



# NOTICE OF REQUEST FOR PROPOSALS FOR HVAC

## Weatherization Assistance Program

Utah Community Action Weatherization (UCA) is accepting subcontractors' proposals for a home energy improvement project under the Utah Weatherization Assistance Program. The program is administered through the Department of Workforce Services Housing and Community Development Weatherization office. The contract requires the weatherization of homes in **Davis, Morgan, Salt Lake, Tooele, and Weber** counties during the period of **July 01, 2025 through June 30, 2026**. During this project, subcontractors are required to perform energy saving measures in customers' homes.

It is estimated during the 2025-2026 fiscal year, the agency will service or replace approximately 100 HVAC systems in Salt Lake, Tooele, Weber, and Davis counties. UCA is requesting proposals from interested parties who are properly licensed contractors in the State of Utah to support our Weatherization Assistance program to diagnose, repair, and replace HVAC equipment.

Beginning on **May 2, 2025** proposal packages will be available online at:

<http://www.utahca.org/news/> or for pickup at

**UCA Weatherization**  
**850 W 1700 S**  
**Salt Lake City, UT 84104.**  
**Phone: 801-214-3130**

Questions about the proposal may be submitted in writing to:

**To:** [stacy.weight@utahca.org](mailto:stacy.weight@utahca.org)  
**Subject:** WZHVAC4012025

Proposal responses must be received by **May 30, 2025 by 4:00 pm** in person, by mail, or by email at the following address.

**UCA Weatherization: WZHVAC04012025**  
**Attn: Stacy Weight**  
**1307 S 900 W**  
**Salt Lake City UT, 84104**  
**Email: [stacy.weight@utahca.org](mailto:stacy.weight@utahca.org)**  
**Phone: 801-214-3130**

Proposal packages submitted to the agency must include:

- Completed bid package (Attachments A thru D)
- Copy of the business license
- Trade certifications and trainings
- Proof of Insurance: Comprehensive general liability insurance throughout the contract period and a minimum single limit of at least

\$3,000,000. Vehicle insurance must have a minimum single limit of at least \$1,000,000 for bodily injury and property damage.

- Current, completed W-9 with TIN information that matches the IRS database. Blank form available at <https://www.irs.gov/pub/irs-pdf/fw9.pdf>
- Sample invoice that separates labor charges from materials.

Utah Community Action complies with the required federal regulations on procurement, as set forth in the Uniform Guidance 2 CFR Part 200. Efforts, including affirmative steps prescribed by federal regulation (if applicable), will be made by Utah Community Action to utilize small and minority-owned businesses, women's business enterprises, and labor surplus area firms when possible. A firm qualifies as a small business firm if it meets the definition of "small business" as established by the Small Business Administration (13 CFR 121.201, Subsector 541512) by having average annual receipts for the last three fiscal years not exceeding \$27.5 million.

**1. INTRODUCTION AND PURPOSE:**

- i. **PURPOSE OF THE REQUEST FOR PROPOSALS:** Utah Community Action, hereinafter referred to as UCA, is soliciting a pool of contractor proposals to provide HVAC services to clients qualified for UCA’s Weatherization Assistance Program in site built and manufactured homes throughout Salt Lake, Tooele, Weber, Davis, and Morgan counties.

Contractors will be responsible for supplying labor, materials, and equipment to perform work as specified on work orders issued by UCA. The contractors will have the responsibility to complete the work in a timely manner and in compliance with the standards set forth by the U.S. Dept. of Energy, Housing and Community Development Weatherization Program and UCA Weatherization.

All costs incurred by Interested Parties in the preparation and submission of a proposal, including any costs incurred during interviews, presentations, or demonstrations are the responsibility of the Interested Parties and will not be reimbursed.

- ii. **SCOPE:** UCA intends to utilize this proposal for all subcontracted HVAC work for a period of one year with a second-year option for renewal; however, UCA may bid out single jobs on an as-needed basis when deemed in the best interest of UCA.

- iii. **OVERVIEW OF PROCURING AGENCY:** UCA is a non-profit community action agency that operates/administers a weatherization program in Davis, Morgan, Salt Lake, Tooele and Weber counties. The U.S. Department of Energy’s (DOE) Weatherization Assistance Program (Weatherization) reduces energy costs for low-income households by increasing the energy efficiency of their homes, while ensuring their health and safety. The Program prioritizes services to the elderly, people with disabilities, and families with children.

- iv. **CONTRACT LENGTH:** The contract will be for a one-year period from **July 1, 2025 thru June 30, 2026** with an option for a second-year renewal.

- v. **METHOD OF AWARD:**

Evaluation will be completed using a weighted scale with the specified factors below.

Price of Labor and Material	45 points
Operational capacity to meet anticipated demand	30 points
Geographical Service Area	10 points
Overall adherence to RFP instructions	5 points
Small and minority-owned businesses, women’s business enterprises, and labor surplus area firms	10 points

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Total 100 points.

**The agency (UCA) will select up to 2 contractors** to fulfill the service need in a reasonable time-frame. If multiple contractors are selected, contractors will be awarded jobs on a rotating basis. Selection will be made from the proposers who are most advantageous to UCA based on the selection criteria outlined above. UCA reserves the right to not select any proposer. Following the closure of this RFP, announcement of the selected contractors will be disclosed to all entities that submitted a proposal.

- i. **CANCELLATION and TERMINATION:** UCA reserves the right to cancel the resulting contract/agreement, for any reason, by giving written notice to Contractor of such cancellation and specifying the effective date thereof, at least ten (10) days before the effective date of such cancellation. Contractor shall, in the event of cancellation, be entitled to receive compensation for any work accepted hereunder in accordance with the Agency's order(s). Contractor may also be compensated for partially completed work in the event of such cancellation. The compensation for such partially completed work shall be no more than the percentage of completion of each work effort, as determined at the sole discretion of UCA, times the corresponding payment for completion of such work as set forth in the Agency's order(s).

**2. PROPOSAL PROCEDURES AND INSTRUCTIONS:**

- i. **Announcement of Request for Proposal:** Beginning **May 2, 2025**, UCA will post the notice for request on its agency website, via social media, and send solicitations to businesses. UCA will receive proposals until **May 30, 2025**.
- ii. **QUESTION AND ANSWER PERIOD:** Questions regarding the RFP must be submitted by **May 22, 2025**. All questions must be submitted in writing to Stacy Weight at [stacy.weight@utahca.org](mailto:stacy.weight@utahca.org). All questions will be answered in writing, and an addendum issued and posted to the website.
- iii. **METHOD OF SUBMISSION:** Digital submissions are preferred. Please include the proposal ID in the subject of the email. The proposal ID is WZHVAC04012025. If a vendor is submitting a paper copy of the proposal, 2 original copies of all materials are required for acceptance of the proposal. Please make submissions to:

**UCA Weatherization**  
**WZMECH220301**  
**Attn: Stacy Weight**  
**1307 S 900 W**  
**Salt Lake City UT, 84104**  
**Email: [stacy.weight@utahca.org](mailto:stacy.weight@utahca.org)**  
**Phone: 801-801-359-2444 EXT. 5706**

Issue RFP	5/2/2025
Written Questions are due	05/22/2025
Mandatory Pre-bid Meeting	05/14/2025 at 5 pm
Responses to Questions	5/23/2025
Proposals are due	May 30, 2025 by 4:00 pm
Announcement of award	6/7/2025

- iv. **INQUIRIES:** All inquiries concerning this Request for Proposals (RFP) will be submitted via e-mail to: [stacy.weight@utahca.org](mailto:stacy.weight@utahca.org). During the procurement process, prospective subcontractors shall direct any inquiries to the e-mail address provided. In no case shall oral communications take precedence over written communications.
- v. **MANDATORY PRE-BID MEETING:** Wednesday, May 14, 2025 at 5 pm. Meeting will be located at 850 West 1700 South, Salt Lake City, Utah 84104.
- vi. **AMENDMENTS TO THE RFP:** If a change to the RFP solicitation (i.e. scope of work, pricing schedules, etc.) becomes necessary after it has been issued, a written amendment will be issued to all prospective subcontractors. The amendment will formally detail each change, but all unmodified terms and conditions remain unchanged.

## RFP Checklist

The following forms must be completed and submitted with the proposal in accordance with the instructions noted on the front cover sheet of the RFP:

- Scope of Work – Attachment A
- Subcontractor Information – Attachment B
- Subcontractor References – Attachment C
- Subcontractor Compensation – Attachment D
- Current W9
- Sample of Company Invoice
- Proof of trade licensure in the State of Utah
- Proof of Insurance in the following categories:
  - **Worker's Compensation** – With Utah Community Action listed as the certificate holder
  - **Commercial General Liability** – General Liability insurance in the minimum amount of \$3,000,000.00 Combined Single Limit per occurrence for bodily injury, personal injury, and property damage including, but not limited to, coverage for premises/operations, independent contractors, contractual liability, products and completed operations. Utah Community Action must be listed as a certificate holder. Vehicle insurance must have a minimum single limit of at least \$1,000,000 for bodily injury and property damage.

## Attachment A - Scope of Services

The contractor agrees to provide services as described on the Scope of Work document provided by UCA. Likely tasks include, but are not limited to:

### Furnace Systems:

1. Repair or replace existing HVAC systems with a high-efficient condensing furnace according to [Utah Weatherization Assistance Program \(WAP\)](#) standards. New/Replacement equipment specifications are calculated using a Manual J load calculator. Typical installations will include equipment, duct work, gas line modifications, wiring, flue lining, and proper venting. All connections to the furnace must be thoroughly sealed.
2. Modification or repair of duct work
3. Install new or upgrade existing gas lines and flex connectors.
4. Re-lining of an orphaned water heater flues when a common vent is no longer used by the furnace. UL approved high wind caps are required.
5. All materials used for UCA projects must comply with 10 CFR Appendix A to Part 440 [Standards for Weatherization Materials](#).
6. All new equipment requires commissioning/startup documentation on UCA supplied forms along with combustion testing. Pre and post photographs, completed work order forms, and a material list of items used will be required with all invoices. UCA will provide training for all specialized forms and tests.
7. Weatherization activities must comply with the standards set forth in [Weatherization Field Guide](#). A digital copy will be provided to each subcontractor.

### Cooling Systems:

1. Repair and replace existing cooling systems with a SEER 17 or higher. Cooling systems include forced air condensing units, window mount condensing units, and roof/window mount swamp coolers.
2. Installation or repair of air conditioning units including: electrical at the unit as needed, refrigeration lines as needed, TXV metering devices on all evaporative coils, liquid line filter drier when applicable, equipment pad as needed, control wiring as needed and condensation drain. All systems are to be pressure tested with dry nitrogen for no less than 15 minutes at 150 PSI and at least a 500 Micron vacuum pulled on all systems. All new equipment requires commissioning/startup documented on approved forms.
3. Other, as specified in the Scope of Work provided to the Contractor.
4. All invoice submissions must include the following:
  - Equipment startup forms (provided by UCA)
  - Combustion testing results
  - Pre-& Post installation pictures including name plates, equipment, & duct work
  - Material list
  - Labor and materials accounted for separately on invoices

5. Follow guidelines imposed by OSHA, UCA is responsible to identify confined spaces. A Confined Space is a space which is: large enough and so configured that an employee can enter, has limited or restricted means of entry and exit, and is not designed for continuous employee occupancy. In addition to the OSHA standard, spaces with openings less than 18" x 22", and areas with a clear height less than 18" or a clear width less than 24" shall be considered "non-accessible" for the purpose of weatherization activities. If a worker is not physically able to fit through these dimensions they should not be required to do so. No soldering, welding, or brazing is allowed in a confined space.

**CONTRACTOR INFORMATION**

**Attachment B**

- 1. Business Name: \_\_\_\_\_
- 2. Owner(s) Name: \_\_\_\_\_
- 3. Contact Person: \_\_\_\_\_
- 4. Physical Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 5. Billing Address (if different from physical): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 6. Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_
- 7. Email address: \_\_\_\_\_
- 8. Company Structure (corporation, partnership, sole proprietorship): \_\_\_\_\_
- 9. Business Type (Trade): \_\_\_\_\_
- 10. Years in Business: \_\_\_\_\_
- 11. Federal Tax Identification Number: \_\_\_\_\_

Initial this box if you are a small business, minority-owned business, or a woman owned business enterprise

Attachment C

**CONTRACTOR REFERENCES**

<b>Contractor:</b>			
Provide company name, address, contact person, telephone number, and appropriate information on product(s) and/or service(s) used for four (4) or more installations with requirements similar to those included in this solicitation document. If vendor is proposing any arrangement involving a third party, the named references should also be involved in a similar arrangement.			
Company Name:			
Address (include Zip + 4):			
Contact Person:		Phone No:	
Product(s) and/or Service(s)			

Company Name:			
Address (include Zip + 4):			
Contact Person:		Phone No:	
Product(s) and/or Service(s)			

Company Name:			
Address (include Zip + 4):			
Contact Person:		Phone No:	
Product(s) and/or Service(s)			

Company Name:			
Address (include Zip + 4):			
Contact Person:		Phone No:	
Product(s) and/or Service(s)			

**Subcontractor Compensation  
SPECIFICATIONS AND REQUEST FOR PRICING PROPOSALS**

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The Contractor shall furnish all supervision, technical personnel, labor, machinery, tools, equipment, materials and services, and perform all mechanical and Weatherization work required in accordance with the [State of Utah Standard Work Specification Procedures](#) (SWS). The work performed is based on home energy audits conducted by UCA. Typical measures installed by contractors may include: tuning, repairs and replacing primary heating and cooling systems, installing, sealing, and repairing duct work, removing unvented space heaters, and minor electrical and gas line repairs.

The work is performed in site-built homes and mobile homes. UCA will issue work orders with service specifications and property details for each job. UCA will rotate jobs between the three contractors to ensure fair and equal opportunity.

Contractor agrees to use materials that meet or exceed the expectations found in [10 CFR 440 Appendix A: "Standards for Weatherization Services"](#). The Contractor also agrees to perform all work issued by UCA with highest quality standards and professionalism.

Contractor is responsible for leaving the job site clean, hauling away job debris, and existing equipment (if applicable) and for properly disposing of existing equipment or debris to meet EPA regulations. When applicable, EPA RRP Lead Safe Work Practices must be followed.

Weatherization project commencement and completion must be accomplished within Twenty (20) working days of notice to proceed. Contractor is to notify UCA as soon as project is completed for inspection.

All projects are subject to a UCA quality inspection and verification of required documentation prior to payment. UCA payment terms are Net 30.

All work must be guaranteed for 1 year and there can be no charge for call backs during this period.

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## **HVAC**

### **General Contractor Requirements**

All new HVAC installations are to be performed in accordance with the most recent Universal Mechanical Code and/or local building code. In addition to the building code, the weatherization program is required to conform to a state approved field guide. [Weatherization Field Guide](#).

All new unit installations must operate from a ThermWise qualified smart thermostat. A list of qualifying Thermostats may be found at <https://www.thermwise.com/wp-content/uploads/Appliance-Smart-Thermostat.pdf>. UCA will provide thermostats upon request.

Contractor will provide the client with a one-year supply of furnace filters. Standard 1" or 2" filters should be supplied as a box of 12. 4" and larger filter sizes should be supplied as a box of 6 filters.

New equipment installations require State approved data collection forms. Typical forms include but are not limited to:

- [Air Conditioner Start-Up and Performance Checklist](#)
- [Furnace Startup & Performance Check Sheet](#)
- [Furnace Clean & Tune Summary Report](#)
- [Furnace Client Education Form](#)
- A list of all forms is available on the [States Resource](#) page.
- A CO analysis must be provided for each install and service call.
- A [Worst-Case Draft Test](#) must be performed on natural draft water heaters prior to leaving the client's home. (Training will be provided)

The Contractor shall leave all literature on the new units with the client and shall provide the client with education of proper care and maintenance required for the new unit. Client must acknowledge receipt of instruction by signing the [Client Education Checklist](#).

### **Standard Installation/Repair**

UCA is responsible for properly sizing units using a Manual J or other heat load calculation and scoping the work for each project requiring new or replacement systems.

The Contractor shall be responsible for ensuring a properly sized gas line is supplying the heater and shall inform agency in the event that existing line is improperly sized.

When required, all venting and combustion air shall be installed in accordance with AGA and GAMA specification.

All duct work connections and holes shall be sealed, on all sides, with a non-toxic, UL 181B listed mastic duct sealant applied per manufacturers specifications.

New conduit or PVC pipe installed through the roof shall include new properly sized roof jack with 3-course seal at the roof.

### **Materials to Include in Bid**

The Standard Installation Material List includes items that UCA anticipates will be used on common installations. These items should be included in the base cost of installing a properly sized replacement unit and would be included in the material list provided with the invoice.

- Box/case of appropriately sized furnace filters (one-year supply)
- Sheet metal
- Fasteners
- Sealants
- New gas shut-off valve
- Flex connector
- Rigid piping to connect new equipment to existing gas line
- New junction box (when applicable)
- Thermostat connection
- Properly sized PVC flue (average 40')
- Remove metal flue for furnace

- Capping the connection
- Common venting: Eliminating common vent & using existing flue if properly sized within the same room
- When existing flue is properly sized and water heater becomes orphaned, capping flue to old furnace connection for proper drafting of orphaned water heater.
- PVC pipe and fittings for proper drainage to existing floor drain.

Certain items should not be considered standard materials for installation. If an install requires materials beyond those specified in the Standard Installation Material list, or if a project has special conditions and requirements that deviate from the Standard Installation Material list, a change in scope of work must be approved by UCA prior to performing the install. Additional items must be itemized separately on the final invoice. Examples of items that should not be considered Standard Installation Materials are:

- Condensate pumps, which should only be installed when necessary or when the present pump interferes with unit performance.
- Replacing improperly sized flue of an orphaned water heater with a new chimney liner or properly sized B-vent through the roof.
- Additional PVC venting above the average 40'

**Vendor Price Proposal Requirements**

It will be the subcontractor's responsibility to ensure that necessary permits have been secured prior to starting work. Permits, when required as applicable by local building code, may be charged to UCA Weatherization. This cost must be covered by a copy of the permit showing the cost of the permit.

Labor must be accounted for separately in the bid and on vendor invoices.

Pricing bids provided below should include all expected costs of install, including removal of old equipment, recovery of refrigerant of existing system as required by law, overhead, labor, materials, equipment, permit fees, and any other anticipated costs.

UCA is tax exempt and cannot pay sales tax.

<i>ITEM 1: Crisis Service Call</i>			
Description Of Scope Of Work	Contractor's Bid Amount		
Evaluate and diagnose existing system and conduct minor repair of materials up to \$400	Material Costs	Labor Costs	Total Cost
Service Call Fee: Minor Repair Labor:			
<b>ITEM 1: 90% + AFUE HVAC FURNACE SINGLE STAGE</b>			
<b>BRAND:</b>		<b>MODEL:</b>	
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Description Of Scope Of Work	Contractor's Bid Amount		
Removal of forced air gas furnace and replace with new high efficient single stage gas furnace.	Material Costs	Labor Costs	Total Cost
40,000 btu (or nearest equivalent & specify) 60,000 btu (or nearest equivalent & specify) 80,000 btu (or nearest equivalent & specify) 100,000 btu (or nearest equivalent & specify) 125,000 btu (or nearest equivalent & specify)			
<b>ITEM 2: 90% + AFUE HVAC FURNACE 2 STAGE</b>			
<b>BRAND:</b>		<b>MODEL:</b>	
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Description of Scope Of Work	Contractor's Bid Amount		
Removal of forced air gas furnace and replace with new high efficient 2 stage gas furnace with ECM motor	Material Costs	Labor Costs	Total Cost
40,000 btu (or nearest equivalent & specify) 60,000 btu (or nearest equivalent & specify) 80,000 btu (or nearest equivalent & specify) 100,000 btu (or nearest equivalent & specify) 125,000 btu (or nearest equivalent & specify)			

<b>ITEM 3: 90% + AFUE HVAC FURNACE MODULATING</b>			
<b>BRAND:</b> _____		<b>MODEL:</b> _____	
Description Of Scope Of Work	Contractor's Bid Amount		
Removal of forced air gas furnace and replace with new high efficient Modulating gas furnace with ECM motor.	Material Costs	Labor Costs	Total Cost
40,000 btu (or nearest equivalent & specify) 60,000 btu (or nearest equivalent & specify) 80,000 btu (or nearest equivalent & specify) 100,000 btu (or nearest equivalent & specify) 125,000 btu (or nearest equivalent & specify)			
<b>ITEM 4: 90% + AFUE FURNACE MOBILE HOME</b>			
<b>BRAND:</b> _____		<b>MODEL:</b> _____	
Description Of Scope Of Work	Contractor's Bid Amount		
Removal of down flow forced air gas furnace and replace with new mobile home approved high efficiency gas furnace	Material Costs	Labor Costs	Total Cost
50,000 btu (or nearest equivalent & specify) 75,000 btu (or nearest equivalent & specify)			
<b>ITEM 5: 17 SEER + AIR CONDITIONING (Replace Existing)</b>			
<b>BRAND:</b> _____		<b>MODEL:</b> _____	
Description Of Scope Of Work	Contractor's Bid Amount		
Replacement AC Unit: New condenser, coil and flush line set. 17 SEER	Material Costs	Labor Costs	Total Cost
2 ton 3 ton 4 ton			

<b>ITEM 6: 17 SEER + AIR CONDITIONING (Add New System)</b>			
<b>BRAND:</b> _____		<b>MODEL:</b> _____	
<b>Description Of Scope Of Work</b>		<b>Contractor's Bid Amount</b>	
<b>New AC unit: Including electrical, line set and startup 17-SEER</b>	<b>Material Costs</b>	<b>Labor Costs</b>	<b>Total Cost</b>
	2 ton		
	3 ton		
	4 ton		
<b>ITEM 7: HVAC WATER HEATER RELINE</b>			
<b>Description Of Scope Of Work</b>		<b>Contractor's Bid Amount</b>	
<b>Re-line orphaned water heater after furnace change out</b>	<b>Material Costs</b>	<b>Labor Costs</b>	<b>Total Cost</b>
<b>ITEM 8: HVAC THERMOSTAT</b>			
<b>Description Of Scope Of Work</b>		<b>Contractor's Bid Amount</b>	
<b>Install ThermWise approved smart thermostat</b>	<b>Material Costs</b>	<b>Labor Costs</b>	<b>Total Cost</b>
	<b>Brand:</b> _____	<b>Model:</b> _____	
<b>ITEM 9: HVAC DUCTWORK (Adding New)</b>			
<b>Description Of Scope Of Work</b>		<b>Contractor's Bid Amount</b>	
<b>Install new ductwork, seal, and insulate per linear foot:</b>	<b>Material Costs</b>	<b>Labor Costs</b>	<b>Total Cost</b>

Hard pipe Flex duct			
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<i>ITEM 10: HVAC DUCTWORK (Repair)</i>			
Description of Scope of Work	Contractor's Bid Amount		
Repair new ductwork, seal, and insulate per linear foot:	Material Costs	Labor Costs	Total Cost
Hard pipe Flex duct			

<i>ITEM 11: HVAC TUNE UP</i>			
Description of Scope of Work	Contractor's Bid Amount		
Routine clean/tune service of furnace:	Material Costs	Labor Costs	Total Cost

<i>ITEM 12: 1-YEAR FURNACE FILTER SUPPLY</i>			
Description of Scope of Work	Contractor's Bid Amount		
Provide client with a 1-year supply of properly sized furnace filters. Standard 1-2" filters = box of 12, standard 4" or larger = box of 6	Material Costs	Labor Costs	Total Cost
1" Filter (box of 12) 2" Filter (box of 12) 4" Filter (box of 6)			