056 at least two (2) business days prior to the required assistance. TTY users dial Oregon Relay Services at 711.
ATTACHMENT A

SUBMISSION FORM FOR PROSPECTIVE CONTRACTORS

1. Contractor Team Description:
Please provide background on each member of your team, including brief bios, expected role in the project and any other relevant information that best highlights the team’s strengths as relates to this project.

2. Resumes of the Team Members:
Please provide listing of similar projects completed with minimum of two and maximum of five projects completed.

3. Contractor Qualifications
Please describe your individual or team capacity to complete the following project elements:

- Ability to provide a local presence and serve residents in Oakridge and Westfir
- Demonstrated ability for community engagement including customer service, education and in-person outreach work and problem solving
- Demonstrated capacity to manage large volume of leads, contacts and schedules
- Demonstrated knowledge or interest in learning about weatherization or home heating system upgrades
- Demonstrated organizational skills and reporting experience
- Ability to represent and facilitate stakeholder discussions related to weatherization and residential heating system upgrades
- Ability to accomplish work with allocated budget

4. Project Approach
In two pages, please describe how you or your team will approach this work, given your unique background and experience to deliver a residential heating upgrade program in Oakridge and Westfir.

5. References
Please provide three to five references for current or past work demonstrated your capacity to complete this work.