

LANE REGIONAL AIR PROTECTION AGENCY (LRAPA)



COVER PAGE

Oakridge Air
Targeted Airshed Grant
Residential Auditor
(TAG Auditor)

Request for Proposal (RFP)

RFP # LRAPA-01-23-1 TAG1 & TAG2

Date of Issue: March 6, 2023

Closing Date: March 31, 2023 4:00PM PDT

Single Point of Contact (SPC): Amanda Atkins

Address: 1010 Main Street, Springfield, OR 97477

Phone (voice) (541) 736-1056

Phone (fax) (541) 726-1205

E-mail: amandaatkins@lrapa.org

1. PROJECT OVERVIEW

The Lane Regional Air Protection Agency, (“LRAPA”), is seeking Proposals from qualified entities for a third-party Targeted Airshed Grant Auditor (“TAG Auditor”) (“Services”) as described in the RFP. The third-party TAG auditor is a contract position and will provide initial residential weatherization audits and final quality control inspection (QCI) in the implementation of the Oakridge Air program’s heating upgrades program funded through the U.S. Environmental Protection Agency’s (EPA) Oakridge Targeted Airshed Grant (TAG) program for the TAG 1 and TAG 2 grant programs. The Auditor will coordinate with the Oakridge Air program’s Residential Upgrade Coordinator and Oakridge Air program managers, Good Company - a division of Parametrix.

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 moved 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 ($\mu\text{g}/\text{m}^3$). This progress is due to community stakeholders working programmatically and individually to improve air quality. The community is currently in a 10-year maintenance plan period.

The overall project intent is to advance the reduction of particulate matter over a period of 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 $\mu\text{g}/\text{m}^3$. 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 overall Oakridge Air program (oakridgeair.org/) is planned for a seven-year period going through 2027. The pace of work is subject to variables within and outside the scope of the Residential Energy Efficiency Auditor’s control; therefore, the outcomes of heating upgrade interventions (weatherization, woodstove upgrades and ductless heat pumps) are the primary condition for the pace of the program. In total, 515 interventions will be made amongst the three types of heating upgrades and it is unlikely that all three will be made in each residence.

We anticipate that the contract payment for delivery of the audits and quality control inspections will be based on the ability to group multiple residences to maximize efficiency. The RUC attempts to schedule residential work in coordinated blocks of two or more homes. We also expect that workload will shift based on season and timing of program interventions.

3. CONTRACTOR REQUIREMENTS AND PREFERENCES

LRAPA is seeking an individual or company to provide the professional services to address the following aspects of the auditor responsibilities (“TAG Auditor”):

- Perform initial audit of the residence to determine the need for weatherization or small home repair (e.g., electrical panel upgrades) and ensuring that all reporting for US EPA is complete.
- Following residential heating upgrades, weatherization and related work, conduct final quality inspection to ensure residential upgrade work is completed satisfactorily to ensure project closeout and contractor payment.
- Current home inspection certification.
- Adhere to safety requirements from OSHA and CDC to protect oneself and residents.
- Ability to identify lead and/or asbestos in the residence that would require abatement/mitigation.
- Oversee auditing program costs, payments and reporting on a monthly and quarterly basis.
- Coordinate with other project partners such as Oakridge Air, City of Oakridge, Good Company - a division of Parametrix, the school district and the overall program coordinators.

The ideal TAG Auditor candidate or team has the following capabilities:

- Capacity to manage large volume of projects and schedules.
- Skilled communication and is comfortable working with people in their homes.
- Collaboration skills to coordinate and work within a larger community effort.
- Capacity to complete quality control inspection (QCI) on 100% of residences being served by the program interventions.
- Skills in ensuring quality control and identifying technical issues based on contractor delivery.
- Familiarity with communities of Oakridge and Westfir.

4. ELIGIBILITY

All individuals or companies with experience in this field are eligible for selection.

Insurance Requirements:

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

5. COMPENSATION

Compensation for the TAG Auditor will be based on the delivery of initial audits and quality control inspections and the number of residences and heating upgrade interventions addressed. There is adequate funding from the EPA funded Oakridge Air program to cover this auditor and QCI work, however, we know that the timelines and costs will be dependent on the structure and timing of audits and inspections. We request that prospective contractors identify the range

of prices that would be charged based on individual residence delivery versus multiple residences per trip. These projected prices should be included in the submission (Appendix A).

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

- | | |
|---|----------------|
| • Demonstrated ability to deliver audits and quality control inspections. | 30 pts |
| • Demonstrated capacity to complete work in the Oakridge area | 20 pts |
| • Demonstrated knowledge per project experiences/references | 20 pts |
| • Demonstrated organizational skills and reporting experience | 10 pts |
| • Ability to accomplish work within the budget limits | 20 pts |
| Total points | 100 pts |

7. SCHEDULE FOR SELECTION PROCESS

Request for Submissions Timetable	
RFP Issued	March 6, 2023
Pre-Proposal Zoom Conference Call at 10 am <i>Join here: https://us02web.zoom.us/j/88443154518</i>	March 9, 2023
Request for Clarification Due (if applicable)	March 17, 2023
Response to Clarification Due (if applicable)	March 24, 2023
Submission Due by (Closing)	March 31, 2023
Evaluation Period	April 7, 2023
Issue Notice of Intent to Award	April 14, 2023
Contract Award	April 21, 2023
4 pm local time is the targeted timing for all dates included above except for the 10 am Pre-Proposal Conference	

Prospective contractors may contact Amanda Atkins by email at amandaatkins@lrpa.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 TAG Auditor**”. 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 4 pm, local time, March 31, 2023 at the following email address: amandaatkins@lrpa.org

The Oakridge Air TAG Auditor RFP document can be found on the LRAPA website at <https://www.lrapa.org/air-quality-protection/about-lrapa/purchasing-and-contracts>.

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 <https://www.lrapa.org/air-quality-protection/about-lrapa/purchasing-and-contracts> where the document titled **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.

Amanda Atkins, Finance/Grants Analyst
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:

Amanda Atkins, Finance/Grant Analyst
LRAPA
1010 Main Street
Springfield, OR 97477
Phone: (541) 736-1056
amandaatkins@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 <https://www.lrapa.org/air-quality-protection/about-lrapa/purchasing-and-contracts>. 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 at or before noon local time on March 9, 2023.

15. COMMENTS PROCEDURE

A prospective Contractor may deliver to Amanda Atkins, 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 March 13, 2023.

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 five (5) 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 strengths as they relate 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:

- Demonstrated ability to deliver audits and quality control inspections.
- Demonstrated capacity to complete work in the Oakridge area.
- Demonstrated knowledge in weatherization and home heating system upgrades.
- Demonstrated organizational skills and reporting experience.
- Capacity to maintain safety for personnel and residents during the current COVID-19 pandemic.
- Ability to accomplish work within allocated budget and describe the cost differences of project delivery (e.g., travel time based on project batching, age of home, interventions assessed such as wood stove/chimney, weatherization, ducted/ductless heat pumps).

4. Project Approach

In one to two pages, please describe how you or your team will approach this work, given your unique background and experience to deliver as auditors and inspectors for this 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.