



Kathy Hochul, Governor

Homes and Community Renewal

RuthAnne Visnauskas, Commissioner/CEO

Request for Mini-Bids for Weatherization Training and Technical Assistance Services

Request for Bids Issuance Date:

May 1, 2024

Bid Submission Deadline:

May 20, 2024, 2024, 12pm, EDT

HOUSING TRUST FUND CORPORATION

Hampton Plaza | 38-40 State Street | Albany, NY 12207

www.hcr.ny.gov

Bid Checklist

CHECKLIST FOR REQUIRED FORMS AND RELATED ITEMS TO BE COMPLETED AND RETURNED WITH YOUR BID SUBMISSION:

- TAB 1 – Bid Coversheet, Cover Letter & Certification, attached hereto as Attachment 1
- TAB 2 – Technical Bid
- TAB 2 – Additional Attachments (not included in 5-Page Limit)

- Resumes for Bidder’s principals and training staff and staff of Bidder’s subcontractors, listed in the Bid Narrative
- Flow charts or other supporting materials, referenced in the Bid Narrative

- TAB 3 – Cost Proposal Form for CTS Training Bidders (utilizing template in **Exhibit A.1**) *and/or*
- TAB 3 – Cost Proposal Form for STS Training Bidders (utilizing template in **Exhibit A.2**)

- TAB 4 - Administrative Forms
 - [Vendor Information Form](#)
 - [Lobbying Procurement Law Form 1](#)
 - [Lobbying Procurement Law Form 2](#)
 - [Non-Collusive Bidding Certification Form](#)
 - [Vendor Assurance of No Conflict of Interest and Detrimental Effect](#)
 - [EEO Staffing Plan, PROC-1,](#)
 - [Utilization Plan, PROC-2,](#)
 - [Request for Waiver Form, PROC-3](#)
 - [MWBE & EEO Policy Statement, PROC-4,](#)
 - [Company Demographic Profile, PROC-7,](#)
 - [EEOC Statement, PROC-8,](#)
 - [Diversity Practices Questionnaire, PROC-9,](#)
 - [Certification of Good Faith Efforts, PROC-10](#)

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**NEW YORK STATE
HOUSING TRUST FUND CORPORATION (HTFC)**

**REQUEST FOR BIDS AND STATEMENTS OF QUALIFICATIONS FOR
WEATHERIZATION TRAINING AND TECHNICAL ASSISTANCE SERVICES**

RESPONSES FOR THIS SOLICITATION ARE LIMITED TO FIRMS ON HTFC'S
PREQUALIFIED LIST OF FIRMS FOR
TRAINING AND TECHNICAL ASSISTANCE SERVICES

IMPORTANT NOTICE: A Restricted Period under the Procurement Lobbying Law is currently in effect for this Procurement and will remain in effect until the State Comptroller approval of the Contract(s). Bidders are prohibited from Lobbying Law Contacts related to this Procurement with any New York State employee other than the Designated Contact listed below.

Designated Contact: Michael Vayser at Michael.Vayser@hcr.ny.gov

If you have inquiries regarding this request for bid or would like to contact the New York State Housing Trust Fund Corporation regarding issues not relating to Lobbying Law Contacts, please forward inquiries via electronic email to Monika Lekarczyk and Vanessa Lepe-Mora at ContractUnitInfo@hcr.ny.gov

1. Introduction

[New York State Homes and Community Renewal](#) (“**HCR**”) consists of all the major housing and community renewal agencies of the State of New York (“**State**” or “**NYS**”), including the New York State Housing Trust Fund Corporation (“**HTFC**” or “**Corporation**”). HTFC includes other agencies not involved in this request for bids and statement of qualifications (“**RFB**”) process.

HCR’s Housing Trust Fund Corporation was established as a subsidiary public benefit corporation of the New York State Housing Finance Agency. HTFC’s mission is to further community development through the construction, development, revitalization and preservation of low-income housing, the development and preservation of businesses, the creation of job opportunities, and the development of public infrastructures and facilities. HTFC is administering the Bipartisan Infrastructure Law (BIL) Training and Technical Assistance (TTA) program on behalf of Division of Homes and Community Renewal (DHCR).

Visit HCR’s website at www.hcr.ny.gov for more information about HTFC and its HCR affiliated agencies.

2. Purpose

The purpose of this RFB is to solicit bids from qualified training and technical assistance providers (**“Bidders” or “Firms”**) on HTFC’s prequalified list of training providers for the provision of weatherization training and technical assistance services relating to the residential energy conservation efforts of HTFC’s New York State Bipartisan Infrastructure Law Weatherization Assistance Program (**“WAP” or “Program”**).

This RFB outlines the terms and conditions, and all applicable information required for submission of a bid. To prevent possible disqualification and to ensure compliance with the requirements of the RFB, Bidders should pay strict attention to the Bid Submission Deadline indicated in the Calendar of Events and Milestones section of this RFB and follow the format and instructions contained herein.

3. HTFC’s Bipartisan Infrastructure Law Weatherization Assistance Program (BIL WAP)

The New York State Weatherization Assistance Program assists income-eligible families and individuals by reducing their heating and cooling costs and addressing health and safety issues in their homes through energy-efficiency measures. Weatherization services reduce the amount of energy required to heat and cool homes and provide hot water, thus reducing energy consumption, while minimizing the impact of higher fuel costs on low-income families. Household energy-use reductions and resultant energy cost savings can be significant, with an average annual savings in excess of 20%.

The Bipartisan Infrastructure Law (BIL) was enacted on November 15, 2021, with the US Department of Energy releasing specific guidance under Weatherization Program Notice BIL 22-1 on March 30, 2022. New York State DHCR’s Weatherization Assistance Program (WAP) will distribute \$289,714,086 of BIL funds for the purpose of enhancing energy efficiency to provide relief from high energy burden through savings and improvements to the homes of low-income families in the most disadvantaged communities. In addition to lowering energy costs and reducing carbon emissions, this funding will significantly expand employment opportunities within weatherization and expand workforce training opportunities for green jobs. New York’s plan for the use of BIL funds is consistent with the policies and strategies of the NYS Weatherization Assistance Program. To address the increase in funding and the need to expend BIL funds in a manner consistent with the BIL requirements, DHCR and HTFC will administer an expanded weatherization program.

WAP is the largest residential energy conservation program in the country. The Program receives funding from the United States Department of Energy (**“DOE”**) and the United States Department of Health and Human Services (**“HHS”**). WAP services are available in each of sixty-two (62) counties

within the State of New York. Since the inception of the WAP in 1977, more than 695,000 dwelling units have been assisted in the State. Priority for WAP activities is given to households with children, the elderly, persons with disabilities and those with high energy costs. The WAP is administered in New York State by DHCR through its Office of Housing Preservation and administered nationally by DOE.

WAP services are provided in each of the State's counties and delivered through a statewide network of non-profit service providers with expertise in energy conservation ("**Non-Profits**"). These Non-Profits provide a range of energy conservation services, from air sealing and insulating single family homes to replacement of heating systems in large apartment buildings. The Program assists all types of housing units including single and multi-family housing, manufactured housing, and group homes. DHCR is responsible for the overall monitoring and oversight of the WAP and provides an ongoing training program to maintain a high level of quality. DHCR's existing network of Weatherization assistance providers includes community-based not-for-profit organizations, community action agencies, county government agencies, and units of local government (**collectively, the "Network"**). The WAP also helps reduce energy costs of affordable housing developed or supervised by HCR.

Assignment of work under the contracts resulting from this RFB process will be further segregated into two primary training areas: (1) **Comprehensive Training Services ("CTS")** and (2) **Specific Training Services ("STS")** (collectively "**Training and Technical Assistance Services" or "T&TAS"**). The T&TAS Unit at DHCR adheres to the [NYS WAP Policy and Procedures Manual](#), hyperlinked herein.

Bidders may submit a bid to provide only Comprehensive Training Services, only Specific Training Services, or both.

The successful Bidder(s) will be expected to work cooperatively with DHCR's T&TAS Unit as well as with any other Training and Technical Assistance Services provider to provide the Scope of Work outlined in the Scope of Services section of this RFB.

Visit HCR's website at <https://hcr.ny.gov/become-weatherization-provider> for further information relating to the Program.

4. Assessment of Practices relating to Diversity and Service-Disabled Veteran Owned Business Enterprises ("SDVOBs")

The Contract(s) resulting from this RFB will be funded with federal funds. New York State Executive Law Article 15A ("**Article 15-A**"), Veterans' Services Law ("**Article 3**") and the DOE Financial Assistance Rules at 2 CFR200.321 ("**DOE Rules**"), require HTFC to undertake efforts to utilize minority- and women-owned business enterprises ("**MWBEs**") and service-disabled veteran-owned business enterprises ("**SDVOBs**"), whenever possible. The successful Bidder(s) will provide training

and technical support to the Network to maintain and improve Program compliance with the objectives of New York State’s MWBE and SDVOB participation goals.

4.1 Minority and/or Women Owned Business Enterprise (“Diversity”) Participation

Pursuant to Article 15-a and the DOE Rules, HTFC recognizes its obligation to promote opportunities for maximum feasible participation of certified MWBEs, and the employment of minority group members and women in the performance of all State and Federally funded HTFC contracts. HTFC is committed to awarding contracts to firms that are dedicated to diversity and provide high-quality services. MWBEs certified in NYS, or any other city or state of the federal government, are encouraged to submit bids in response to this RFB.

For purposes of this solicitation, HTFC hereby establishes an overall goal of 30% for MWBE participation for the contract(s) resulting from this RFB process, 15% for minority-owned business enterprises (“MBEs”) and 15% for women-owned business enterprises (“WBEs”).

4.2 Service-Disabled Veteran-Owned Business Enterprise Participation

Pursuant to Article 3 and the DOE Rules, HTFC recognizes its obligation to promote opportunities for maximum feasible participation of certified SDVOBs in the performance of all State and Federally funded HTFC contracts. HTFC is committed to awarding contracts to bidder(s) that are dedicated to SDVOBs and provide high-quality services. SDVOBs certified in NYS, or any other city or state of the federal government, are encouraged to submit bids in response to this RFB.

For purposes of this solicitation, HTFC hereby establishes a goal of 6% for SDVOB participation for the contract(s) resulting from this RFB process.

4.3 MWBE and SDVOB Partner/Subcontractor Interest

MWBEs and SDVOBs certified in NYS, or any other city or state of the federal government, may request that their firm’s contact information be included on a list of MWBE and SDVOB firms interested in serving as a partner or subcontractor for this RFB. The listing will be publicly posted on the [Agency’s website](#), hyperlinked herein for reference by the bidding community. A firm requesting inclusion on this list should send contact information and a copy of its MWBE certification and/or SDVOB certification to Nyhomes.proposal@hcr.ny.gov. Nothing prohibits an MWBE or a SDVOB firm from proposing as a prime contractor.

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5. Calendar of Events and Milestones

It is anticipated that a Contract(s) will be awarded in response to this RFB process based on the following schedule:

Event	Date
Issuance of RFB	May 1, 2024
Deadline for RFB Questions	May 7th, 2024 3pm, Eastern Daylight Time (“EDT”)
Deadline for Responses to RFB Questions	May 13 th , 2024 5pm EDT
Bid Submission Deadline	May 20th, 2024 12pm, EDT
Notification for Interview to Selected Bidders (if needed)	Week of June 3, 2024
Interview for Selected Bidders (if needed)	Week of June 10, 2024
Anticipated Notification of Selection*	June 21, 2024
Anticipated Date for Execution of the Contract(s)	June 28 th , 2024

The Agency reserves the right to modify this schedule at its discretion.

Notification of changes in connection with this RFB will be made available to all interested parties via the Agency’s website at: <https://hcr.ny.gov/procurement-opportunities>.

It is the responsibility of the Bidder to check the web site for notifications relating to this RFB.

6. Bidder Inquiries/Revisions to this RFB

Questions or requests for clarification regarding this RFB should be submitted via email, citing the RFB page and section to Monika Lekarczyk and Vanessa Lepe-Mora at ContractUnitInfo@hcr.ny.gov on or before the specified Deadline for RFB Questions cited in the Calendar of Events and Milestones section of this RFB.

Questions will not be accepted orally, and any question received after the deadline will not be answered. The comprehensive list of questions/requests for clarifications and the official Agency responses will be posted to HCR’s website.

In the event that it becomes necessary to clarify or revise this RFB, such clarification or revision will be made by addendum and posted to the Agency's website at <https://hcr.ny.gov/procurement-opportunities>. Any addendum to this RFB will become part of this RFB and part of any contract awarded as a result of this RFB process.

Further, a Bidder who discovers any ambiguity, conflict, discrepancy, omission, or other error in this RFB, should immediately notify the Agency of such error and request clarification or modification to the document. HTFC shall make RFB modifications by addendum, provided that any such modifications would not materially benefit or disadvantage any particular Bidder.

If a Bidder fails to notify the Agency of a known error or an error that reasonably should have been known, prior to the Bid Submission Deadline, the Bidder shall assume the risk. If awarded the contract, the Bidder shall not be entitled to additional compensation or time by reason of the error or its late correction.

There are no designated dates for release of addenda. Interested Bidders should check the Agency's website on a daily basis from the time of RFB issuance through the Bid Submission Deadline for updates. It is the sole responsibility of the Bidder to be knowledgeable of all addenda related to this procurement.

7. Minimum Qualifications

The Bidder shall meet the following minimum requirements and submit necessary information with their Bid Submission. Failure to comply with these requirements shall constitute grounds for rejection of the Bid. The Agency reserves the right to determine that the Bidder has substantially met all the RFB requirements and to request additional information from the Bidder.

To be a qualified Bidder for this RFB, the Bidder must certify that it (i) possesses experience within the last five (5) years providing services to those described in the Scope of Services section of this RFB, (ii) has the capacity to provide classroom training, in-person and via distance learning platforms, as well as provide field training and technical assistance on weatherization job sites and in Agency office settings, (iii) has its own website, accessible to all Network and New York State staff, with the capacity to host program materials, providing access to a BIL WAP online training calendar, sub-grantee / employees training history, certifications and Continuing Education Credits (“CEU”) earned, any certification expiration information and other WAP-related tools or links, such as an Energy Factor calculator or the Weatherization Assistance Program Technical Assistance Center (“WAPTAC”), and (iv) has the ability to provide the training and technical assistance activities described herein in NYS.

The Bidder, whether electing to bid on CTS or STS, must provide proof they have experience delivering the Weatherization Lead Safe Work (“LSW”) minimum standards training curriculum developed in partnership with DOE. The Bidder must also provide proof they are an existing Building

Performance Institute (“**BPI**”) Test Center. BPI Test Centers offer BPI online and field exams and then submit the exam results to BPI. BPI Test Centers provide their own proctors, modern facilities, equipment and serve as CEU providers. Bidder(s) for this RFB must be able to provide CEUs to training participants for BPI certification purposes.

7.1 Minimum Qualifications for Comprehensive Training Services (CTS) Bidders

Comprehensive Training Services Bidder(s) shall demonstrate and furnish evidence of the following Minimum Qualifications within the Bid Submission. To summarize, CTS Bidder(s) must demonstrate:

- A. its ability to provide the training and technical assistance activities described herein in NYS;
- B. at least five (5) years of experience delivering Training and Technical Assistance Services similar to those described in the Section 8 of this RFB;
- C. that they are currently, and will remain throughout the contract term, an Interstate Renewable Energy Council (“**IREC**”) accredited training provider for the National Renewable Energy Laboratory (“**NREL**”) Quality Control Inspector (“**QCI**”) title;
- D. that they are currently, and will remain throughout the contract term, an accredited trainer of the Environmental Protection Agency (“**EPA**”) trained to provide Lead Renovation, Repair and Painting (“**RRP**”) initial certification training;
- E. that they are currently, and will remain throughout the contract term, an authorized trainer of the Occupational Safety and Health Administration (“**OSHA**”), as authorized by the OSHA Office of Training and Education to deliver the ten (10) hour safety course specified in the Scope of Services section of this RFB;
- F. proof that they have experience delivering the LSW minimum standards training curriculum developed in partnership with the DOE;
- G. certification showing that the CTS Bidder’s facility is certified as a BPI Test Center; and its capacity to provide online services through its own website, the ability to maintain a listing and calendar of all training available for the calendar year by BIL WAP T&TAs providers, which must be accessible to the sub-grantee network and HTFC, while notifying both of upcoming training at least thirty (30) days in advance of it being offered.

All required certifications and credentials must be maintained throughout the life of the Contract.

7.2 Minimum Qualifications for Specific Training Services (STS) Bidders

Specific Training Services Bidder(s) shall demonstrate and provide evidence of the following Minimum Qualifications within the Bid Submission. To summarize, STS Bidder(s) must demonstrate:

- A. its ability to provide the training and technical assistance activities described herein in NYS;
- B. at least five (5) years of experience delivering Training and Technical Assistance Services similar to those described in the Section 8 of this RFB;
- C. its capacity to provide online services through its own website, the ability to maintain a listing and calendar of all training available for the calendar year by BIL WAP T&TAs providers, which must be accessible to the sub-grantee network and HTFC, while notifying both of upcoming training at least thirty (30) days in advance of it being offered;
- D. its capacity to maintain a statewide database of HTFC / BIL WAP training attended, and any certifications and CEUs earned by BIL WAP program staff, relative to recurrence and / or recertification deadlines, that sub-grantees and staff may reference at any time;
- E. its ability to host, promote and coordinate a three (3) day annual Statewide Technical Assistance Conference. The Conference facility location must be delivered by the Bidder, must be reasonably centrally located in NYS, accessible by common modes of transportation, must be American Disability Association (“ADA”) compliant and must have a seating capacity for a minimum of 100 conference participants;
- F. proof that they have experience delivering LSW minimum standards training curriculum developed in partnership with the DOE; and
- G. certification showing that the STS Bidder’s facility is certified as a BPI Test Center.

All required certifications and credentials must be maintained throughout the life of the Contract.

8. Scope of Services (“Scope of Work”)

The successful Bidder(s) (“Contractors”) will provide HTFC with Training and Technical Assistance Services relating to the residential energy conservation efforts of the New York State Bipartisan Infrastructure Law funded Weatherization Assistance Program. HTFC has developed [a training and technical assistance plan \(the “Training Plan”\)](#) for the BIL WAP as outlined in the hyperlink herein. The Contractor will provide Training and Technical Assistance Services in support of the Training Plan, as directed by HTFC staff.

The Contractor(s) will conduct and provide logistical support for HTFC-sponsored regional training and conduct regular training as requested and assigned by the BIL WAP T&TAS unit in accordance with the directives in this RFB. The Contractor will also submit monthly or quarterly reports to HTFC in formats to be agreed upon by the T&TAs unit, which detail training events, topics, instructors, attendance lists, recommendations and any other activities undertaken on behalf of the Program.

The Contractor(s) shall also submit all training curricula (handouts, power points, developed tools, etc.) utilized to the HTFC representative for review and / or approval before presenting training. Any training curricula, materials or tools developed under the awarded Contract(s) will be the property of HTFC and the BIL WAP.

The Contractor may also facilitate regional task force meetings to formalize and present the needs of the Network to HTFC. The Contractor(s) shall maintain a listing and calendar of all training available and being offered for the calendar year on their website, accessible to the BIL WAP sub-grantee Network and HTFC, notifying both of upcoming training at least thirty (30) days in advance of it being offered. The Contractor(s) will maintain a statewide database of HTFC mandatory training and certifications, relative to recurrence and / or recertification deadlines, that sub-grantees and staff may reference.

Bidders seeking to provide Training and Technical Assistance Services shall demonstrate their capacity to provide classroom training, in-person and via distance learning platforms, as well as provide field training and technical assistance on weatherization job sites and in Agency office settings. The training and technical assistance for BIL WAP sub-grantees and HTFC staff may take place at sub-grantee offices, training facilities, Weatherization job sites or other locations as determined by HTFC, utilizing the tools and equipment of the Contractor(s), when necessary. The Training and Technical Assistance Services will primarily be targeted to:

- A. Weatherization sub-grantee directors;
- B. Weatherization sub-grantee administrative staff;
- C. Energy auditors;
- D. Inspectors;
- E. Crew members (installers);
- F. Heating technicians; and
- G. New York State HTFC Weatherization staff.

The Training Plan includes comprehensive training for all BIL WAP workers, predominately aligned with the Job Task Analysis (“JTA”) for the position in which the worker is employed. The Training Plan addresses two distinct training categories: (1) Comprehensive Training Services (CTS); and (2) Specific Training Services (STS). The Bidder should be prepared and equipped with the necessary resources to immediately present training in the applicable training category for which they are submitting a Bid Submission.

Bidders must demonstrate that they meet or exceed the Minimum Qualifications in Section 7 of this RFB for the applicable category(ies) that they are proposing to provide services, while demonstrating their ability to provide the Training and Technical Assistance Services as more fully described in the Scope of Services section of this RFB, in NYS.

Additionally, Bidders must demonstrate their capacity to provide weatherization training and technical assistance services and have a history of providing Training and Technical Assistance Services to the community through the following training methods: (i) classroom training, (ii) in-person, (iii) via distance learning platforms, and (iv) training and technical assistance in the field at on-site locations.

Below is a list of descriptive areas of Comprehensive Training Services and Specific Training Services for which the Bidder shall demonstrate capacity, expertise, and readiness to implement the Training Plan. Each area is followed by a brief description of the scope of services for each area of Training and Technical Assistance Services. Bidders must indicate within their Bid Submission the training courses they can immediately provide, and those training areas in CTS and/or STS that they cannot immediately provide; including a timeline as to when adequate resources will be in place. The below descriptions should not be construed as immutable or exhaustive within each topic area.

8.1 Scope of Services for Comprehensive Training Services (CTS)

CTS is defined as comprehensive, occupation-specific training that follows a curriculum aligned with the JTA for that occupation. CTS must be administered by an entity that is accredited by a DOE-approved accreditation organization for the JTA being taught. The BIL WAP currently recognizes IREC and BPI as such an organization, dependent upon the specific training.

Bidders will be expected to provide CTS in the following categories of concentration (an asterisk denotes that the training course is mandatory for BIL WAP sub-grantees, relative to each job title):

A. CTS - Training Courses.

- (i) **Weatherization Health & Safety – WAP Directors, auditors, QCI, all crew and heating technicians** (1 day / Maximum of 16 – 20 participants) *
- (ii) **Heat Pump Installation and Maintenance Operator Training** (1 day/Maximum of 16-20 participants)
- (iii) **Manual J and Manual N Load Analysis** Training and Implementation (1 day/Maximum of 16-20 participants)
- (iv) **Grant Writing for Community Based Organizations** (3 day /Maximum of 16-20 participants)

- (v) **Managing Multiple Contracts Training** (2 days/Maximum of 16-20 participants)
- (vi) **Davis Bacon Compliance Training** (1 day/ Maximum of 16-20 participants)
- (vii) **Client Education and Outreach** (2 days/Maximum of 16-20 participants)
- (viii) **Weatherization Assistant Training** (1 day/Maximum 16-20 participants)

8.2 Scope of Services for Specific Training Services (STS)

STS are defined as single issue, short-term training to address identified areas of concern, in the field or classroom, and specialized topics that are essential to BIL WAP operations but not specifically included in CTS. This training can typically be provided either on an “as-needed” or pre-scheduled basis. A requirement to host, coordinate and promote the Statewide Technical Assistance Conference training is included in this STS category.

A. **STS - Training Courses.**

- (i) **Master Bidders’ List: Boiler Contractors - NYC only - For boiler plant subcontractors and sub-grantee field personnel working in buildings in New York City where large heating system work must be subcontracted.**
The Contractor(s) shall: a) conduct orientation sessions for new and existing boiler contractors that seek to be included on the "Weatherization Master Bidders List" for New York City; b) conduct marketing and outreach to recruit new contractors to invite to the orientation sessions; c) provide training to sub-grantee field inspectors that will consist of classroom and field instruction with a test to determine successful course completion; d) administer a contractor assessment questionnaire to sub-grantees to evaluate previous years’ experience with boiler contractors; e) collect and review contractor qualifications from all boiler contractors applying for participation in the BIL WAP; and f) develop and distribute to sub-grantees the master bidders’ list of contractors that are successful in meeting the qualification steps and eligible to submit bids for heating system replacement or major upgrades. (1 day / maximum of 10 - 12 participants)
- (ii) **Energy Factor Calculator** The Contractor(s) shall host and maintain an ‘energy factor calculator’, provided by HTFC, to be used by the weatherization Network. The Contractor(s) will be required to host the calculator on their website, keep heating degree day information updated, provide training on its use, and maintain the tool’s functionality and Network’s ability to access the calculator. (1 day / maximum of 10 - 12 participants)

- (iii) **Benchmarking Tool** The contractor may host and maintain a consultant to develop a benchmarking analysis tool for pilot programs and projects within weatherization with a publicly available dashboard.
- (iv) **Subgrantee Training on Key HTFC and DOE Regulations. The contractor shall host trainings on regulations and program management for new subgrantees and new directors, in addition to trainings on new regulations and program changes. (2 day/ Maximum of 16-20 participants)**
- (v) **Electrical Service Assessment** This course will provide subgrantees and field staff training on assessing and improving required electrical service for improvements. (1 day/Maximum of 16-20 participants)
- (vi) **Multifamily Auditor Mentoring – NYC Only (& Field)** This course shall support sub-grantees in reviewing, analyzing, and conducting energy audits of multifamily buildings under their BIL WAP contracts, particularly buildings that are 5 to 75 units, utilizing Energy Audit software; includes on-going mentoring and one-on-one training and technical assistance to sub-grantee staff designated by each agency as their lead multifamily energy auditor(s). This training is designed to increase sub-grantee multifamily energy auditing capacity, leading to agency ‘self-auditing status’ in accordance with HTFC BIL WAP policy. (Ongoing / candidates must be pre-approved)
- (vii) **Stove & Oven Maintenance** This training course will introduce weatherization professionals to the operation, maintenance, and service of convection ovens. Hands on props are to be utilized so that attendees can perform common servicing procedures presented in the course and become familiar with the tools used. (1 day / maximum of 10 - 12 participants)
- (viii) **Heating System Testing & Diagnostics** This training course will focus on completing steady state efficiency (“SSE”) tests on gas and oil-fired appliances and how to properly interpret the results in a manner consistent with HTFC’s policies and procedures. This training course must include procedures for conducting a visual health and safety inspection of the unit and surrounding areas, as well as an evaluation of the distribution system. (1 day / maximum of 8 - 10 participants)
- (ix) **Small Homes Auditing (& Field or Lab)*** This course will focus on training on data collection needs and the process for conducting the small homes audit in the field. This training must include entry of all diagnostic test results (SSE, blower door, and health and safety tests), measurements required to complete the audit, and how to collect as well as input the data into the system and generate accurate models. This training must also cover proper analysis of data

modeling output and developing a work scope. (3 - 5 days / maximum of 8 - 10 participants)

- (x) **BIL WAP Mobile Home Procedures (& Field or Lab)** This course will provide training on any or all the following HTFC BIL WAP procedures: (a) how to complete a proper audit on a mobile home; (b) how to properly evaluate air flow and perform air sealing in a mobile home; (c) insulation techniques for a wall, and for a belly vs. insulated skirting for a mobile home; and (d) techniques for blowing insulation in the ceiling area of a mobile home. (1 day / maximum of 4 - 8 participants)

- (xi) **BIL WAP Multifamily Construction Management – NYC Only (& Field or Lab)** On-site training on multifamily construction management requirements and best practices, so that sub-grantees and program staff will understand how to review and evaluate a multifamily building energy audit and to comply with HTFC’s requirements for receiving and reviewing in-progress assisted and /or completed buildings. This training must include procedures for multifamily post-inspection of installed appliances, lighting, lighting controls, roof and cavity insulation, windows, exterior doors, building envelope sealing, HVAC systems (combustion, steam, hydronic, pipe and duct and mechanical systems), energy management systems, health, and safety work common to multifamily buildings and other eligible multifamily work. (5 days / maximum of 8 - 10 participants)

- (xii) **BIL WAP Procurement Procedures** Training for sub-grantees on any or all procurement procedures that must be followed to meet State and Federal requirements. Topics to include contractual bidding requirements, use of statewide purchasing, and development of formal bid solicitations by the sub-grantee. (1 day / maximum of 10 - 12 participants)

- (xiii) **Statewide Marketing for Recruitment**

STS Bidders proposing to host marketing training and provide marketing resources for recruitment as the network expands to support the market.

- (xiv) **Workforce Development Training and Technical Assistance** STS bidders proposing to create internship surveys for subgrantees and administer a matching process with curriculum development support and a facility space user fee for partner universities. (3-day periodical training for 20-50 participants)

- (xv) **Buy American Training and Technical Assistance** STS bidders proposing to create BABA recommended source and materials and data collection tools.

The bidder will develop and provide mentoring and technical support for procurement and bidding in support of BABA requirements. (1 day training for 16-20 participants)

- (xvi) **Statewide Technical Assistance Conference – Peer-to-Peer Training: Annual Training & Technical Assistance Conference** STS Bidders proposing to host, coordinate and promote the three (3) day annual Statewide Technical Assistance Conference (“**Conference**”) must describe within their Delivery Plan the general approach that would be taken to host the Conference at a facility within the NYS area. Bidders should also give a detailed description of the methodology that would be used to develop and conduct the three (3) day Conference for BIL WAP sub-grantees, and any related organizations. Bidders may assume an attendance of a minimum of 100 Conference participants from across the Network, representing 52 sub-grantees from all parts of New York State, in addition to HTFC BIL WAP staff and representatives of other interested organizations. The three-day (3) Conference for the Network needs to offer BIL WAP training topics that can result in CEUs; review new, current, or revised DOE requirements or program procedures as well as techniques and best practices applied or discovered by the Program; to be paid in part by RFB funds and in part by Conference fees.

All classroom and field training will be reviewed and coordinated with the HTFC Training and Technical Assistance Unit. Copies of lesson plans and training aids utilized will be submitted to the HTFC T&TAS unit. All submissions will become the property of HTFC.

9. Bidder’s Delivery and Evaluation Plans

9.1 Delivery Plan

CTS and STS Bidders must include within their Bid Submission a comprehensive Delivery Plan which outlines their capacity, experience, and preparedness with the appropriate staffing resources to present the training curricula specified in the CTS and/or STS training categories identified in Section 8 of this RFB.

The Bid Submission shall document the Bidder’s methodology and approach to implementing a Delivery Plan to market the trainings, coordinate registration, and track attendance, as further outlined below:

- A. **Marketing and Promotion** – Bidder must describe how trainings will be marketed to the Agency’s Network as identified in the Scope of Services section.

- B. **Registration** – Bidder must describe the registration process. The description should include who will coordinate the registration process, how technology will be used, how the waiting list will be maintained and how long the registration period will be open for each training. The description should also include a process for late registrations, cancellations and procedures for over-flow registrations.
- C. **Attendance** – Bidder must describe how the organization will handle late arrivals, early departures for certification programs, and participants that fail to show up for training. Bidder(s) must provide a plan for the use of any fees collected for cancellations or no-shows.
- D. **Cancellation** – Bidder must provide a narrative about how training cancellations and postponements will be handled.
- E. **Notification for Certifications** – Bidder must describe how notifications will be made for passing and failing participants. Describe who will be notified and method of notification.

STS Bidders proposing to coordinate and promote the three (3) day Conference referenced in Section 8.2(A)(xvi) of this RFB must describe within their Delivery Plan the general approach that would be taken to successfully host the Conference, which shall include a description of the Conference facility, possible location, seating capacity and the STS Bidder’s experience hosting a Conference of similar size and scope.

9.2 Evaluation Plan

Both CTS and STS Bidders must submit an Evaluation Plan which incorporates the Bidder’s methodology and approach with respect to their evaluation and feedback mechanisms to ensure that the training efforts are on target.

- A. Bidder(s) must describe the Evaluation Plan from the perspective of the participant, the instructor, and the organization. In the Plan, Bidder(s) should consider evaluating the training results.
- B. Bidder(s) must include a narrative of how the evaluation results will be incorporated in to the program design.

9.3 Deliverables and Reporting

Bidder(s) will deliver the training activities outlined in Sections 8 and 9 of this RFB upon request by BIL WAP. Bidder(s) will deliver all lesson plans and training aids to be utilized to the BIL WAP T&TAs unit prior to presenting the training session. Bidder(s) will deliver any manuals, updates to manuals, variance requests and other written materials as requested or assigned.

Bidder(s) will submit a monthly or quarterly payment request, the frequency to be determined following the award, along with reports that provide detailed information on the specific training and technical assistance provided. Such reports may include progress determinations pertaining to training or mentoring provided and all reports will provide information on the numbers of instructional hours, contact hours and the numbers of participants in each type of training or course delivered during the reporting period, and specific recommendations that may be required of the provider dependent upon the assistance delivered or as requested by the BIL WAP T&TAs unit.

The formal structure of such reports and payment requests will be decided by HTFC following contract awards resulting from this RFB process. Any supporting documentation of invoices for payment accompanying reports shall be consistent and supportive of the other, detailing the labor and materials costs by training or services provided, identifying provider staff involved, by title and hourly rate, detailing the costs being charged to the WAP.

Additional tasks of Bidder(s) may include, but not be limited to:

- Provide a Delivery Plan and Evaluation Plan as outlined in Section 9 of this RFB;
- Provide an annual work plan, created in cooperation with the BILWAP T&TA Unit;
- Represent NYS BILWAP Sub-grantee Network concerns to HTFC;
- Perform BIL WAP Network and Community Outreach;
- Maintain a website;
- Maintain a training calendar;
- Maintain / provide support for an Energy Factor calculator;
- Maintain / provide support for an ASHRAE calculator;
- Provide notices for training and certifications;
- Provide Auditor mentoring and audit review;
- Field Demonstrations of BIL WAP techniques;
- Lab Demonstrations of BIL WAP techniques;
- Conference presentations on requested BIL WAP issues; and
- Organize BIL WAP sub-grantee network task force meetings.

10. Contents of Bids

A complete bid for this RFB is comprised of four (4) separate tabs: (i) Tab One: Application Cover Sheet, Cover Letter and Bid Certification; (ii) Tab Two: Technical Bid; (iii) Tab Three: Cost Proposal Form(s); and (iv) Tab Four: Administrative Forms

The Bid must be complete and prepared in the format consistent with the instructions provided in this RFB. In all instances, the Agency's determination regarding a bid will be final. Bids not organized in the manner prescribed in this RFB may be considered non-responsive at the Agency's sole

discretion. Bidders should not refer to other parts of the bid, to information that may be publicly available elsewhere, or to the Bidder's or other websites in lieu of answering a specific question.

The Bidder must submit a bid that clearly provides all the information required in this RFB. Emphasis should be made on conformance to the RFB instructions, responsiveness to the RFB requirements, and clarity of content. The Bidder is advised to thoroughly read and follow all instructions contained in this RFB. Bids that do not comply with these instructions, or do not meet the full intent of all the requirements of this RFB may be subject to scoring reductions during the evaluation process or may be deemed non-responsive.

The Agency does not require, nor desire, any promotional material that does not specifically address the response requirements in this RFB. Bids must demonstrate that the Bidder meets or exceeds the Minimum Qualifications specified in Section 7 of this RFB and is qualified to perform the Scope of Work based upon prior relevant professional experience. An Agency review committee will conduct a comprehensive review of each bid. Each Bidder is required to submit the information and documentation listed below in the order in which it is requested. A bid that does not include all the required information and completed forms may be subject to rejection.

The completed bid will include Tabs One through Four, as described in the Bid Submission Requirements section of this RFB. Each Tab must be bookmarked as "Tab 1," "Tab 2," "Tab 3," and "Tab 4" and must be presented in the exact order requested in this RFB. The content in Tab 2 must be limited to twenty (20) letter-size pages (single or double spaced, minimum 12-point font, and at least one-inch margins). The twenty-page limit in Tab 2 does not include resumes, references, organizational chart, etc.

The Bidder's bid must contain responses to the items listed below.

10.1 TAB 1: Bid Coversheet, Cover Letter & Bid Certification

Bidders shall submit, as part of their Bid Submission, the Bid Coversheet, Cover Letter and Bid Submission Certification, as outlined in the Appendices and Exhibits portion of this RFB.

10.1.1 Coversheet

Bidders shall complete and submit a Bid Coversheet which contains identifying information for the firm. The Coversheet must be submitted utilizing the template provided in Tab 1.

10.1.2 Cover Letter

The Bidder's Cover Letter must not exceed three (3) pages and must include:

- A. The Bidder's name, address, telephone number, fax number, email address and web site address, if applicable;
- B. A statement affirming the number of years that the Bidder or its principals have provided Training and Technical Assistance Services in the applicable training categories as described in the Scope of Services section of this RFB;
- C. The name(s) of the primary staff who will provide services to the Agency; and
- D. Indicate whether the Bidder wishes to provide CTS and/or STS or both;
- E. CTS Bidders must provide a detailed summary describing how your firm meets the Minimum Qualifications specified in Sections 7.1 A through G of the RFB. Clearly cite and include evidence of the Bidder's EPA, OSHA, BPI and IREC accreditations, membership in professional training organizations, training awards, citations, etc. All certifications and accreditations must be current and maintained throughout the life of the Contract.
- F. STS Bidders must provide a detailed summary describing how your firm meets the Minimum Qualifications specified in Section 7.2 A through G of the RFB. Clearly cite and include evidence of any certifications, accreditations, membership in professional training organization certifications, training awards, and citations cited in Section 7.2. All certifications and accreditations must be current and maintained throughout the life of the Contract.

10.1.3 Bid Certification

Bidders shall complete and submit with their Bid Submissions an original signed certification (“**Bid Certification**”) which affirms that the information contained in the bid is true and accurate and that the person signing the Bid Certification is authorized to submit the bid on behalf of the Bidder. The Bid Certification must be submitted utilizing the template provided in Attachment I.

10.2 TAB 2: Technical Bid

This section of the RFB provides instructions to Bidders regarding information that is to be included in the Technical Bid. Bids must be complete, factual, and as detailed as necessary to allow the Agency to adequately evaluate capabilities and experience.

The purpose of the Technical Bid is to provide the Bidder an opportunity to demonstrate its qualifications, competence, and capacity to undertake the services described in the Scope of Services section of this RFB, in a manner which complies with the requirements of this RFB. Bids must

specifically detail a Bidder's qualifications and experience in providing services sought by the Agency. Your response must include responses to the following items.

10.2.1 Overview and Experience

The Bidder must identify its subcontractor(s), if any. The Bidder must also provide the information in this section for its subcontractor(s), if any, and as applicable.

1. Provide a brief overview of your organization's experience and qualifications with respect to the Training and Technical Assistance Services. Describe your firm's professional experience and understanding of the DOE BIL WAP regulations and guidelines and HTFC's Training Plan. Describe your firm's approach to problem-solving issues which may arise during the term of the contract.
2. Demonstrate your firm's ability and experience to present training in all CTS and/or STS areas identified in the Scope of Services section of this RFB relative to your firm's submission. Identify which training modules your firm can immediately provide and identify those training modules that cannot be immediately provided. In the event that your firm cannot immediately provide some of the cited training modules, an explanation and timeline to provide them is required.
3. Describe your firm's familiarity with the BIL WAP and history of providing Training and Technical Assistance Services to the community through the following training methods: (i) classroom training, (ii) in-person, (iii) via distance learning platforms, and (iv) training and technical assistance in the field at on-site locations. Cite your firm's total years of cumulative experience in the preceding four training methods. Address the following questions: Why should HTFC select your firm? What can your firm do for HTFC that other firms cannot?
4. List between three (3) to five (5) engagements of similar size and scope within the last five (5) years that your firm has provided similar Training and Technical Services as those described in the Scope of Services section of this RFB. For each engagement, provide the following information:
 - (i) The name and location of the client;
 - (ii) Type of entity (government, private, etc.);
 - (iii) Dates of engagement;
 - (iv) Description of the services provided under the engagement;
 - (v) Describe any best practices or innovative techniques that were learned and/or applied under the engagement that may be useful in achieving outcomes listed in the Scope of Services section of this RFB; and

- (vi) Provide the name, title, and contact information for the individual that can provide a reference for the client and speak with authority to your firm's performance in the engagement.

10.2.2 Capacity

The Bidder must identify its subcontractor(s), if any. The Bidder must also provide the information in this section for its subcontractor(s), if any, and as applicable.

1. Identify the location of your firm's main office / test center. If there are other locations of your firm that will be involved in the Training and Technical Assistance Services, identify these other location(s) and include names/telephone numbers/email addresses of contact persons in these locations.
2. Identify the individuals from your firm's team who will be directly responsible for implementing and executing the Training Plan in each area. In addition, identify the individuals who will be conducting the training and providing technical support. For each staff member listed, provide the number of years of relevant experience, and attach a resume. Provide a flow chart describing how the work will be carried out among your staff.
3. Provide a statement that your firm is capable of providing the training and technical assistance activities, as described in the Scope of Services section of the RFB, to sub-grantees in NYS, including your firm's specific ability to provide training services for those topics which are specific to New York City.
4. Provide resumes for the instructional trainers who will staff the engagement. Provide an organizational chart for you and subcontractors, if any.

10.2.3 Approach to Meeting the Functional and Technical Requirements

1. All Bidders must include within its Bid Submission a detailed Delivery Plan, as outlined in Section 9.1 of this RFB for the applicable category(ies) for which they are submitting a Bid Submission.
2. All Bidders must include within its Bid Submission a detailed Evaluation Plan, pursuant to Section 9.2 of this RFB for the applicable category(ies) for which they are submitting a Bid Submission.
3. All Bidders must include within their Bid Submission a detailed plan as to how they intend to meet the Deliverables and Reporting requirements specified in Section 9.3 of this RFB for the applicable category(ies) for which they are submitting a Bid Submission.
4. Identify your firm's approach and the common procedures that would be involved in executing the Scope of Services.

5. Discuss how the approach will meet the requirements in the Scope of Work and include the methodology (i.e., approach, delivery plan, etc.).
6. Discuss how your firm will ensure the security of any Agency information received by your firm resulting from working on this engagement.
7. Describe the availability and type of support to be provided to the Agency.

10.2.4 Credentials and Accreditations

1. Provide copies of credentials requested in the Minimum Qualifications section of this RFB.
2. Provide evidence that your firm is currently an IREC-accredited training provider for the NREL QCI title.
3. Provide evidence of any additional IREC training provider accreditations in the Home Energy Professional (“HEP”) titles that your firm may possess.
4. Provide evidence of any current IREC and/or BPI certifications for trainers or training locations.

10.3 TAB 3: Cost Proposal Forms (Budget)

Tab 3 is comprised of the Cost Proposal Form(s) (“**Cost Proposal**” or “**Budget**”), attached hereto as Exhibit A.1 for CTS Bidders and Exhibit A.2 for STS Bidders. The Bidder must provide hourly rates for the specific itemized training categories listed in each Cost Proposal Form and fixed rates relating to estimated annual travel costs (and fixed costs for STS Bidders seeking to host the Statewide Technical Assistance Conference). Additional categories may not be added. Each Cost Proposal Form must be signed by an authorized signatory of your organization.

The “Hourly Rate” shall be considered inclusive of the components outlined below:

- A. where the Bidder is proposing to provide individual assistance in the field which requires travel outside of its facility to eligible applicants and recipients, the Hourly Rate shall include costs to complete the required assessment reports, prepare work programs, carry out work programs and prepare completion reports;
- B. where the Bidder is proposing to provide group / classroom training, the Hourly Rate shall include all costs for planning and delivery. The Hourly Rate shall include managing training logistics, such as room and / or equipment rentals, producing training materials, and managing a registration process;
- C. the Hourly Rate shall include staffing costs for each person proposed to work under the Contract. All invoices must include an actual number of hours the firm’s staff person has provided services to HTFC under the contract, and Hourly Rates by staff level;

- D. the Hourly Rate shall include personal services, fringe benefits, transportation costs for all travel involving trips of fewer than 100 miles roundtrip (to and from the training destination to the Bidder's main office location), lodging, meals, taxis, rental cars, and other expenses related to travel of any distance, and all auxiliary services such as printing, postage, copying, secretarial support and overhead. HTFC does not reimburse for these expenses as a separate item;
- E. for instances where it is required that the Contractor must hold Training and Technical Assistance Services in the field to eligible applicants and recipients, the Hourly Rate shall include hotel lodging, subject to HTFC's prior written authorization, and necessary transportation costs, which when provided by public transportation for trips exceeding 100 miles, shall be reimbursable as a separate item; and
- F. for travel that exceeds a roundtrip of 100 miles (to and from the field training destination to the Bidder's main office location), HTFC may choose to reimburse the provider for the cost of public transportation or ask the provider to drive, in which case the provider will be paid for half the round-trip travel time required for the trip. Otherwise, time spent in travel is not reimbursable.

In case of no event will reimbursement for travel be approved under the Contract for travel rates which exceed the per diem rates outlined in the [OSC Travel Manual](#) ("State Travel Guidelines"), hyperlinked herein. All rules and regulations associated with this travel can be found within the OSC Travel Manual.

The Contractor shall request prior written approval from HTFC for any travel that occurs during the term of the Contract. The Contractor is responsible for keeping adequate records to substantiate any claims for reimbursement, by personnel for travel in performance of the services.

10.4 TAB 4: Administrative Forms

Bidders are subject to the requirements indicated in the Agency's [Standard Clauses and Requirements for Solicitations](#), hyperlinked herein as Exhibit A. Such requirements include, but are not limited to, submission of the following information and forms: (a) [Vendor Information FORM](#); (b) [Lobbying Procurement Law FORM 1](#) and [Lobbying Procurement Law FORM 2](#) ; (c) [Non-Collusive Bidding Certification FORM](#); and (d) [Vendor Assurance of No Conflict of Interest and Detrimental Effect](#).

Bidders that are certified in NYS as an MBE, a WBE, an MWBE and/or a SDVOB should attach evidence of NYS certification. Bidders are also subject to Article 15-A and Article 17-B State law MWBE and SVDOB requirements. Such requirements include, but are not limited to, submission of the following information and forms, hyperlinked herein: (a) [EEO Staffing Plan, PROC-1](#); (b) [Utilization Plan, PROC-2](#); (c) [MWBE & EEO Policy Statement, PROC-4](#); (d) [Company Demographic Profile PROC-7](#); (e) [EEOC Statement, PROC-8](#), applicable to Bidders with 15 or more employees; (f) [Diversity Practices Questionnaire, PROC-9](#) and if applicable, [Request for Waiver Form, PROC-3 form and Certification of Good Faith Efforts -PROC-10](#)

In addition to completion of the forms hyperlinked in the paragraph above, Bidders must provide all other information indicated in this Section 11.4 for Tab 4.

10.4.1 Licenses, Certifications, and other Credentials

The Bidder must respond affirmatively that it, and its subcontractors (if any), will have, prior to commencement of work under the contract resulting from this RFB, all necessary licenses, certifications, approvals, and other needed credentials to perform the Scope of Work in the RFB, if applicable.

10.4.2 Insurance Requirements

- (i) Minimum Insurance Requirements. (*required prior to contract execution*).

Upon request by HTFC, the successful Bidder must submit the following insurance documentation upon notification of selection for award:

The successful Bidder(s) (“**Contractor(s)**”) is required to provide and maintain, at its (their) sole cost and expense, the required insurance coverage, at the minimum limits specified herein, during the term of the contract and for two years after completion of work. All required insurance policies must be maintained with insurance companies licensed within the State of New York and holding an AM Best rating of no less than A- VIII. In addition, companies writing insurance intended to comply with the requirements should be licensed or authorized by the New York State Department of Financial Services to issue insurance in the State of New York. The Agency may, at their sole discretion, accept policies of insurance written by a non-authorized carrier or carriers when certificates and/or other policy documents are accompanied by a completed Excess Lines Association of New York (“**ELANY**”) affidavit or other documents demonstrating the company’s strong financial rating. If, during the term of a policy, the carrier’s A.M. Best rating falls below “A-,” Class “VII,” the insurance must be replaced, on or before the renewal date of the policy, with insurance that meets the requirements above.

Contractors shall deliver to the Agency evidence of the insurance required by the Contract(s) resulting from this RFB process in a form satisfactory to the Agency. Policies must be written in accordance with the requirements of the paragraphs below, as applicable. While acceptance of insurance

documentation shall not be unreasonably withheld, conditioned or delayed, acceptance and/or approval by the Agency do not, and shall not be construed to relieve the Contractor of any obligations, responsibilities or liabilities under the resulting Contract. The Contractor shall not take any action, or omit to take any action that would suspend or invalidate any of the required coverages during the term of the Contract.

The Contractor shall provide the Agency with a Certificate or Certificates of Insurance, in a form satisfactory to the Agency as detailed below. For HTFC, certificates shall name the Housing Trust Fund Corporation, 38-40 State Street, Albany, NY 12207 as the certificate holder. Within 30 business days of receipt of any notice of cancellation or non-renewal of insurance, the Contractor shall provide the Agency with a copy of any such notice received from an insurer together with proof of replacement coverage that complies with the insurance requirements of the Contract(s) resulting from this RFB process.

Certificates of Insurance must indicate the applicable deductibles/self-insured retentions for each listed policy. Deductibles or self-insured retentions above \$100,000.00 are subject to approval from the Agency. Such approval shall not be unreasonably withheld, conditioned, or delayed. Bidders and Contractors shall be solely responsible for all claim expenses and loss payments within the deductibles or self-insured retentions. If the Contractor is providing the required insurance through self-insurance, evidence of the financial capacity to support the self-insurance program along with a description of that program including, but not limited to, information regarding the use of a third-party administrator shall be provided upon request.

Prior to the commencement of any work by a Subcontractor, the Contractor shall require such Subcontractor to procure policies of insurance as required herein and maintain the same in force during the term of any work performed by that Subcontractor, unless otherwise approved by the Agency. The Agency reserves the right to set minimum insurance limits in any subcontracting agreement between the Primary Contractor and its subcontractor(s). An Additional Insured Endorsement CG 20 38 04 13 (*or the equivalent*) evidencing such coverage shall be provided to the Contractor prior to the commencement of any work by a subcontractor and shall be provided to the Agency upon request. For subcontractors that are self-insured, the subcontractor shall be obligated to defend and indemnify the above-named additional insureds with respect to Commercial General Liability and Business Automobile Liability, in the same manner that the subcontractor would have been required to pursuant to this section had the subcontractor obtained such insurance policies.

Commercial general liability and business automobility insurance policies shall provide that the required coverage be primary and non-contributory to other insurance available to the Agency and its officers, agents, and employees. Any other insurance maintained by the Agency and its officers, agents, and employees shall be excess of and shall not contribute with the Contractor's insurance.

For the Commercial general liability, business automobile liability, and workers' compensation insurance required below, the Contractor shall cause to be included in its policies insuring against loss,

a waiver of the insurer's right of subrogation against the Agency and its officers, agents, and employees, or, if such waiver is unobtainable (i) an express agreement that such policy shall not be invalidated if the Contractor waives or has waived before the casualty, the right of recovery against the Agency and its officers, agents, and employees or (ii) any other form of permission for the release of the Agency and its officers, agents, and employees. A Waiver of Subrogation Endorsement shall be provided upon request. A blanket Waiver of Subrogation Endorsement evidencing such coverage is also acceptable.

Upon policy renewal/expiration, evidence of renewal or replacement of coverage that complies with the insurance requirements set forth in the Contract(s) resulting from this RFB process shall be delivered to the Agency. If, at any time during the term of the Contract(s), the coverage provisions and limits of the policies required herein do not meet the provisions and limits set forth in this Contract(s), or proof thereof is not provided to the Agency, the Contractor shall immediately cease work. The Contractor shall not resume work until authorized to do so by the Agency.

The Contractor must furnish to the Agency evidence of the insurance requirements indicated below prior to execution of the awarded Contract(s). Contractors shall obtain and maintain in full force and effect, throughout the term of the Contract(s), at their own expense, the following insurance with limits not less than those described below and as required by the terms of the Contract(s), or as required by law, whichever is greater. The Agency reserves the right to modify these insurance requirements.

- 1.1.1 Commercial General Liability Insurance, including Contractual Liability of liability of no less than One Million U.S. Dollars (\$1,000,000) per occurrence, Two Million Dollars U.S. Dollars (\$2,000,000) aggregate and Products and Completed Operations. The limits of liability may be provided in a combination of a Commercial General Liability policy and Umbrella Liability policy, which is written on a no less than follow form basis. The policy should be written on the current edition of ISO occurrence form CG 00 01, or its equivalent, and must not include any exclusions or limitations other than those incorporated in the standard form.

The Contractor shall include coverage for on-going work and operations naming as additional insureds (*via ISO coverage forms CG 20 10 04 13 or CG 20 38 04 13, or a form or forms that provide equivalent coverage*): (a) for HTFC, the Housing Trust Fund Corporation, its Affiliates and their officers, agents, and employees;. A blanket Additional Insured Endorsement evidencing such coverage is also acceptable. For Contractors who are self-insured, the Contractor shall be obligated to defend and indemnify the above-named additional insured, in the same manner that the Contractor would have been required had the Contractor obtained such insurance policies.

Coverage shall include, but not be limited to, the following:

- Premises liability;
- Independent contractors;

- Blanket contractual liability, including tort liability of another assumed in a contract;
- Defense and/or indemnification obligations, including obligations assumed the Contract;
- Cross liability for additional insureds; and
- Products/completed operations for a term of no less than three (3) years, commencing upon acceptance of the work, as required by the Contract.

1.1.2 *Data Breach and Privacy/Cyber Liability Insurance*, in an amount not less than One Million U.S. Dollars (\$1,000,000) each claim, Contractors are required to maintain coverage during the term of the Contract(s) and as otherwise required herein, Data Breach and Privacy/Cyber Liability Insurance, including coverage for failure to protect confidential information and failure of the security of the Contractor’s computer systems due to the actions of the Contractor which results in unauthorized access of the data. Required insurance coverage limits may be provided through a combination of primary and excess/umbrella liability policies.

Said insurance shall provide coverage for damages arising from, but not limited to the following:

- Breach of duty to protect the security and confidentiality of nonpublic proprietary corporate information;
- Personally identifiable nonpublic information (e.g., medical, financial, or personal in nature in electronic or non-electronic form);
- Privacy notification costs;
- Regulatory defense and penalties;
- Website media liability; and
- Cyber theft of customer’s property including, but not limited to, money and securities.

If the policy is written on a claims made basis, the Contractor must submit to the Agency an Endorsement providing proof that the policy provides the option to purchase an Extended Reporting Period (“tail coverage”) providing coverage for no less than one (1) year after work is completed in the event that coverage is cancelled or not renewed. This requirement applies to both primary and excess liability policies, as applicable.

1.1.3 *Professional Errors and Omissions* for no less than One Million U.S. Dollars (\$1,000,000) for each claim and Two Million U.S. Dollars (\$2,000,000) in the aggregate. The coverage must include the following:

- Insure loss arising from any claim or claims made arising out of the scope of services during the policy period by reason of any covered

error, omission or negligent act committed in the conduct of the insured's professional business during the policy period;

- If coverage is written on a claims-made policy, the Contractor warrants that any applicable retroactive date precedes the start of work; and that continuous coverage will be maintained, or an extended discovery period exercised, throughout the performance of the services and for a period of not less than three years from the time work under the Contract resulting from this RFB process is completed; Written proof of this extended reporting period must be provided to the Agency prior to the policy's expiration or cancellation; and
- The policy shall cover professional misconduct or lack of ordinary skill for the positions defined in the scope of services of the Contract resulting from this RFB process.
- This policy requirement applies to both primary and excess liability policies, as applicable.

1.1.4 Automobile Liability, such insurance shall cover liability arising out of an automobile used in connection with performance under the Contract including owned, leased, hired and non-owned automobiles bearing, or under the circumstances under which they are being used, required by the Motor Vehicles Laws of the State of New York to bear license plates in the amount not less than One Million U.S. Dollars (\$1,000,000) per accident.

1.1.5 Workers' Compensation and Disability Benefits - Sections 57 and 220 of the New York State Workers' Compensation Law require the heads of all municipal and State entities to ensure that businesses applying for contracts have appropriate workers' compensation and disability benefits insurance coverage. These requirements apply to both original contracts and renewals. Failure to provide proper proof of such coverage or a legal exemption will result in a rejection of a Bid or any contract renewal. A Bidder will not be awarded a Contract unless proof of workers' compensation and disability insurance is provided to the Agency. Proof of workers' compensation and disability benefits coverage, or proof of exemption must be submitted to the Agency at the time of Bid submission, policy renewal, contract renewal and upon request. Proof of compliance must be submitted on one of the following forms designated by the New York State Workers' Compensation Board. An ACORD form is not acceptable proof of New York State workers' compensation or disability benefits insurance coverage.

Proof of Compliance with Workers' Compensation Coverage Requirements:

- CE-200 – Certificate of Attestation for New York Entities with No Employees and Certain Out-of-State Entities that New York State Workers’ Compensation and/or Disability Benefits Insurance Coverage is Not Required; or
- C-105.2 – Certificate of Workers’ Compensation Insurance (or U-26.3 if insured through the State Insurance Fund); or
- SI-12 – Certificate of Workers’ Compensation Self-Insurance (or GSI-105.2 Certificate of Participation in Workers’ Compensation Group Self-Insurance); or
- Form GSI-105.2, Certificate of Participation in Workers’ Compensation Group Self-Insurance, available from the Contractor’s Group Self-Insurance Administrator.

Proof of Compliance with Disability Benefits Coverage Requirements:

- CE-200 – Certificate of Attestation for New York Entities with No Employees and Certain Out-of-State Entities that New York State Workers’ Compensation and/or Disability Benefits Insurance Coverage is Not Required; or
- DB-120.1 – Certificate of Disability Benefits Insurance; or
- DB-155 – Certificate of Disability Benefits Self-Insurance.

An instruction manual clarifying the New York State Workers’ Compensation Law requirements is available for download at the New York State Workers’ Compensation Board’s website at <http://www.wcb.ny.gov/content/main/Employers/requirements-businesses-applying-government-permits-licenses-contracts.pdf> .

11. Bid Submission Instructions

As indicated in Section 10, a complete bid for this RFB is comprised of four (4) separate tabs: (i) Tab One: Application Coversheet, Cover Letter and Bid Certification; (ii) Tab Two: Technical Proposal ; (iii) Tab Three: Cost Proposal Form; and (iv) Tab Four: Administrative Forms;

One electronic e-mail submission of the Bid Submission, in PDF format, must be emailed to the e-mail address provided in Section 11.2, on or before the Bid Submission Deadline.

11.2 Instructions for the Electronic Submission of Bids

Electronic Bid Submissions must be delivered by email in two parts by the Bid Submission Deadline. In addition, electronic bids must be bookmarked and submitted by email to Monika Lekarczyk and Vanessa Lepe-Mora at Nyhomes.proposal@hcr.ny.gov in searchable Portable Document Format (“**PDF**”) compatible with Adobe Reader XI, version 11.0.4. HTFC will not accept discs, flash drives or FTP file references that require HTFC to download information from the Bidder’s, or third party’s website. If the file is large, it may be submitted in multiple email attachments, with the proper Part One or Part Two label (if applicable) and “1 of X”, “2 of X”, etc., and the last email as “X of X – Final” for each additional email. This is the only acceptable form of e-delivery.

Electronic versions of each Bid Submission must be broken down and labeled as separate attachments as indicated below:

- A. **Part I** shall include two attachments, **Tabs 1 and 2** of the bid, and the subject line of the email for this section must be labeled: **“2024 BIL Weatherization Training RFB – Part I, Tabs 1 & 2”**.
- B. **Part II** shall include two attachments, Tabs 3 and 4 of the bid, and the subject line of the email for this section must be labeled: **“2024 BIL Weatherization Training RFB – Part II, Tabs 3 & 4”**.

All bids and accompanying documentation become the property of the State of New York and will not be returned. HTFC reserves the right to use any portion of the Bidder’s bid not specifically noted as proprietary.

12. Evaluation Process

12.1 Evaluation Process

The evaluation of bids shall be based on the “Best Value” concept. The bid(s) which “optimizes quality, cost, and efficiency” among the responsive and responsible Bidders will be selected for award.

HTFC may deem a bid non-responsive and disqualify a Bidder if any of the required forms, information or other documentation is missing or incomplete. HTFC reserves the right, in its sole judgment, to disregard any apparent errors in a bid that it deems insignificant.

During the evaluation process, HTFC may require information from a Bidder. If specific sections of the written bid require clarification, HTFC will identify the section(s) and information requested in writing. The Bidder should respond by the deadline stated in the correspondence. In addition, HTFC may use the bid, information obtained through any interviews, and HTFC’s own investigation of a Bidder’s qualifications, experience, ability or financial standing, and any other material or information submitted by the Bidder in the course of evaluation and selection under this RFB. HTFC reserves the right to contact other sources not necessarily identified in the bid to obtain information.

12.2 Minimum Qualifications Review

HTFC will examine all bids that are received in a proper and timely manner to determine if they meet the Minimum Qualifications requirements indicated in Section 7 of this RFB. Bids that are materially deficient in meeting the Minimum Qualifications requirements or have omitted material documents, in the sole opinion of HTFC, may be rejected. All bids passing the Minimum Qualifications review will be evaluated.

12.3 Scoring and Evaluation

HTFC will only score complete and responsive bids meeting the Minimum Qualifications described in Section 7 of this RFB. CTS and STS Bidders will be scored separately.

12.3.1 Technical Bid Evaluation – 65 Points

The Agency’s Review Committee (“**Committee**”) will independently score each Technical Bid that meets the submission requirements of this RFB. The Committee will score Technical Bids to identify Bidders with the highest probability of satisfactorily providing the services described in the Scope of Services of this RFB. Evaluations will be based on the Bidder’s demonstration of its ability to provide the services required through its Technical Bid.

12.3.2 Cost Bid – 25 Points

The Agency's Contract Unit will examine the Cost Bid documents and review them for responsiveness to cost requirements. If a Cost Proposal is found to be non-responsive, that bid will be eliminated from consideration. All complete, responsive bids will receive a cost score. Cost bids will be evaluated on a pre-determined formula using the Bidder's proposed Hourly Rates. The maximum score (25 points) will be allocated to the bid with the lowest cost according to this formula. All other bids will receive a proportionate score to the bid with the lowest cost, according to the following formula:

Cost points awarded = (25 potential points) X (Low bid / Bidder's bid)

12.3.3 MWBE Scoring – 10 Points

The Agency's Department of Empowerment, Compliance and Opportunity (“DECO”) will examine the MWBE/SDVOB and EEO documents and review them for responsiveness to MWBE/SDVOB/EEO requirements. Bids that have identified MBEs, WBEs, MWBEs or SDVOBs as the Bidder to meet the Scope of Services are eligible to receive five percentage points. In addition, all bids are eligible to receive five percentage points if their Company Demographic Profile or EEO-1 demonstrates minorities and women comprising a majority of the workforce.

12.3.4 Interviews, if needed – 10 Points

The Agency reserves the right to conduct interviews with selected Bidders with the three highest Initial Composite Scores. An Initial Composite Score for each responsive Bidder will be comprised of the average of each Bidder's Technical score.

Bidders will be notified of the date, location, and time of their interview. The interview will be designed to allow the Bidder to demonstrate their ability to provide the required services. The Bidder, as well as other key personnel who would be responsible for providing the required services, should be present and participate in the interview.

Further information with regard to the format of this stage of the evaluation may be provided to the Bidder prior to the interview. The interview should substantiate the characteristics and attributes claimed by the Bidder in the written response to the RFB. However, the interviews will not be an opportunity to cure material omissions in any Bidder's bid and are not a substitute for a well-written bid.

13. Notification of Selection

HTFC expects to award up to three contracts as a result of this RFB process. It is the intent of HTFC to issue up to three (3) contracts to qualified weatherization training providers who can perform CTS and/or STS T&TAS in the State. Notification(s) of award will be provided to the Bidder(s).

Upon notification of selection, the following administrative forms will be required:

- Proof of the Minimum Insurance Requirements outlined in Section 10.4.2 of this RFB.
- Direct Deposit Form

14. Contract Award

The term of the contract(s) will be for an initial term of three (3) years, with an option to renew for up to three additional two-year periods at the discretion of HTFC. HTFC will evaluate each bid based on the “Best Value” concept and a first-year budget not to exceed \$2,000,000, and a five- year budget not to exceed \$8,750,000.

HTFC may, upon thirty (30) days’ written notice, terminate the contract(s) resulting from this RFB in the event of a successful Bidder’s failure to comply with any of the bid’s requirements unless the successful Bidder obtains a waiver of the requirement.

In addition, HTFC may also terminate any contract resulting from this RFB upon ten (10) days’ written notice if a Contractor makes any arrangement or assignment for the benefit of creditors.

Further, HTFC shall have the right, in its sole discretion, at any time to terminate a contract resulting from this RFB or any unit portion thereof, with or without cause, by giving thirty (30) days written notice to the Contractor.

HTFC reserves the right to terminate a contract resulting from this RFB process in the event it is found that a certification filed by the Bidder in accordance with New York State Finance Law §139-k was intentionally false or intentionally incomplete. Upon such finding, HTFC may exercise its termination right by providing written notification to the Contract awardee.

The awarded contract(s) shall be governed by the laws of the State of New York except where the Federal supremacy clause requires otherwise. The written contract (“Agreement”) with the awarded Bidder(s) shall be a New York State contract that includes the State’s “Standard Clauses for New York State Contracts” and DOE’s “Federal Terms and Conditions,” both documents attached to this RFB, respectively, as Appendices A and B. The entire Agreement shall consist of the documents, appendices and forms listed below.

The contract(s) shall be governed by the laws of the State of New York except where the Federal supremacy clause requires otherwise.

In the event an agreement cannot be made with the highest rated qualified Bidder(s), HTFC reserves the right to negotiate with the next highest rated qualified Bidder(s).

The delivery of services based on an approved contract is expected to commence on or about the time indicated in the Calendar of Events and Milestone section of this RFB.

Upon contract award, public announcements or news releases pertaining to the contract(s) shall not be made without the prior written consent of HTFC.

15. Negative Findings

A bid may be rejected at any time during the evaluation process and thereafter if there are any adverse findings that would prevent HTFC from selecting the Bidder. These findings may pertain to: the Primary Contractor; any firm listed as a partner, sub-consultant, or subcontractor in the bid; any owners, primary shareholders, or executive staff in the Primary Contractor or any of its partners; or any of the principal staff expected to perform or supervise the work outlined in the Scope of Work. Such adverse findings include, but are not limited to:

- Negative findings from the New York State Inspector General, a federal Inspector General or from the U.S. Government Accountability Office, or from an Inspector General in another state;
- Pending or unresolved legal action from the U.S. Attorney General or from an attorney general in New York State or another state;
- Pending or unresolved litigation with the Federal government, any State government, or a local municipality regarding contract performance;
- Arson conviction or pending case;
- Harassment conviction or pending case;
- Local, State, Federal or private mortgage arrears, default, or foreclosure proceedings;
- In rem foreclosure;
- Sale of tax lien or substantial tax arrears;
- Fair Housing violations or current litigation;
- Defaults under any Federal, State or locally-sponsored program;
- A record of substantial building code violations or litigation against properties owned and / or managed by the Bidder or by any entity or individual that comprises the Bidder;
- Past or pending voluntary or involuntary bankruptcy proceeding;
- Conviction for fraud, bribery or grand larceny; or
- Listing on HTFC's At Risk Assessment Listing on the federal or State excluded parties lists.

If the Bidder believes that any of the adverse findings listed above may be applicable to their firm, or any person or entity partnering with their firm, they should provide a detailed explanation of the finding either in the Bidder Disclosure of Prior Non Responsibility Determinations Form, as provided

in Tab 4 of this RFB, or in an attached sheet. Failure to disclose any relevant findings may result in disqualification of the bid.

16. Reservation of Rights

HTFC reserves the right to:

- Reject any or all bids received in response to the RFB;
- Withdraw the RFB at any time, at HTFC's sole discretion;
- Make an award under the RFB in whole or in part;
- Disqualify any Bidder whose qualifications, conduct and/or bid fails to conform to the requirements of the RFB;
- Seek clarifications and revisions of bids;
- Use information obtained through HTFC's investigation of a Bidder's qualifications, experience, ability or financial standing, and any material or information submitted by the Bidder in response to HTFC's request for clarifying information in the course of evaluation and/or selection under the RFB;
- Prior to the contract award, amend the RFB specifications to correct errors or oversights, or to supply additional information, as it becomes available;
- Prior to the contract award, direct Bidders to submit modifications addressing subsequent RFB amendments;
- Change any part of the scheduled timeline;
- Eliminate any mandatory, non-material specifications that cannot be complied with by all of the prospective Bidders;
- Waive any requirements that HTFC deems are not material;
- Negotiate with the successful Bidder within the scope of the RFB in the best interests of the State;
- Conduct contract negotiations with the next responsible Bidder, should HTFC be unsuccessful in negotiating with the selected Bidder;
- Utilize any and all ideas submitted in the bids received;
- Unless otherwise specified in the solicitation, every offer is firm and not revocable for a period of 60 days from the contract award; and,
- Require clarification at any time during the procurement process and/or require correction of arithmetic or other apparent errors for the purpose of assuring a full and complete understanding of a Bidder's bid and/or to determine a Bidder's compliance with the requirements of the solicitation.

Depending on the nature of the procurement, there may be additional State reserved rights beyond those presented here.

Attachment I: Bid Coversheet

Bid Coversheet

Attach this form to the top of your Bid Submission.

ALL BID SUBMISSIONS MUST BE ELECTRONICALLY MAILED TO THE E-MAIL ADDRESS SPECIFIED IN THE BID SUBMISSION INSTRUCTION SECTION OF THE RFP.

GENERAL INFORMATION ON FIRM:

Legal Name of Firm:

Firm's Mailing Address:

Firm's Website:

Firm's Main Telephone Number (including area code):

Federal Tax ID Number:

Data Universal Numbering System Number (DUNS) (if applicable):

SEC CIK Number (if applicable):

Statewide Financial System (SFS) Vendor ID Number (if applicable):

MWBE Registration Number (if applicable):

Indicate name(s) of MWBE subcontractor(s) (if applicable):

Service-Disabled Veteran-Owned Business (SDVOB) Control / Registration Number (if applicable):

Indicate name(s) of SDVOB subcontractor(s) (if applicable):

MAIN CONTACT INFORMATION FOR THIS BID:

Please list the individual that will be the main contact *regarding this bid*:

Contact Name:

Contact Telephone Number (including area code):

Contact E-mail Address:

Contact Facsimile Number (including area code):

PRINCIPAL IN CHARGE:

Please list the primary staff person(s) who will provide services to the Agency. Attach additional sheets if necessary.

Contact Name:

Contact Telephone Number (including area code):

Bid Coversheet

Contact E-mail Address:

Contact Facsimile Number (including area code):

ADDITIONAL CONTACTS (if applicable):

Contact Name:

Contact Telephone Number (including area code):

Contact E-mail Address:

Contact Facsimile Number (including area code):

Contact Name:

Contact Telephone Number (including area code):

Contact E-mail Address:

Contact Facsimile Number (including area code):

Bid Certification

The Bid Submission must be fully and properly executed by an authorized person. By signing this Bid Certification you certify your express authority to sign on behalf of the Bidder and acceptance of the terms included in (i) this RFB, (ii) Appendix A (Standard Clauses For New York State Contracts (iii) HTFC Standard Clauses for Contracts, (iv) the State of New York Multi-Year Agreement and (v) State Finance Law §139-j and §139-k (Procurement Lobbying), and that all information provided in the proposal is complete, true and accurate. By signing this Bid Certification, the Bidder affirms that it understands and agrees to comply with Agency procedures relative to permissible contacts as required by State Finance Law §139-j (3) and §139-j (6) (b). Proposer also affirms that it has reviewed the Minimum Insurance Requirements within the RFB and agrees to be bound by said terms.

Additional information may be accessed at:

<https://ogs.ny.gov/rules-and-regulations>

Legal Business Name of Bidder:	D/B/A Name of Bidder:
Federal Tax Identification Number:	New York State Identification Number:
Printed or Typed Name of Authorized Firm Signatory:	Bidder Signature:
Title:	Date: