REQUEST FOR BID # 05-1421

Final Inspection & Energy Audit Services

THIS IS NOT AN ORDER REV. 06/20/2017

CR – Social Development Commission
Weatherization Program
1730 West North Avenue
Milwaukee, WI 53205

Bid Due Date

Tuesday, June 1, 2021, 2:00 p.m. CT

All questions relating to this Request For Bid shall be submitted in writing to:

Scott Scherer, Procurement Coordinator
1730 W. North Avenue, Milwaukee, WI 53205
Fax #414-906-2719, Email sscherer@cr-sdc.org

Quote Price and Delivery FOB

FOB Destination (also see Appendix A, 5.0.)

Note – Email and Fax bids not accepted.

Calendar of Events

Friday, May 14, 2021, 10:00 a.m. CT	RFB Issuance
Thursday, May 20, 2021, 2:00 p.m. CT	Deadline for Submitting Written Questions
Thursday, May 27, 2021, 8:00 a.m. CT	**Mandatory Bidders' Meeting**
Tuesday, June 1, 2021, 2:00 p.m. CT	**Bid Due Date**
Tuesday, June 1, 2021, 2:01 p.m. CT	Bid Opening

Bidder Name and Address (must be completed)

☐ We claim Wisconsin certified minority business or Wisconsin certified disabled veteran-owned business preference. Under Wisconsin Statutes, a 5% preference may be granted to a **CERTIFIED Minority Business Enterprise (MBE)** or a **CERTIFIED Disabled Veteran-owned Business (DVB)**. Bidder must be certified by the Wisconsin Department of Administration. If you have questions concerning the certification process, contact the Wisconsin Department of Administration, 101 E. Wilson St., 6th Floor, Madison, WI 53703, (608) 261-2510. **Does Not Apply to Printing Bids**.

ACKNOWLEDGEMENT OF ANY ADDENDA and/or REVISIONS and AGREEMENT TO ALL TERMS: In signing this Bid, Bidder acknowledges and affirms that its Bid complies with all terms, conditions and specifications of this RFB and any addenda, appendices or revisions thereto. If awarded a contract, Bidder shall comply with all terms of its Bid and all terms, conditions and specifications of this RFB and any addenda or revisions thereto.

DEBARMENT AND SUSPENSION: In signing this Bid, Bidder acknowledges it has not been suspended, debarred, declared ineligible or voluntarily excluded from eligibility by any Federal department or agency.

NON-COLLUSION: In signing this Bid, Bidder certifies it has not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a Bid; that this Bid has been independently arrived at without collusion with any other Bidder, competitor or potential competitor; that this Bid has not been knowingly disclosed prior to the opening of Bids to any other Bidder or competitor; that the above statement is accurate under penalty of perjury.

Name of Authorized Company Representative (Type or Print)	**Title**		**Date**
Signature of Authorized Company Representative Named Above	**Phone**	**Fax**	**Email**

CHECKLIST FOR SUBMITTING A BID

Understanding the Request for Bid (RFB)

- ☐ Thoroughly read and review this Request for Bids and all attachments, appendices, addenda, and/or revisions.
- ☐ Submit any written questions to the Procurement Coordinator by the deadline provided in the Calendar of Events.
- ☐ Determine if the agency will hold a Bidders' meeting (see Section 3.7) and check the date provided in the Calendar of Events (see cover page).
- ☐ Know when and where the Bid is to be delivered.

Completing Your Bid

- ☐ Complete the Cost Sheet(s) provided with the RFB. Make sure your prices and calculations are accurate. If required, provide a written statement of what volume of work or quantity or products your company can handle under the Bid requirements. Do not alter the format of the Cost Sheet.
- ☐ Complete the Vendor Information Form provided with the RFB.
- ☐ Complete the two (2) Vendor Reference Forms provided with the RFB.
- ☐ Assemble required data specification sheets for each appliance or product on which you are bidding.
- ☐ Complete and sign the Request for Bid sheet provided as the cover of this RFB package.
- ☐ This checklist is provided for the Bidder's convenience only and is not required to be submitted with the Bid package.

Submitting Your Bid

- ☐ Prepare one set of original documents marked "Original" in the following order:
  1. **Signed Request for Bid Sheet** (RFB cover page)
  2. **Vendor Information Form** (Attachment 1)
  3. **Vendor Reference Form (Client)** (Attachment 2A)
  4. **Vendor Reference Form (Financial)** (Attachment 2B)
  5. **Cost Sheet(s)** (Attachment 3)
  6. **Additional Information** See Section 8. for details
- ☐ Make one photocopy of the complete set of original documents. Mark the photocopied set "Copy."
- ☐ Place the original and copied set of documents in a sealed package (envelope or box). Make sure the following information is clearly marked on the outside of the envelope or box:
  1. Bidder's Name and Address
  2. Request for Bid Title (See upper left hand box of RFB cover page)
  3. Request for Bid Number (See upper left hand box of RFB cover page)
  4. Bid Due Date (See upper left hand box of RFB cover page and Calendar of Events)
- ☐ Ensure the sealed package is delivered to the correct address before the Bid Due Date and time in the Calendar of Events. **No emailed or faxed Bids are allowed**.

If You are Chosen for a Contract Award:

- ☐ Be prepared to provide any documents required by the agency — such as certificates of insurance, licenses, contractor credentials, training certificates, IRS Form W-9 (Request for Taxpayer Identification Number) or Affirmative Action plan/exemption (see Appendix A for more information).

1. INTRODUCTION

1.1 Scope

The purpose of this Request for Bids (RFB) is to provide interested parties with information needed to prepare and submit a Bid for the following:

Final Inspection & Energy Audit Services

CR-Social Development Commission (Agency) intends to use the results of this process to award a contract(s) to provide the goods or services described in this RFB, except for items identified as Informational Pricing. A detailed description of the commodities and/or services to be provided by the Lowest Responsible Bidder(s) is contained in the Cost Sheet(s) and other parts of this RFB.

The SERVICE TERRITORY in which these services will be provided includes: City of Milwaukee

The Agency may bid out specialized jobs, or procure specialized commodities, on an as-needed basis when deemed in the best interest of the Agency.

1.2 Procuring Agency

CR-Social Development Commission is a local administrative and executive weatherization service agency that works in conjunction with the State of Wisconsin Weatherization Assistance Program to provide residential weatherization services to eligible households. The State of Wisconsin Weatherization Assistance Program helps low-income residents reduce energy costs by decreasing home energy consumption through the installation of energy-saving measures and equipment. .

1.3 Definitions

Words and terms in this RFB shall be given their ordinary and usual meanings, and all meanings shall be applicable to the singular and plural forms of the words and terms. For the purposes of this RFB, the following words and terms shall have the meanings indicated:

"Agency" means CR-Social Development Commission.
"Appeal" means a process whereby an aggrieved Bidder may appeal the denial of a Protest to the Administrator of the Division.
"Bid" or "Bid Document" means the complete response of a Bidder, including all required documentation, submitted on the approved forms and setting forth the Bidder's prices for providing the commodities and/or services described in the RFB.
"Bidder" means any individual, company, corporation or other entity that responds to this RFB.
"Calendar of Events" means the official schedule of events, deadlines and dates shown on the cover of this RFB.
"Callback" means work required as a result of a final inspection or complaint/concern and occurs prior to a dwelling unit being reported as completed within the WisWAP System.
"Commodity" means the products, materials, supplies or equipment described in this RFB.
"Contract" means a written agreement between the Agency and Contractor that covers the delivery of work and/or commodities to be performed subsequent to this RFB.
"Contractor" or "Vendor" means a Bidder that is awarded a Contract under this RFB.
"Department" means the Wisconsin Department of Administration.
"Division" means the Division of Energy, Housing and Community Resources (DEHCR), Wisconsin Department of Administration.
"DVB" means a disabled veteran-owned business certified by the Wisconsin Department of Administration under Wis. Stats. s. 16.75(3m).

"Good Faith Dispute" means a contention by an Agency that goods delivered or services rendered were of a lessor quantity or quality than ordered or specified by contract, were faulty or were installed improperly; or any other reason giving cause for the withholding of payment by the agency until the dispute is settled.
"Informational Pricing" means prices provided for informational purposes in Attachment 3. Informational Pricing is not used to calculate the Grand Total or determine the Lowest Responsible Bidder. Items with informational pricing are outside the Scope of the resulting contract, and may or may not be ordered by Agency. The Agency reserves the right to negotiate prices and/or obtain the item from another Bidder.
"Interested Bidder" means any individual, company, corporation or other entity that is included on a solicitation list, requested a Bid package or attended a Bidders' meeting (if a Bidders' meeting is scheduled as part of this RFB).
"Lowest Responsible Bidder" means the Bidder that submits the lowest dollar total appearing in combination with other elements of the RFB that best meets the requirements of the solicitation, and demonstrates their Bid is responsive to technical and administrative requirements as requested.
"MBE" means a minority business certified by the Department of Administration under §560.036 (2), Wis. Stats.
"Prime Contractor" means the Contractor when it has engaged subcontractors to perform work under the Contract.
"Procurement Coordinator" means the person identified on the cover of this RFB who has been designated by the Agency to manage this RFB.
"Protest" means a process whereby an aggrieved Bidder may protest this RFB or the resulting Notice of Intent to Award to the Chief Executive Officer of the Agency.
"Request for Bid (RFB)" means this document including appendices, addenda, revisions and/or attachments.
"State" means the State of Wisconsin.
"Vendor" or "Contractor" means a Bidder that is awarded a Contract under this RFB.
"WisWap System" means the centralized web-based application operated by the Division for the purposes of contracting with the Agency, project tracking, production monitoring, job costing, monthly invoicing, distribution of funds, and program reporting.
"Working Days" means each calendar day except Saturday, Sunday, and official Federal holidays. All other references to 'days' means calendar days. If 'working' is not included in the reference to number of days, the days are calendar days.

2. CONTRACT INFORMATION

2.1 Contract Term

The Contract shall be in effect for a period of twelve (12) Months from 07/01/2021. The Contract may be renewed for one (1), one (1) year period by mutual written consent. Contract period for the HE+ Furnace Program is October 1, 2021 through September 30, 2022.

2.2 Terms and Conditions

In addition to the terms, conditions and specifications contained in this RFB, the following documents govern this RFB and any resulting contracts:

- **Appendix A – Wisconsin Weatherization Assistance Program Terms and Conditions**

Bidders shall accept the terms and conditions referenced above in their entirety or submit point-by-point exceptions along with proposed alternative or additional language for each exception. The Agency may

reject a Bid if it deems the proposed alternative or additional language to be unacceptable. Submission of the Bidder's standard terms and conditions as a substitute for language in the terms and conditions is not a sufficient response to this requirement and may result in rejection of the Bid. Failure of the successful Bidder to accept the Agency's terms and conditions for a contract shall result in cancellation of the award.

2.3 Contract Modifications

Any alterations made to the Contract shall be rendered in writing and signed by both parties; no changes without such signed documentation shall be valid. No alterations outside of the general scope and intent of the original RFB or in excess of allowable and accepted price changes shall be made.

2.4 Entire Agreement

The Standard Terms and Conditions (Appendix A) shall apply to any Contract or order awarded as a result of this request except where special requirements are stated elsewhere in the request; in such cases, the special requirements shall apply. Further, the written Contract and/or order with referenced parts and attachments shall constitute the entire agreement and no other terms and conditions in any document, acceptance, or acknowledgment shall be effective or binding unless expressly agreed to in writing by the contracting authority.

3. BID PROCEDURES AND INSTRUCTIONS

3.1 Reasonable Accommodations

The Agency shall provide reasonable accommodations, including the provision of informational material in an alternative format, for individuals with disabilities upon request. If you need information in an alternative format or accommodations at a Bid opening or at a Bidder meeting, contact the Procurement Coordinator.

3.2 Bid Contents and Delivery Requirements

Bidders shall submit an original Bid document and one copy of the Bid document by the Bid Due Date in the Calendar of Events to:

USPS/Mailing Address	**Address for Hand-Delivery**
Scott Scherer, Procurement Coordinator	Scot Scherer, Procurement Coordinator
CR-Social Development Commission	CR-Social Development Commission
1730 West North Avenue	1730 West North Avenue
Milwaukee, Wisconsin 53205	Milwaukee, Wisconsin 53205

All Bids shall be packaged (envelope or box), sealed and show the following information on the outside of the package:

1. Bidder's Name and Address
2. Request for Bid Title (See upper left hand box of RFB cover page)
3. Request for Bid Number (See upper left hand box of RFB cover page)
4. Bid Due Date (See upper left hand box of RFB cover page and Calendar of Events)

Bids shall be date and time stamped at the office indicated above on or before the date and time Bids are due. Late Bids shall be rejected. Bids dated and time stamped in another office may be rejected. Bids that are not properly sealed may be rejected. Receipt of a Bid by the mail system does not constitute receipt of a Bid by the Agency. Any Bid that is inadvertently opened as a result of not being properly and/or clearly marked may be rejected. Bids shall be submitted separately and may not be included with sample packages or other Bids. Emailed or faxed Bids are not allowed.

3.3 Calendar of Events

The Calendar of Events provides important dates and times by which actions related to this RFB shall be completed. In the event that the Agency finds it necessary to change any of these dates and times, it shall provide written notification of such changes per Section 3.4, Communication with Bidders.

3.4 Communication with Bidders

In the event it becomes necessary to make changes to the Calendar of Events, provide additional clarifying data or information, revise any part of this RFB, or provide a record of questions and answers, the Procurement Coordinator shall send written notification, electronically or in hard copy, to all Interested Bidders.

3.5 Format of Bid

Bidders responding to this RFB shall submit the following materials:

a) **Signed Request for Bid Sheet**: The Bid shall include the signed Request for Bid sheet provided as the cover of this RFB package. A Bid submitted in response to this RFB shall be signed by the person in the Bidder's organization who is responsible for decisions regarding prices offered in the Bid or by a person who has been authorized in writing to act as agent for the person responsible for the decision on prices.

b) **Vendor Information Form** (Attachment 1)

c) **Vendor Reference Form (Client)** (Attachment 2A)

d) **Vendor Reference Form (Financial)** (Attachment 2B)

e) **Cost Sheet** (Attachment 3): Provide cost information on the Cost Sheet(s) included in this RFB. All costs for furnishing the commodities and/or services, as set forth in the terms and conditions of this RFB, shall be included in the Bid. Please refer to Section 7. Cost Information, for information on Bid pricing, capacity and price adjustments.

f) **Additional Information**: Please refer to Section 8. Additional Information Requirements, for a listing of required additional documents.

The checklist included with this RFB is provided for the convenience of the Bidder. The Bidder is not required to submit the checklist with its Bid package.

3.6 Questions

Questions concerning this RFB shall be submitted in writing to the Procurement Coordinator on or before the Deadline for Submitting Written Questions provided in the Calendar of Events. Bidders are expected to raise any questions, exceptions or additions concerning the RFB document prior to this deadline. If a Bidder discovers any significant ambiguity, error, conflict, discrepancy, omission or other deficiency in this RFB, the Bidder shall immediately notify the Procurement Coordinator and request modification or clarification of the RFB document. All questions shall be recorded by the Agency. All questions and answers shall be provided per Section 3.4, Communication with Bidders.

3.7 Bidders' Meeting

The Agency will hold a public informational meeting for Bidders at the date and time provided in the Calendar of Events. The Bidders' meeting will be held at the following location:

CR-Social Development Commission
1730 West North Avenue
Milwaukee, WI 53205

The Bidder's meeting is mandatory. Bidders shall be required to register when attending the mandatory Bidders' meeting. Notwithstanding Section 3.4, a written record of questions asked and answered at the mandatory Bidder's meeting shall be created and sent electronically or in hard copy to only those Bidders that attend the mandatory Bidders' meeting. Only Bidders that attend the mandatory Bidders' meeting are permitted to submit a Bid; failure to attend the mandatory Bidders' meeting shall result in rejection of a Bid.

3.8 Multiple Bids

Multiple Bids from a Bidder are permitted. Each Bid shall conform fully to the requirements of this RFB. Each Bid shall be separately submitted and labeled as Bid #1, Bid #2, etc., on each page included in the response.

Each Bid shall offer different manufacturers and/or models of products for items identified in the RFB. Multiple Bids identifying the same manufacturers and/or models of products shall be deemed non-responsive, and only the lowest Bid price by the Bidder shall be deemed the Lowest Responsible Bid.

If the Agency awards multiple contracts, a Bidder may receive only one award based upon its Lowest Responsible Bid. A Bidder's succeeding responsible Bids shall be rejected for the purposes of awarding to multiple vendors.

3.9 Incurring Costs

Neither the Agency nor the State of Wisconsin is liable for any cost incurred by a Bidder for responding to this RFB.

3.10 Contact with the Agency

From the date of issuance of this RFB until a Letter of Intent to Award a Contract is issued, all contacts with the Agency regarding this RFB shall be made only through the Procurement Coordinator. Any information provided by a source other than the Procurement Coordinator shall be deemed unofficial and nonbinding. Violation of this condition may be considered sufficient cause for rejection of a Bid, irrespective of any other considerations.

3.11 News Releases

News releases pertaining to the RFB or to the acceptance, rejection or evaluation of Bids shall not be made without the prior written approval of the Agency and the State of Wisconsin.

4. BID ACCEPTANCE, VERIFICATION AND AWARD

4.1 Bid Opening

Bids shall be opened on the Bid Opening date and time specified in the Calendar of Events. Names of the Bidders may be read aloud at the Bid opening. The Bid opening will be held at the following location:

CR-Social Development Commission
1730 West North Avenue
Milwaukee, WI 53205

4.2 Bid Review and Verification

The Agency shall review each Bid to verify that it meets all specified requirements in this RFB. This verification may include requesting reports on the Bidder's financial stability, conducting demonstrations of the Bidder's proposed products and/or service, and reviewing results of past awards to the Bidder by the Agency.

a) Capability and Performance History: Before the award of any contract(s), the Agency shall be satisfied that the Bidder has sufficient capability and performance history to perform the work described in the RFB. It is the Bidder's responsibility to provide information to the RFB Procurement Coordinator that demonstrates these qualifications by submitting clear, concise and complete documentation and thorough references.

b) References: Bidders shall provide the information required in the vendor reference forms by supplying with their Bid:

1. A client list of no less than three (3) and no more than six (6) references for which similar products and/or services have been provided during the past three (3) years. See Attachment 2A.
2. Contact information for no less than one (1) and no more than four (4) credit reference(s). See Attachment 2B.

If contacted, information received from such references may be used to determine whether the Bidder meets the State's requirements.

4.3 Bid Acceptance

Bids that do not comply with instructions contained in this RFB may be rejected by the Agency. The Agency reserves the right to waive a particular specification if no Bidder meets that specification. The Agency may request reports on a Bidder's financial stability. The Agency may reject a Bid if the Bidder is determined to have inadequate financial means to provide the product or service being Bid. The Agency retains the right to accept or reject any or all Bids, or accept or reject any part of a Bid, deemed to be in the best interest of the Agency and the State of Wisconsin. The Agency shall be the sole judge as to compliance with the instructions contained in this RFB. Bids shall be firm for acceptance for ninety (90) days from date of Bid opening unless otherwise noted. A Bidder may withdraw its Bid at any time prior to the issuance of an Intent to Award.

4.4 Minority Business Enterprises and Disabled Veteran Businesses

The Agency, in its sole discretion, may provide up to a five percent (5%) Bid preference to certified Minority Business Enterprises and Disabled Veteran Businesses in accordance with §16.75(3m), Wis. Stats. See https://wisdp.wi.gov/ for information on these certifications.

4.5 Method of Award

The award shall be made in the best interest of the Agency, as determined by the Agency, to the Lowest Responsible Bidder(s) that meet(s) the requirements listed in this RFB. In the interest of promoting small business economic development, the agency intends to make multiple awards based on the capacity of each Vendor beginning with the lowest responsible bidder(s). In such case, the next-lowest bidder(s) will also be given the opportunity to be an awardee at their bid

price, until the needs of the Agency are met. Vendors must provide a written statement of the Volume (quantity) of work they can successfully complete to meet contract conditions (see cost sheet).

4.6 Intent to Award a Contract

Any Bidders that submit a Bid shall be notified in writing of the Agency's Intent to Award a Contract as a result of this RFB. After the notice of intent to award is issued, the public may inspect and copy RFB records during the Agency's normal business hours. Please contact the Agency in advance of Bid inspections to ensure the availability of space and staff.

4.7 Protest and Appeal Procedures

A written notice of a party's intent to protest an Award(s) (Intent to Protest) shall be received by the Agency's Chief Executive Officer no later than five (5) working days after issuance of the Intent to Award. A written protest shall be received by the Agency no later than ten (10) working days after issuance of the Intent to Award. Notices of an Intent to Protest and Protests shall be made in writing. Protests shall be as specific as possible and identify statutes, Wisconsin Administrative Code provisions, Wisconsin Weatherization Assistance Program policies and/or Department of Energy regulations that are alleged to have been violated. An Intent to Protest or Protest shall be submitted in writing to:

USPS Address
George Hinton, CEO
CR-Social Development Commission
1730 W. North Avenue
Milwaukee, Wisconsin 53205

Address for Hand-Delivery
George Hinton, CEO
CR-Social Development Commission
1730 W. North Avenue
Milwaukee, Wisconsin 53205

5. TECHNICAL PERFORMANCE REQUIREMENTS

5.1. All commodities and services purchased through this RFB shall meet standards and specifications set forth in the Wisconsin Weatherization Field Guide and/or Wisconsin Weatherization Program Manual. Relevant portions of the Guide and/or Manual are identified in this RFB as Attachment 4.

5.2. All proposed commodities shall be capable of performing all operations in accordance with manufacturer's advertised data sheets and technical publications. Please refer to Section 8. Additional Information Requirements, for a listing of required data sheets and technical publications that shall be submitted with this Bid.

5.3. When a commodity is required to meet the current Energy Star® standard it shall be labeled and listed on the Energy Star® website (http://www.energystar.gov/), and the following requirements apply:

- **a)** It shall conform to the set of criteria used by ENERGY STAR® to rate products.
- **b)** Products listed on the Energy Star® website are considered to meet current Energy Star® standards.
- **c)** Products shall conform to the standards scheduled to be in effect on July 1, 2021.
- **d)** If the RFB requires a product that is not readily available, a bidder shall notify the Procurement Coordinator immediately (see section 3.6).
- **e)** If a standard changes during the life of the contract and a product change is required, section 7 shall apply and a price adjustment may be negotiated.

5.4. All items Bid shall be the manufacturer's current production products and materials shall be first quality. Items that are used, floor models or demonstrators, obsolete or discontinued are unacceptable.

5.5. All debris related to installation including appliances and major mechanicals shall be removed and properly disposed of following applicable federal, state and local regulations.

5.6. The Contractor shall have available the following minimum diagnostic testing equipment for performance of this contract:

- **a)** Fully instrumented and calibrated blower door capable of measuring CFM50 (Cubic Feet Per Minute at 50 Pascals).
- **b)** Plate style air flow measuring equipment
- **c)** Combustion analyzer with the capacity to measure O2, CO, Steady State Efficiency, stack temperature.
- **d)** Computer equipped with the Wisconsin Diagnostic Workbook software.
- **e)** Digital Manometer, i.e. DG-3 or DG-700 or equivalent
- **f)** Thermal Imaging Camera (IR)
- **g)** Thermometers for measuring air and water temperature.
- **h)** Smoke generating equipment
- **i)** Personal CO monitor
- **j)** Gas leak detector and non-corrosive gas leak detection fluid

5.7. The Contractor is required to have available a digital camera capable of meeting the following requirement for photographs: Photographs shall be provided upon request (electronically or a digital scan of hard copy) to the Agency that document existing equipment or condition, installed equipment including manufacturer's nameplate or completed repairs. Photographs must be submitted for all call backs and State reworks.

6. CONTRACTOR PERFORMANCE REQUIREMENTS

6.1. Prime Contractor

The Prime Contractor shall be responsible for contract performance when subcontractors are used. When subcontractors are used, they shall abide by the terms and conditions of the contract. If subcontractors are used, the Contractor shall clearly explain their participation. The Agency shall reserve the right to approve the use of subcontractors in the fulfillment of the contract. (See Appendix A, Part A, Assignment).

6.2. Work Order, Work Flow and Job Completion

- **a)** The Contractor shall take receipt of work orders via email, fax or personal pickup at the Agency.

- **b)** The Contractor is responsible for contacting and arranging with the customer to provide the services that are part of performance under this contract.

- **c)** The Contractor shall complete the required work within (25) days of receipt of the Agency's job order unless otherwise agreed to in writing by the Agency.

d) The Contractor shall notify the Agency of job completion within (5) days by email, fax, telephone or personal delivery to the Agency.

6.3. Invoices, Required Documentation and Payment

a) The Contractor shall ensure that a valid invoice is received by the Agency within (5) days of job completion. A valid invoice shall include all required forms and other required information, provide cost information as required and shall be submitted after job completion. Failure to provide all required information creates an exception to prompt payment (good faith dispute).

b) Invoices presented for payment shall be submitted in accordance with Agency instructions. See Attachment 5.

c) The Agency shall make payment to the Contractor within thirty (30) days of receipt of a valid invoice providing goods and/or services have been delivered, installed (if required), and accepted as specified.

d) Any callback work shall be satisfactorily addressed before issuance of payment.

e) A good faith dispute creates an exception to prompt payment. The Agency shall provide written notification to the Contractor.

f) The Contractor shall provide the Agency with a copy of any and all documentation regarding problems or issues regarding job site performance, commodity performance and/or client issues.

g) The Contractor shall not, under any circumstances, seek payment from the owner or occupant of the premises improved under the Contract. The only recourse for payment for the work performed under the Contract is through the Agency.

h) The Contractor shall notify the Agency in writing of any changes to the list of subcontractors and suppliers providing materials and/or labor for weatherization services within ten (10) business days of the effective date.

6.4. Lien Waivers, Lien Notice Action and Recourse for Payment

By agreeing to perform weatherization work the Vendor agrees to the following terms and agrees to pass along the following requirements to their suppliers and any subcontractors:

a) The Vendor agrees that they will not, under any circumstances, seek payment from the owner or occupant of the premises improved.

b) The Vendor shall not file, suffer or permit any lien or other encumbrance of record as a claim against any site of a weatherization project in recognition that the only recourse for payment is from the weatherization agency.

c) Any lien notice action by a Vendor, and/or any of their subcontractors and/or material suppliers, against a property owner shall be considered non-performance by the terms and conditions of this contract, and the Vendor may be removed from the statewide weatherization agency bidder's list for a period of 2 to 5 years, as may any subcontractors and suppliers that take such action.

d) **PAYMENTS OWED BY VENDOR:** By engaging in a contract with the weatherization agency, the Vendor agrees that if they do not pay for materials and labor taking place through this weatherization contract, the weatherization agency has the option to use payments owed to the Vendor to pay such subcontractors and suppliers.

e) The Agency reserves the right to cancel this Contract in whole or in part without penalty, upon written notice to the Contractor if any lien notice action is taken by the Contractor, and/or any of their subcontractors and/or material suppliers, against a property owner.

f) Signed lien waivers for each individual work location/property are required (when the property to receive the improvement is identified) from all parties providing any labor and materials, including the Vendor. When lien waivers are required, the Vendor agrees to inform any party supplying labor and/or material to an identified property, prior to engaging such parties in providing weatherization services, that lien waivers are required in order for the Vendor to invoice the weatherization agency for the job. This applies whenever a specific property or properties to be improved is identified to the Vendor and any of their suppliers and/or subcontractors.

6.5. Warranties and Repairs

a) The Contractor shall provide the manufacturer's standard warranties on all items. In addition, a one (1) year service contract on commodities and labor is required for all work performed under this RFB. The one (1) year service contract shall commence on the date of installation completion or completion of any work required as a result of the installation inspection.

b) The Contractor shall furnish all warranty repairs or provide alternate source of local warranty repair at no extra cost to the Agency, the State of Wisconsin or the owner or occupant of the premises. Warranty repairs shall be performed within (10) days of notification.

c) The Contractor shall, at the direction of the Agency, correct or have corrected any work determined by the Agency or the State of Wisconsin to be substandard. Such corrective work shall be at no extra cost to the Agency, the State of Wisconsin or the owner or occupant of the premises. Corrective work shall be performed within (5) days of notification.

6.6. Failure to Perform

The Contract may be terminated for the Contractor's failure to comply with any of the specifications or conditions of the RFB or the Contract.

If the Contractor fails to provide commodities or services at a level of capacity (either volume or quantity) or quality acceptable to the Agency, the Agency may, at its discretion, (1) direct a corrective action plan, (2) suspend the Contract pending resolution of quality problems or (3) terminate the Contract for cause. If the Contract is terminated for cause, the Contractor may be removed from the statewide weatherization agency Bidder's list for a period of two to five years.

Failure to comply with Affirmative Action/Non-Discrimination conditions (Appendix A) may result in the Contractor becoming declared an "ineligible" contractor with the State (§16.765, Wis. Stats.), termination of the contract, or withholding of payment.

In the event a Contractor is (1) not able to meet the capacity (either volume or quantity) requirements of the Agency, (2) suspended or (3) terminated, the Agency may award a Contract under this RFB to the next Lowest Responsible Bidder or complete an alternate procurement.

6.7. Permits, Insurance and Other Requirements

a) The Contractor shall meet the insurance requirements specified in the terms and conditions. In addition, the Contractor shall provide a certificate of insurance listing CR-Social Development Commission as additional insured. Certificates of insurance shall be provided to the Agency within ten (10) working days of Notice of Intent to Award.

b) For all services contracts with the potential to exceed $149,999 annually and where wholesaler or subcontractor partnerships will be utilized to deliver weatherization services, a payment bond is required on the part of the contractor in the amount of $150,000 or the anticipated amount of the contract, whichever is greater. The anticipated amount of the contract shall be based upon the historical spend of the Agency, adjusted for any conditions in the best judgment of the Agency. The contractor shall provide proof of payment bond within thirty (30) business days of the receipt of the award letter. No work shall be awarded to a contractor until this proof is provided and verified by the local agency. A payment bond is one executed in connection with a contract to ensure payment to all wholesalers and subcontractors performing work under the contract.

c) The Contractor shall complete all required forms and return same to the Agency attached to the invoice, or as directed by the Agency. (See attachment 5 Valid Invoice Requirements)

d) Following the Intent to Award notification, the Contractor shall provide to the Agency its IRS Form W-9 (Request for Taxpayer Identification Number and Certification) and Affirmative Action plan/exemption Vendor Application Form (if not already an established Vendor), MBE and/or DBE certificates (if applicable), City of Milwaukee Contractor License, Asbestos O/M Certification for Field Staff, Lead Safe Company Certificate, Lead Safe Renovator Certifications for Field Staff, Safety Data Sheets (SDS), copy of written safety plan, Certificate of Insurance (see Appendix A for more information).

e) Any change in material of equal or superior quality or installation standards shall be specifically approved in writing by the Agency. Any deviation or exceptions to the terms, conditions and/or specifications shall be submitted in writing and approved by the Agency with a signed change order. No minimum fee is allowed on change orders.

f) Unless otherwise directed by the Agency, the Contractor is responsible for obtaining required state or local licenses and permits to perform work identified in this RFB. The Contractor shall be reimbursed for the actual cost of the permit only (no processing fee is allowed to be added on to the invoice). Therefore, do not include estimated permit costs when calculating bid price for each replacement.

g) The Contractor shall participate in any training required by the Agency. Depending upon the cost of such training, a retention agreement may be required.

h) If performance of the work provided through this RFB requires training and/or certification, the Contractor shall be required to demonstrate compliance as directed by the Agency within (60) days of a signed contract award. Performance of work under this contract requires the following training and/or certifications:

- Asbestos O&M Certificate for Field Staff
- Lead Safe Company Certificate
- Lead Safe Renovator Certificates for Field Staff

6.8. Customer Education and Other Contractor Requirements

a) The Contractor shall review proper operation and maintenance of all appliances (including filter replacement on forced air units) with the customer upon completion of the installation.

b) The Contractor shall place all installation and warranty information packets and material with the installed appliance.

c) The Contractor shall affix a clearly visible sticker identifying the Contractor's name, phone number and date of installation on each new mechanical appliance (e.g., furnace, boiler, water heater). The Contractor shall provide a document providing the Contractor's name, phone number and date of installation to the customer for other non-mechanical appliances (e.g., refrigerator).

6.9. Health and Safety

a) The Contractor shall comply with all applicable federal, state and local regulations affecting worker and customer safety.

b) The Contractor shall supply Safety Data Sheets (SDS) as directed by the Agency.

c) If the work provided through this RFB is subject to the requirements for Lead Safe and/or Asbestos requirements, see Appendix A, Part B, 14 and 15.

7. COST INFORMATION

7.1. Bid Pricing

a) The Bidder shall complete the Cost Sheets (Attachment 3) following the instructions provided on the Cost Sheets. Failure to submit unit pricing as instructed for any item listed in the Cost Sheets shall result in rejection of the Bid. Failure to submit required capacity information (volume or quantity) as instructed may result in rejection of the Bid. Do not alter the format of the Cost Sheets or it may result in rejection of the Bid.

b) The Bidder shall submit one fixed price per unit for the entire Contract period. If the Contract is renewed, the Contractor shall hold the fixed price per unit during the renewal period. Unit prices shown on the Bid or Contract shall be the price per unit of sale (e.g., gal., doz., ea.) as stated in the RFB or Contract. Price adjustments may be authorized by the Agency under limited circumstances (see Paragraph 7.3 Price Adjustments).

c) Bidders may not impose a markup or service charge on licenses or permits. Do not include the price of permits or payment bonds in the unit bid price. The Contractor is reimbursed for the actual cost of permits through the invoice process.

d) Bid prices include delivery of any installed products, installation, clean-up and removal of replaced product(s), and labor/material cost for any other tasks/items identified in the RFB or Attachments, unless specifically excluded.

7.2. Capacity

If required in the RFB cost sheet(s), the Bidder shall identify in writing as part of its Bid the volume of work and/or quantity of products it is able to handle in accordance with the Bid requirements.

7.3. Price Adjustments

The Contractor may lower a price at any time due to general market conditions or other considerations. Prices shall not be subject to any increase for ninety (90) calendar days from the date of the award. Any price increase proposed shall be submitted in writing to the Agency thirty (30) calendar days before the proposed effective date of the price increase, and shall be limited to fully documented cost increases to the contractor which are demonstrated to be industry wide. The Agency shall be the sole judge of whether a price increase shall be permitted, and shall either grant or reject the proposed increase in writing. The Agency reserves the right to reject any price increase that is deemed to be excessive.

8. ADDITIONAL INFORMATION REQUIREMENTS

8.1. Per Section 3.5 f), the Bidder shall include the following additional documents as part of its Bid package:

- Product data specification sheets are required to be submitted.
- A written list of subcontractors and suppliers, if any, providing materials and/or labor for weatherization services. The list shall include the company name, address, contact information, and a description of the materials and/or services that will be provided.

Attachment 1 - Vendor Information Form

AGENCY NAME _____ Bid # *05-1421*
Final Inspection & Energy Audit Services

Bidder/Vendor Company Name:			
Provide information for person authorized to complete and sign binding contracts			
Name of Owner/President/CEO			
Address (include Zip + 4)			
E-mail		Office Phone#	
Job title/position		Cell Phone#	
Provide information for person authorized to answer questions or clarify bid/proposal			
Name			
Address (include Zip + 4)			
E-mail		Office Phone#	
Job title/position		Cell Phone#	
Company Transactions – Provide information for person the Agency is to contact concerning orders and billings, and to receive Agency purchase orders			
Name			
Address (include Zip + 4)			
E-mail		Office Phone#	
Job title/position		Cell Phone#	
Company HR - Services/installation contracts only: Any Vendor/Contractor awarded over $50,000 on this contract must submit Affirmative Action information to the Agency. Provide information for the Personnel/Human Resource manager or other person responsible for company Affirmative Action plans.			
Name			
Address (include Zip + 4)			
E-mail		Office Phone#	
Job title/position		Cell Phone#	

Attachment 2A - Vendor Reference Form (Client)

AGENCY NAME _____ Bid # *05-1421*
Final Inspection & Energy Audit Services

References for Bidder/Vendor:	

Provide company or client information for customers purchasing three (3) or more installations or contracts for product(s) and/or service(s) similar to those included in this RFB, within the past three (3) years. If any third party/sub-contractor(s) will be used to fulfill the terms of a contract awarded in accordance with this bid, duplicate this page to provide required information for any and all subcontractor parties.

By providing these references, Bidder/vendor authorizes any person/company named as a reference to provide to the Agency all reasonable and customary business reference information regarding the bidder. The provision of references constitutes permission for the companies/persons to provide, and the Procurement Manager to receive, any information deemed to be necessary to assess whether the bidder can meet the requirements of this RFB. Information provided that is deemed to be confidential shall be identified as such when provided, and the Procurement Manager shall maintain the confidentiality of all information so designated.

#1 Company Name			
Address (include Zip + 4)			
Contact Person		Phone No.	
Product(s)/Service(s) (describe)			
#2 Company Name			
Address (include Zip + 4)			
Contact Person		Phone No.	
Product(s)/Service(s) (describe)			
#**3 Company Name**			
Address (include Zip + 4)			
Contact Person		Phone No	
Product(s)/Service(s) (describe)			
#**4 Company Name**			
Address (include Zip + 4)			
Contact Person		Phone No	
Product(s)/Service(s) (describe)			
#**5 Company Name**			
Address (include Zip + 4)			
Contact Person		Phone No	
Product(s)/Service(s) (describe)			

Attachment 2B - Vendor Reference Form (Financial)

AGENCY NAME _____ Bid # *05-1421*
Final Inspection & Energy Audit Services

References for Bidder/Vendor:			
Financial information: Provide contact information for credit references, (financial institutions, equipment wholesalers, etc.) that may be contacted to verify financial stability. By providing these references, Bidder/vendor authorizes all persons/companies named as a reference to provide to the Agency all reasonable and customary business reference information regarding the bidder.			
#1 Company Name			
Address (include Zip + 4)			
Contact Person		Phone No.	
Description of work			
#2 Company Name			
Address (include Zip + 4)			
Contact Person		Phone No.	
Description of work			
#**3 Company Name**			
Address (include Zip + 4)			
Contact Person		Phone No	
Description of work			
#4 Company Name			
Address (include Zip + 4)			
Contact Person		Phone No	
Description of work			

Source: Wisconsin Weatherization Program Manual and Wisconsin Weatherization Field Guide, found on the Home Energy Plus website at **www.homeenergyplus.wi.gov**

FINAL INSPECTOR/AUDITOR

- ***Prerequisites***
  - Possess *Safe Work Practices* competencies.
  - Possess a working knowledge of building science principles.

SAFE WORK PRACTICES

All field workers must exhibit safe work practices by possessing the following competencies.

- Possess a working knowledge of:
  - U.S. Department of Energy (DOE) program regulations/policy and Environmental Protection Agency (EPA) guidelines for asbestos, lead, mold, and other health hazards;
  - Occupational Safety and Health Act (OSHA) standards:
    - Ladder Safety;
    - Fall protection;
    - Personal protective equipment;
    - Respiratory protection;
    - Motor vehicles;
    - Power-operated hand tools;
    - Fire prevention;
    - Other worker-related OSHA standards.
- Demonstrate the ability to:
  - Select, fit, and use the appropriate Personal Protection equipment for a particular task;
  - Safely use basic hand and power tools;
  - Work in an asbestos and lead safe manner;
  - Identify serious mold conditions;
  - Identify electrical issues, such as knob and tube;
  - Assess work area safety hazards.
- ***Inspection and Measurement***
  - Possess a working knowledge of:
    - Air and heat flow in buildings;
    - Factors that affect building heat loss;
    - Construction features and critical junction points of common housing types;
    - Insulation R-values;
    - Different insulation materials and installation techniques;
    - Various air-sealing techniques and appropriate materials;
    - Bypasses from unit to exterior;
    - Causes of and remedies for existing and potential moisture problems;
    - Causes of and remedies for other existing and potential indoor air quality problems;
    - Residential mechanical ventilation systems;
    - Minimum ventilation rates/building tightness limits based on the appropriate ASHRAE 62.2 standard;
    - Electric base-load usage.
  - Demonstrate the ability to:
    - Measure the dimensions of floors, walls, ceilings, windows, doors, and compute surface areas;
    - Compute the volume of conditioned space of a building;
    - Define the thermal envelope of a building;
    - Assess the effectiveness of existing insulation and the effective R-values;
    - Measure and record insulation in all areas; such as attic, sill box, walls, foundation, floor, etc., if applicable, using equipment such as an infrared camera;
- ***Diagnostic Testing***
  - Blower door:
    - Possess a working knowledge of:
      - Principles of air movement and how they relate to building heat loss;
      - Typical air leakage problems in common housing types;
      - Minimum ventilation Rates.
    - Demonstrate the ability to:
      - Prepare a building for a blower door test; and perform blower door tests on all jobs, documenting the results on required Diagnostic testing forms.
  - Zone pressure diagnostics
    - Possess a working knowledge of:
      - The air barrier of a building and the importance of aligning it with the thermal barrier;
      - Primary and intermediate zones of a house.
    - Demonstrate the ability to:
      - Conduct zone pressure diagnostics and interpret results;
      - Determine the location and effectiveness of the air barrier of a house.

- Duct testing
  - Possess a working knowledge of:
    - Problems associated with different types of duct leakage.
  - Demonstrate the ability to:
    - Determine dominant duct leakage; and inspect ductwork for registers in the basement/CAZ;
    - Measure room pressure imbalances in houses with forced-air systems.
- Exhaust Ventilation Testing
  - Perform and document air flow test of all exhaust fans in the dwelling.
- Steam and hot water distribution system testing
  - Possess a working knowledge of the components of typical steam and hot water distribution systems and the characteristics of their proper operation.

- ***Combustion Appliance Safety***
  - Possess a working knowledge of:
    - Common code requirements related to:
      - Vent system sizing, materials, clearances, and installation;
      - Safety shut-off devices;
      - Gas line sizing;
      - Combustion air;
    - Causes of and remedies to common vent system problems.
  - Demonstrate the ability to:
    - Measure the CO level in ambient air;
    - Perform and document required tests on vented and unvented combustion appliances;
    - Measure the CO levels of gas fired ovens;
    - Understand the difference between as-measured and air free CO readings;
    - Detect natural gas and fuel oil leaks on all exposed piping;
    - Identify the Combustion Appliance Zone to assure sufficient volume for combustion air and document results;
    - Conduct worst case depressurization and draft testing of combustion appliances in the CAZ and document results;
    - Conduct basic temperature-rise on forced-air furnaces;
    - Measure the steady-state efficiency of a vented combustion appliance;
    - Identify inadequacies with supply and return ducting for forced-air heating systems.
- ***Measure Selection***
  - Possess a working knowledge of:
    - What materials are allowed to be installed based on the Wisconsin Weatherization Manual, available at www.homeenergyplus.wi.gov/ ;
    - The regulatory and policy requirements for selecting weatherization measures using WISWAP, DOE approved energy audit software including NEAT or MHEA and priority lists.
  - Demonstrate the ability to:
    - Select the proper LED to replace incandescent lamps;
    - Inspect refrigerators and freezers and make replacement recommendations based on protocol in the Wisconsin Weatherization Manual.
- ***Work Scope Development***
  - Demonstrate the ability to:
    - Accurately estimate the type and quantity of materials required to cost-effectively weatherize an eligible dwelling unit;
    - Accurately identify and document all weatherization measures required to properly weatherize a unit including Health & Safety and repair issues;
    - Prepare clearly written data collection reports.

Additional Information

In general, an Energy Audit consists of the following elements:

-Receive customer Package from Agency
-Schedule the Audit and notify the Agency of schedule
-Perform the on-site Audit
-Obtain customer signature on required forms
-Prepare customer work agreement and necessary information for the Agency, including electronic field data collection form, and photographs.
-Deliver completed audits
-Be available to attend the mandatory monthly quality assurance meeting.

REQUIRED EQUIPMENT

Equipment required to complete an Energy Audit includes: Blower door with digital gauge, draft hood (measure exhaust fan CFM and duct pressures), combustion analyzer, personal CO monitor, gas leak detector and gas leak bubble solution, flow meter, thermal imaging (IR) camera, digital camera, computer capable of operating Microsoft Office applications, email, web access and any additional equipment deemed necessary by the Agency.

ATTACHMENT 4 PART 2 Contractor Requirement Specification
Final Inspection & Energy Audit Services – RFB# 05-1421

1. Successful bidder must have been performing final inspections/energy audits or related work in weatherization for at least 1 year, and must have extensive knowledge of the Wisconsin Weatherization manual and performance standards. They must have demonstrated experience in providing residential energy auditing services similar to that described in this RFB.
2. Successful bidder must be in good standing with the State of Wisconsin EPLS and the Agency.
3. Successful bidder must demonstrate an administrative capacity to complete the necessary data entry and paperwork.
4. Successful bidder must be able to begin work within 90 days of the award of this contract.
5. Successful bidder must provide final inspectors/energy auditors experienced in weatherization such as that described in this RFB and its attachments. Resumes and certifications to be submitted for all staff.
6. Successful bidder must employ and provide qualifications such as: experience and credentials of each proposed energy auditor to complete work under this contract. These employees must also show photo identification at all home visits and have undergone criminal background checks by contractor.
7. Successful bidder will be required to:
    a. Have the physical ability to enter crawl spaces, attics, other confined areas, climb a ladder, walk on roofs, and any other physical labor necessary to complete the energy audit;
    b. Have the ability to converse and write in the English language;
    c. Be skilled in the use of computers and current common software programs.
8. An employee of the agency may accompany the contractor onsite visits if it is determined to be in the best interest of the agency.
9. Contractor will perform final inspections/energy audits that satisfy the requirements of the Agency's contract with DOA/DEHCR (Department of Administration, Department of Energy, Housing & Community Resources), including requirements found in the Wisconsin Weatherization Manual, and the Wisconsin Weatherization Field Guide which can be found at www.homeenergyplus.wi.gov.
10. Successful bidder (s) will receive all customer information and data collection forms from the agency.
11. Contractor is required to complete energy audits of all units in the building and is responsible to schedule and coordinate home visits directly with the customer or landlord. The contractor is required to notify the agency of site visits as they are scheduled.
12. In the event the contractor is unable to make contact with the customer(s) to complete services, the final inspection/energy audit information must be returned to the agency along a completed no contact form (recording date, time and method of contact). A minimum of three documented attempts of customer contact are required, one of which is a drive by visit.
13. The contractor is required to return final inspections/energy audits within 10 days of their award. Completed final inspections/energy audits must be hand delivered to the agency's weatherization office or delivered by other means as agreed upon by both parties.
14. The Agency will use all field data and photos collected to generate the electronic energy audit (NEAT/MHEA) and develop a work scope for award to contractors.

Attachment 5 – Final Inspection & Energy Audit Services
RFB # 05-1421 – Valid Invoice Requirements – Instructions & Required Documents

Invoices presented for payment shall be submitted in accordance with the RFB requirements and the following Agency instructions.

The following information shall be provided to the Agency (with, or prior to, the invoice):

	Required documentation	Initial Assessment	Final Invoice
1	Invoice reflecting the nature and cost of work performed.	Yes	Yes
2	Pre-approval of all additional work to be performed outside the original scope of work, a description of the work and the associated cost.	Yes	Yes
3	Explanation of any deviations from normal procedure.	Yes	Yes
4	A copy of any and all documentation including photographs, regarding problems or issues regarding job site performance, commodity performance and/or client issues.		Yes
5	Photographs of all inspected work. (electronic) - see section 5.7 of RFB 05-1421 & Attachments 11 & 12 Mandatory Photos for Energy Audits, Final Inspections and Pre-inspections.		Yes
6	Generated electronic diagnostic workbook. (Energy Audit)		Yes
7	Completed electronic diagnostic workbook. (Final Inspection)		Yes
8	Completed Agency documentation; work agreement, release of liability, health & safety checklist, sidewall insulation agreement, lighting installation report, field data collection form and any other site-specific required documentation – review all RFB 05-1421 attachments. (Energy Audit)		Yes
9	Completed Agency Onsite Final Inspection checklist with all items reviewed marked as pass or fail – Attachment 6. (Final Inspection)		Yes
10	Completed page 4 of 5 or page 5 of 6 of Agency work agreement signed by owner – Attachments 15 or 16. (Final Inspection)		Yes
11	Completed Customer Satisfaction Survey		Yes
12	Lien Waiver(s).		Yes
13	Photographs documenting lead safe weatherization practices if applicable to scope of work. (Energy Audit)		Yes

Wisconsin Weatherization

Final Inspection Checklist

WisWAP BID:		**Unit:**	
Customer:			
Agency:		**Agency Job #:**	
Inspector:		**Date:**	

All diagnostic testing shall be recorded in the diagnostic workbook.

Air Sealing	**Yes**	**No**	**N/A**
Attic bypasses and key junctures sealed	○	○	○
Wall bypasses and key junctures sealed	○	○	○
Foundation bypasses and key junctures sealed	○	○	○
Minor air sealing completed	○	○	○
Documentation explaining why minor air sealing not completed	○	○	○
Whole house and/or local ventilation installed and meets Wisconsin Weatherization standards	○	○	○

Inspector Comments:

Heating System Replacement with New Thermostat Install	**Yes**	**No**	**N/A**
Thermostat installed properly and meets Wisconsin Weatherization requirements	○	○	○
No gas leaks are present in home	○	○	○
Heating system replacement checklist fully and accurately completed by HVAC technician	○	○	○
Manual and warranty on or near heating system	○	○	○
HVAC technician/company name and contact information sticker on heating system	○	○	○
Heating system properly sized with industry accepted sizing calculation	○	○	○
Dedicated circuit is properly sized and shut off switch is properly located	○	○	○
Furnace plenums and drops sealed to furnace cabinet (new installations)	○	○	○
Heating system set on blocks or above known flood levels in foundation	○	○	○
Venting installed per manufacturer instructions and/or NFPA	○	○	○
Condensate removal goes to proper drain, and is not a tripping hazard	○	○	○
Mobile Home furnace approved for mobile homes, meets Wisconsin Weatherization standards, and does not extend past existing unit footprint	○	○	○
Boiler system has backflow preventer, fill valve, pressure relief valve, and expansion tank	○	○	○
Boiler outdoor reset or equivalent installed to manufacturer instructions, heating curve recorded on installation checklist	○	○	○

Installed heating system SSE	High Fire:	Low Fire:	AFUE:	☐
Installed heating system CO_2/CO	High Fire:	Low Fire:	AFUE:	☐

Heating system temperature rise	PMI:	Supply:	Return:	Total:	☐

Inspector Comments:

Heating System Clean and Tune	**Yes**	**No**	**N/A**
No gas leaks are present in the home	○	○	○
Clean and Tune checklist fully completed by HVAC technician	○	○	○
Visual assessment of clean and tune	○	○	○

SSE improvement from auditor test	SSE:	☐
CO improvement from auditor test	CO:	☐

Heating system temperature rise	PMI:	Supply:	Return:	Total:	☐

Inspector Comments:

Heating System Distribution	Yes	No	N/A
Filter rack sealed and easy to replace filter installed	○	○	○
Six 1-2 inch or one 3 inch MERV 6 or better filters left with customer	○	○	○
Distribution in unconditioned spaces properly sealed and insulated	○	○	○
Duct sealing completed per diagnostic workbook guidance	○	○	○
No return grilles in CAZ	○	○	○
Inspector Comments:			

Water Heater	Yes	No	N/A
Water temperature 120°F, not more than 125°F	○	○	○
Plumbing technician/company name and contact information sticker on water heater	○	○	○
GFCI outlet for power-vented water heater	○	○	○
TPR valve and piping installed according to Wisconsin Weatherization standards	○	○	○
Venting installed per manufacturer's instructions and/or NFPA	○	○	○
Meets or exceeds Wisconsin Weatherization minimum efficiency standards	○	○	○
Chimney liner installed for orphaned water heater *(if required)*	○	○	○
Abandoned chimney sealed	○	○	○
No gas leaks are present in the house	○	○	○
Inspector Comments:			

Foundation – Insulated to NEAT/MHEA specified R-Values and program specifications	Yes	No	N/A
Sill boxes insulated to Weatherization Assistant specified R-Value	○	○	○
Interior foundation insulated to Weatherization Assistant specified R-Value	○	○	○
Exterior foundation insulated to Weatherization Assistant specified R-Value	○	○	○
Floors/MH Bellies insulated to Weatherization Assistant specified R-Value	○	○	○
Continuous plastic vapor retarder over soil surfaces installed and sealed	○	○	○
Thermal barrier present separating living area *(if 2-part foam used)*	○	○	○
Water piping and ductwork *(if duct work is not insulated)* on warm side of insulation	○	○	○
Inspector Comments:			

Sidewall – Insulated to NEAT/MHEA specified R-Values and program specifications	Yes	No	N/A
Walls insulated to Weatherization Assistant-specified R-Value and meets Wisconsin Weatherization standards	○	○	○
Identified wiring hazards documented in sidewalls if not repaired	○	○	○
Inspector Comments:			

Attic Prep	Yes	No	N/A
Attic access insulated to final attic R-Value and is sealed properly	○	○	○
Electric junction boxes flagged	○	○	○
Live knob and tube ≥ 3 inches from insulation	○	○	○
Approved boxing ≥ 3 inches around can lights *(unless retrofit used including documentation)*	○	○	○
Approved damming ≥ 2 inches around active chimney	○	○	○
Vapor retarder on warm side of insulation	○	○	○
Attic venting clear of insulation	○	○	○
Attic ventilation chutes installed as required	○	○	○
No visible roof leaks are present and active chimney is in safe condition	○	○	○
Inspector Comments:			

Attic Insulation – Insulated to NEAT/MHEA specified R-Values and program specifications	**Yes**	**No**	**N/A**
Unfloored attics insulated to Weatherization Assistant specified R-Value	○	○	○
Floored attics insulated to Weatherization Assistant specified R-Value	○	○	○
Roof rafter attic insulated to Weatherization Assistant specified R-Value	○	○	○
Kneewall attic insulated to Weatherization Assistant specified R-Value	○	○	○
Insulation depth markers installed	○	○	○
Insulation certificate fully completed and posted in proper location	○	○	○
Inspector Comments:			

Refrigerator	**Yes**	**No**	**N/A**
Model installed meets program specifications	○	○	○
Door hinged for occupant convenience	○	○	○
Level, doors seal tightly, and all trim installed	○	○	○
Installed in location covered by warranty	○	○	○
Existing or bounty appliance removed and properly disposed	○	○	○
Inspector Comments:			

Freezer	**Yes**	**No**	**N/A**
Energy star model installed	○	○	○
Level, doors seal tightly, and all trim installed	○	○	○
Installed in location covered by warranty	○	○	○
Existing or bounty appliance removed and properly disposed	○	○	○
Inspector Comments:			

Minor Measures	**Yes**	**No**	**N/A**
CFL/LED lighting installed to Wisconsin Weatherization program specifications and requirements	○	○	○
All halogen torchieres replaced, removed and properly disposed	○	○	○
CO alarms installed where required	○	○	○
Smoke alarms installed where required	○	○	○
Dehumidifier installed to Wisconsin Weatherization program specifications and requirements	○	○	○
Inspector Comments:			

Repairs	**Yes**	**No**	**N/A**
Dryer venting meets Wisconsin Weatherization program specifications and requirements	○	○	○
Plumbing repairs meet Wisconsin Weatherization program specifications	○	○	○
Electrical repairs meet Wisconsin Weatherization program specifications	○	○	○
Structural repairs meet Wisconsin Weatherization program specifications	○	○	○
Pressure boundary meets Wisconsin Weatherization program specifications	○	○	○
Inspector Comments:			

Window	**Yes**	**No**	**N/A**
ENERGY STAR® window installed *(basement windows exempt from ENERGY STAR requirement)*	○	○	○
Operates easily	○	○	○
Tempered glass installed according to Wisconsin Weatherization program specifications	○	○	○
Documentation and photos of existing window supports replacement	○	○	○
Inspector Comments:			

Door	Yes	No	N/A
Meets minimum R-value requirement	○	○	○
Operates easily and latches securely	○	○	○
Tempered glass installed according to Wisconsin Weatherization program specifications	○	○	○
Documentation and photos of existing door supports replacement	○	○	○
Inspector Comments:			

Lead Safe Work and Asbestos Safe Work	Yes	No	N/A
Lead Safe Work photos and forms completed on all measures *(if required)*	○	○	○
Asbestos safe work practice photos and forms completed on all measures *(if required)*	○	○	○
Proper notification given to governing authorities for asbestos related work *(if required)*	○	○	○
Asbestos testing results and sample locations documented	○	○	○
Inspector Comments:			

Customer Education	Yes	No	N/A
Furnace filter replacement	○	○	○
Warranties	○	○	○
Appliance and related component operations and maintenance	○	○	○
Ventilation	○	○	○
Review of safety precautions	○	○	○
Inspector Comments:			

Attachment 7 RFB# 05-1421 Final Inspection and Energy Audit Services
Clean and Tune Requirements

(Gas and Oil)

1. Perform Steady State Efficiency testing.

2. Brush and vacuum dirt, rust, and debris from heat exchanger and burner surfaces and inspect the heat exchanger after removing burner assembly. Clean and adjust the burners and controls.

3. Clean and adjust pilot assembly. Test pilot safety system.

4. Test, reset or replace any and all safety and control devices as necessary, necessary replacements part are billed at cost plus bid mark-up percentage. Check limit control, igniter, and flame sensor. Replacement parts need authorization from the Agency prior to their installation.

5. Clean/replace air filters as needed. Install one filter in the unit and leave five (5) extra disposable filters, instruct customer on furnace filter changing and educate on the frequency of inspection and replacement. A single washable filter may be substituted for disposable filters with customers consent, submit customer signature of approval with invoice. If a media filter is in place, install a replacement media filter if needed but leave no extra, if not needed leave one (1) extra.

6. All forced air heating systems which accommodate a filter must have a filter rack cover which provides a proper seal, if none present one is to be installed. Filter rack cover should have no sharp edges and be easily removed or opened for easy filter replacement. If filter rack replacement is required, approval from the Agency needs to be given prior to its replacement.

7. Check the following for general safe operation of the heating unit:
    a. Ensure vent connectors for all combustion appliances to the chimney are free of rust, deterioration, contain (3) mechanical fasteners per connection and have adequate slope to maintain minimum draft requirements.
    b. Draft diverters for proper draft and possible spillage (see Infiltration Section for more information)
    c. Heating system wiring.
    d. Check thermo coupling for proper operation and replace if necessary.

8. Inspect, adjust and calibrate thermostat as needed. Using an ammeter at thermostat, set heat anticipator. Add .25 to the amperage reading on high efficiency furnaces.

9. Perform C.O. test on gas furnaces. Set burners, using a combustion analyzer to determine peak efficiency. (100 PPM maximum for gas.)

10. On oil-fired units, perform smoke test. Levels should be in the range of 0 to 2, photo of smoke test results to be submitted with invoice. Nozzles should be replaced and electrodes should be set. Oil filters should be replaced.

11. Lubricate moving parts.

12. Check chimney or flue for blockage.

13. Check all atmospheric combustion appliances for proper draft; perform Worst Case Depressurization and draft testing and document results when directed by the Agency.

Clean and Tune Requirements (continued)

14. Check for fuel leaks on **all** accessible lines. The first 5 leaks must be repaired at NO COST to the agency. Call office if more than 5 leaks per unit exist. You must follow the gas leak protocol listed below:
    a. Gas leak test must be done prior to the start of any repair or replacement work.
    b. Additional leaks requiring repair, identified beyond the 5 included, must be approved for repair by the Project Manager or Field Supervisor prior to their completion.
    c. Contractor must repair all gas leaks prior to leaving job.
    d. Gas leaks located by the Final Inspector or during a Quality Control Inspection must be addressed immediately upon notification if directed to do so.

15. Clean blower fan and blower compartment. Remove and clean blower motor, and check blower speeds.

16. Inspect blower belt, adjust tension, and replace as necessary.

17. Measure temperature rise.

18. Post inspection SSE test.

19. A/C coil cleaning if needed; pre authorization and pre and post photo documentation is required.

20. Test and adjust gas pressure.

21. Fill out the Clean and Tune Check list completely. Post a copy on the return air of a furnace or the cabinet of a boiler in an appropriate sleeve mechanically fastened, submitting another with the invoice.

Wisconsin Weatherization

Replacement Gas Furnace Checklist

Customer: _____ Contractor: _____

Brand: _____ Model #: _____

Date Installed: _____ Serial #: _____

WisWAP BID: _____ **OR** WHEAP App#: _____

Check box, enter test results or requested number as item is inspected or completed. Indicate "N/A" if not applicable.

PMI = Per Manufacturer's Instructions. **Fuel Type:** ☐ **Natural Gas or** ☐ **Propane**

INSPECTION & ADJUSTMENTS

Documents:
- ☐ Photos documenting furnace conditions and manufacturer nameplate provided to Agency
- ☐ Installation information sticker (installer name, phone number, date)
- ☐ Warranty and manual in envelope attached to furnace ☐ Agency given copy of sizing calculation
- ☐ Design temperature heat loss: _____ BTU per hour @ _____ degrees F. design temp

Electrical:
- ☐ Service disconnect is present and operational ☐ Dedicated circuit and breaker properly rated
- ☐ Set thermostat heat anticipator (thermostat) PMI ☐ Not applicable

Gas Piping:
- ☐ Sized for BTUs of all appliances ☐ No leaks ☐ Shut off present
- ☐ Sediment trap present ☐ CSST bonded

Air Filter:
- ☐ Filter opening covered/sealed ☐ Filter removes easily with no obstructions
- Filter Size: _____ x _____

General:
- ☐ Furnace elevated off basement floor. Note: If not in basement, can be on floor if approved PMI
- ☐ Combustion air and exhaust piping properly installed, terminated and supported
- ☐ Distribution plenums sealed and all major duct leaks properly sealed per specifications
- ☐ Condensate properly drained per local code and PMI ☐ Test holes sealed
- ☐ Orphaned water heater has proper draft (see p. 2) ☐ Permit required

Installed and Measured BTUs of New Furnace:

BTUs (high input): _____ Measured Input (2 cu. ft. of gas): _____ Minutes: _____ Seconds: _____

BTUs (low input): _____ (if applicable) Measured Input (2 cu. ft. of gas): _____ Minutes: _____ Seconds: _____

Measured Gas Pressure in Inches of Water Column(IWC):

Input (High): _____ Input (Low) – if applicable: _____ Manifold (High): _____ Manifold (Low): _____

Enter test result. Indicate "N/A" if installation is a space heater.

PERFORMANCE TESTING

Steady State Efficiency Test

Adjust to Achieve Typical Ranges for Gas Burning Appliances (see page 2)

SSE %	O2%	CO PPM	Intake Air °F	Flue °F	PMI AFUE%

Distribution Static Pressure

☐ IWC or ☐ Pa

	Return	Supply	Total Pressure
High Input			
Low Input			

Temperature Rise

Supply °F	Return °F	(Supply – Return)	PMI Min	PMI Max

Variable Speed Furnaces	Heating CFM*	Fan Speed Setting
High Input		
Low Input (if applicable)		

*CFM Measurement Method: ☐ Plate Method ☐ Fan Tables ☐ Other: _____

I certify the visual inspection and performance tests were completed as indicated.

Installer Signature: _____

Printed Name: _____

Date: _____

I certify the heating system was installed to my satisfaction on the date indicated.

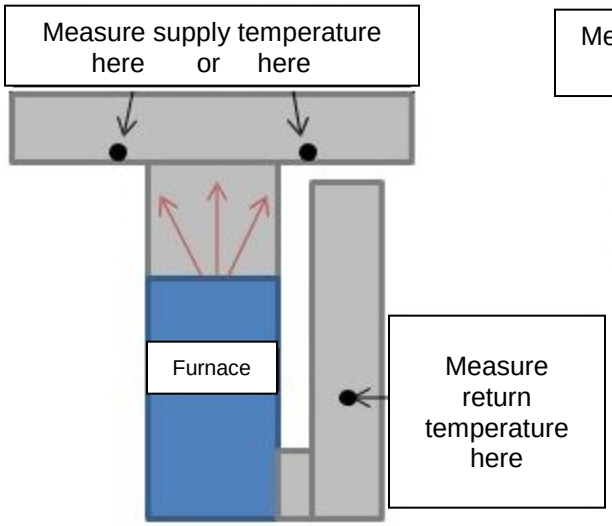
Customer Signature: _____

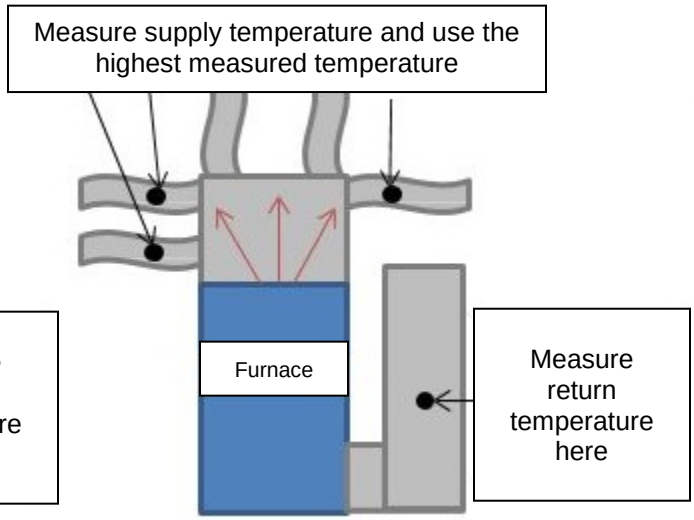
Printed Name: _____

Date: _____

Natural Gas and Propane Specifications

Generally accepted ranges, excerpted from the Weatherization Field Guide. Always follow manufacturer's instructions if they differ from listed typical specifications. Examples of temperature rise testing procedures below.





Typical Ranges for Gas Burning Appliances

Acceptable Draft Test Readings for Gas Appliances with Respect to Outdoor			
	<10° F.	**10°-90° F.**	**>90° F.**
Draft (Pa)	-2.5	(°F Out / 40) - 2.75	-0.5
Draft (IWC)	-.010	(°F Out / 10,000) - 0.011	-.002

Performance Indicator	**SSE 80+**	**SSE 95+**
Carbon monoxide (CO) ppm as-measured	≤ 100	≤ 100 or PMI
Stack temperature °F	325°- 450°	90°- 120°
Temperature Heat Rise °F	40° - 70°	45° - 70° or PMI
Oxygen (O_2) %	4 - 9%	4 - 9%
Natural gas pressure output at manifold - Inches of Water Column (IWC)	3.2 - 3.9 IWC	3.2 - 3.9 IWC
Propane pressure output at manifold (IWC)	10-11 IWC	10 – 11 IWC
Steady-state efficiency (SSE)	82 - 86%	95 - 97%
Supply temperature °F	120° - 140°	95° - 140°

Comments:

Wisconsin Weatherization
Replacement Oil Furnace Checklist

Customer: _____ Contractor: _____

Brand: _____ Model #: _____

Date Installed: _____ Serial #: _____

WisWAP BID: _____ **OR** WHEAP App#: _____

Check box, enter test results or requested number as item is inspected or completed. Indicate "N/A" if not applicable.

PMI = Per Manufacturer's Instructions.

INSPECTION & ADJUSTMENTS

Documents:	☐ Photos documenting furnace conditions and manufacturer nameplate provided to Agency	
	☐ Installation information sticker (installer name, phone number, date)	
	☐ Warranty and manual in envelope attached to furnace	☐ Agency given copy of sizing calculation
	☐ Design temperature heat loss calculation: _____ BTU per hour	
Electrical:	☐ Service disconnect is present and operational	☐ Dedicated circuit and breaker properly rated
	☐ Set thermostat heat anticipator (thermostat) PMI	☐ Not applicable
Fuel Supply:	☐ New fuel filter	☐ Tank and lines comply with NFPA 31
	☐ No leaks	☐ Purged fuel lines
Air Filter:	☐ Filter opening covered/sealed	☐ Filter removes easily with no obstructions
	Filter Size: _____ x _____	
General:	☐ Furnace elevated off basement floor	
	☐ Acceptable clearances of heating unit and vent connector to nearby combustibles per NFPA 31	
	☐ Distribution plenums sealed; all major duct leaks properly sealed per specifications	
	☐ Chimney inspected for compliance with NFPA 211	☐ Test holes sealed
	☐ Barometric damper control operates properly	☐ Permit required

Measured BTUs of New Furnace:

BTUs (input): _____ Nozzle GPH: _____ Nozzle Angle: _____ ° Nozzle Spray Type: _____

Note: The oil nozzle information is required to be posted on the furnace with the date of installation.

Measured Oil Pressure:

PMI _____ PSI Measured _____ PSI

PERFORMANCE TESTING

Draft Measurements		
Flue Draft		Before barometric damper 10 – 15 Pa or 0.04-0.06 IWC or PMI
Overfire Draft		Must be a minimum of 5 Pa. or 0.02 IWC or PMI

Measured Smoke Number	
Smoke Spot Scale #:	

Steady State Efficiency Test

Adjust to Achieve Typical Ranges for Oil Burning Appliances (see page 2)

SSE %	O2%	CO PPM	Intake Air °F	Flue °F	PMI AFUE%

Distribution Static Pressure

☐ IWC / ☐ Pa	Return	Supply	Total Pressure

Temperature Rise

Supply °F	Return °F	(Supply – Return)	PMI Min	PMI Max

Air Flow Rate Testing	Heating CFM*	Fan Speed Setting
High Input		

*CFM Measurement Method: ☐ Plate Method ☐ Fan Tables ☐ Other: _____

I certify the visual inspection and performance tests were completed as indicated.

Installer Signature: _____

Printed Name: _____

Date: _____

I certify the heating system was installed to my satisfaction on the date indicated.

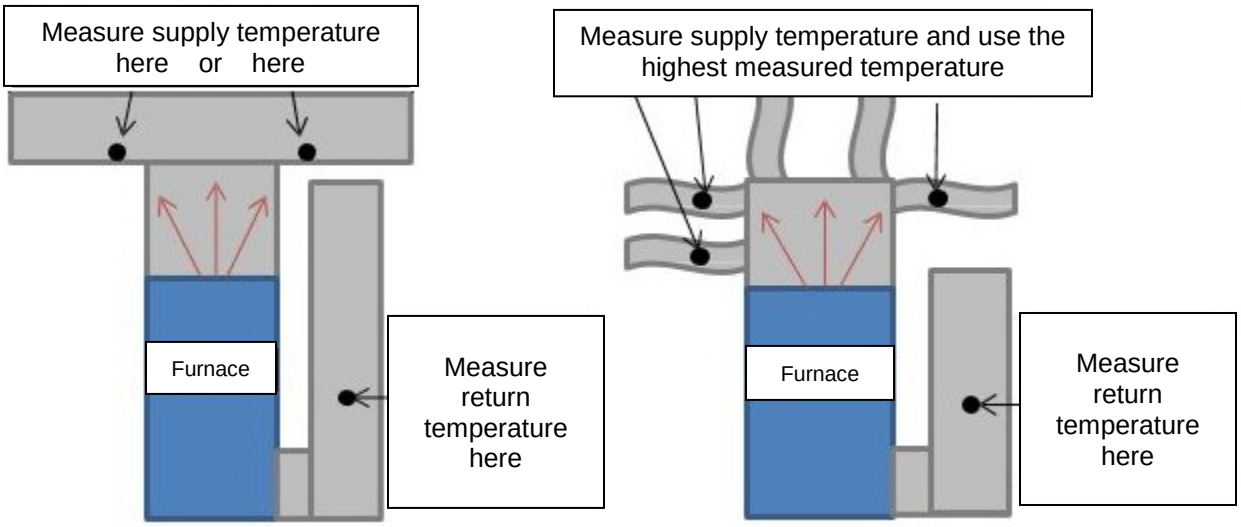
Customer Signature: _____

Printed Name: _____

Date: _____

Fuel Oil Heating System Specifications

Generally accepted ranges, excerpted from the Weatherization Field Guide. Always follow manufacturer's instructions if they differ from listed typical specifications. Examples of temperature rise testing procedures below.



Typical Ranges for Oil Burning Appliances

Performance Indicator	Flame Retention
Carbon Monoxide (CO) ppm as-measured	≤ 100
Stack Temperature °F	300°- 450°
Oxygen (O_2) %	5 - 9%
Smoke Number (0-9)	< 1
Oil Pressure Pounds per Square Inch (psi)	PMI or 100 – 150
Over-fire Draft (Inches of Water Column	-0.02 IWC or -5 Pa
Flue Draft (IWC)	-0.04 to -0.06 IWC -10 to -15 Pa
Steady-State Efficiency (SSE)	≥ 80%

Comments:

Wisconsin Weatherization
Replacement Boiler Checklist

homeenergy+

Customer: _____ Contractor: _____
Brand: _____ Model #: _____
Date Installed: _____ Serial #: _____
WisWAP BID: _____ **OR** WHEAP App#: _____

Check box, enter test results or requested number as item is inspected or completed. Indicate "N/A" if not applicable.
PMI = Per Manufacturer's Instructions. **Fuel Type:** ☐ **Natural Gas** ☐ **Propane** ☐ **Oil**

INSPECTION & ADJUSTMENTS

Documents:	☐ Photos documenting boiler conditions and manufacturer nameplate provided to Agency. ☐ Installation information sticker (installer name, phone number, date) ☐ Warranty and manual in envelope attached to boiler ☐ Agency given copy of sizing calculation ☐ Design temperature heat loss: _____ BTU per hour @ _____ degrees F. design temp
Electrical:	☐ Service disconnect is present and operational ☐ Dedicated circuit and breaker properly rated ☐ Set heat anticipator (thermostat) PMI ☐ Not applicable
Gas Piping:	☐ Sized for BTUs of all appliances ☐ No leaks ☐ Shut off present ☐ Sediment trap present ☐ CSST bonded
Fuel Oil:	☐ New Fuel Filter ☐ No leaks ☐ Tank/Lines comply with NFPA 31 ☐ Purged Fuel Lines
General:	☐ Boiler elevated off basement floor. Note: If not in basement, can be on floor if approved PMI. ☐ Check clearances of heating unit and vent connector to nearby combustibles (Gas IFGC; Oil NFPA 31) ☐ Combustion air and exhaust piping properly installed, terminated and supported ☐ Installed Pressure Relief Valve PMI ☐ Test holes sealed ☐ Barometric controls operate properly PMI (if applicable) ☐ Permit Required ☐ Bled air from entire system ☐ Distribution Flushed PMI ☐ Condensate properly drained per code and PMI ☐ Distribution Water Treated PMI ☐ Orphaned water heater has proper draft (see p. 2)

Existing Load Terminals and Capacity:
Radiation Type: ☐ Fin Tube ☐ Radiator ☐ Baseboard ☐ Other: _____
Linear Feet: _____ (Fin Tube or Cast Iron Baseboard) Square Feet: _____ (Radiators)

Measured BTUs of New Boiler:
Modulating Boiler Turndown Ratio (if applicable): _____ :
Rated BTUs (input): _____ Measured Btu Input (2 cu. ft. of gas): _____ Minutes: _____ Seconds: _____
Nozzle GPH: _____ Nozzle Angle: _____ ° Nozzle Spray Type: _____

Measured Gas Pressure in Inches of Water Column(IWC) or Oil PSI:
Input: _____ Manifold (High): _____ Manifold (Low): _____ Oil (PSI): _____

Installed Devices: Indicate what was installed. Steps must be taken to prevent condensation in non-condensing units.
☐ Air Excluding Device ☐ Mixing Valves ☐ Automatic Fill Valve ☐ Backflow Preventer ☐ Other: _____
☐ Wye Strainer ☐ Outdoor Sensor (install on North wall) ☐ Circulator Pump HP _____ GPM _____ W _____
Size Speed Setting Watts

PERFORMANCE TESTING

Combustion and Draft Testing
Adjust to achieve typical ranges for applicable appliance (see page 2)

	☐CO_2 ☐O_2	CO PPM	Draft	Intake Air °F	Flue Temp °F	SSE %	AFUE %
High Input							
High Input PMI							
Low Input							
Low Input PMI							
Oil Boilers Only:		Overfire Draft:			Smoke Test #:		

Outdoor Reset Setup	Warm Weather Shut Down		Design Temp
Outdoor Temp °F			
Boiler Supply °F			
Measured Temps °F	Supply	Return	Outdoor
Primary Loop (High Input)			

I certify the visual inspection and performance tests were completed as indicated.

I certify the heating system was installed to my satisfaction on the date indicated.

Installer Signature _____ Date _____ Customer Signature _____ Date _____

Replacement Boiler Specifications (Natural Gas, Propane (LP) and Fuel Oil)

Generally accepted ranges, excerpted from the Weatherization Field Guide. Always follow manufacturer's instructions if they differ from listed typical specifications. Examples of temperature rise testing procedures below.

Typical Ranges for Gas Burning Appliances

Acceptable Draft Test Readings for Gas Appliances with Respect to Outdoor			
	<10° F.	**10°-90° F.**	**>90° F.**
Draft (Pa)	-2.5	(°F Out / 40) - 2.75	-0.5
Draft (IWC)	-.010	(°F Out / 10,000) - 0.011	-.002

Gas: Measure draft halfway between collar and chimney.

Performance Indicator	**SSE 80+**	**SSE 95+**
Carbon monoxide (CO) ppm as-measured	≤ 100	≤ 100 or PMI
Stack temperature °F	325°- 450°	90°- 120°
Oxygen (O_2%)	4 - 9%	4 - 9%
Natural gas pressure output at manifold - Inches of Water Column (IWC)	3.2 - 3.9 IWC	3.2 - 3.9 IWC
Propane pressure output at manifold (IWC)	10 - 11 IWC	10 – 11 IWC
Steady-State Efficiency (SSE)	82 - 84%	95 - 97%
Supply temperature °F	120° - 140°	95° - 140°
Return Water Temperature-Non-condensing °F	> 120	N/A

Typical Ranges for Oil Burning Appliances

Performance Indicator	**Flame Retention**
Carbon Monoxide (CO) ppm as-measured	≤ 100
Stack Temperature °F	300°- 450°
Oxygen (O_2) %	5 - 9%
Smoke Number (0-9)	< 1
Oil Pressure Pounds per Square Inch (psi)	PMI or 100 – 150
Over-fire Draft (Inches of Water Column (IWC))	-0.02 IWC or -5 Pa
Flue Draft (IWC)	-0.04 to -0.06 IWC or -10 to -15 Pa
Steady State Efficiency (SSE)	≥ 80%
Return Water Temp (Non-condensing boiler) °F	> 120

Oil: Measure draft between barometric damper and collar and at over fire.

Comments:

Wisconsin Weatherization
Repair or Clean and Tune Checklist

Customer: _____ Contractor: _____

Work Date: _____ Serial #: _____

WisWAP BID: _____ **OR** WHEAP App#: _____

Fuel Type: ☐ Natural Gas ☐ Propane ☐ Oil ☐ Other: _____

System Type: ☐ Forced Air ☐ Boiler ☐ Space Heater ☐ Other: _____

Clean, inspect, test, and repair: Perform the following inspection procedures and maintenance practices on heating systems as necessary. The goal of these measures is to reduce carbon monoxide (CO), adjust fuel-air mixture, improve steady-state efficiency and verify the operation of safety controls. All drilled holes should be properly sealed after completion of testing.

Check box, enter test results or requested number as item is inspected or completed.

ALL SYSTEMS	Emergency shut off	☐	Service disconnect is present and is operational
	Electrical service	☐	Inspect circuit; Rated for application; Note problems & make recommendations
	Fuel lines/storage tanks	☐	No leaks present; Shut off present; Filter or sediment trap is present and clean
	Blower	☐	Clean
	Air Handler	☐	Clean
	Air Filter	☐	Clean or replace
	Heat Exchanger	☐	Clean surface & inspect for leaks; Inform customer & agency if exchanger is cracked
	Filter Slot/Filters	☐	Filter slot with cover is present; Replacement filters/permanent filter present
	Thermostat	☐	Set heat anticipator to amperage measured in control circuit or PMI
OIL HEATING UNIT	Oil Filter	☐	Replace filter
	Nozzle	☐	Replace nozzle Nozzle GHP: _____ Nozzle Angle: _____ ° Spray Type: _____
	Electrodes	☐	Adjust gap and position in burner tube PMI
	Transformer	☐	Clean contacts; Measure voltage & replace if voltage is not within PMI
	Burner/Burner Tube Assembly	☐	Clean; Inspect for over burning; Replace flame retention head if damaged
	Combustion Chamber	☐	Clean; If necessary repair combustion chamber or replace
	CAD/Stack Control Cell	☐	Test; Verify that burner shut off, PMI, when the cad cell is blocked from flame
	Flame Ignition	☐	Test; Ignition must be instantaneous; Pre-purge type unit, blower on prior to ignition
	Barometric Damper	☐	Plumb, level, swings freely
	Flue Draft (before damper)	☐	Measure and adjust as needed (see page 2)
	Over Fire Draft	☐	Measure and adjust as needed (see page 2)
	High Limit Control	☐	Measure shut off temperature & adjust or replace if >250° (furnace) or >180° (boiler)
	Oil Pump Pressure	☐	Measure and adjust to PMI; Measured Pressure: _____ PSI
NG/LP	Burners	☐	Check for dust, debris, misalignment, flame impingement & other flame-interference problems; Clean, vacuum and adjust as needed
	Burner/Manifold	☐	No soot, melted wire insulation or rust in burner and manifold area outside of firebox
	Pilot (if equipped)	☐	Burning, good ignition, check safety control for gas valve shut-off when pilot is out
	Gas Pressure (IWC)	☐	Input: _____ Manifold: _____

PERFORMANCE TESTING

Input on Label:		**Output on Label:**		**Measured Input: (Clock Meter)**	

Steady State Efficiency Test

Adjust to Achieve Typical Ranges for Gas Burning Appliances (see page 2)

SSE %	O2%	CO PPM	Smoke #	Flue °F

Distribution Static Pressure

☐ IWC or ☐ Pa

Return	Supply	Air Flow	Total Pressure

Temperature Rise

Supply °F	Return °F	Total Rise

PMI Range

Minimum	Maximum

I certify the visual inspection and performance tests were completed as indicated.

Installer Signature: _____

Printed Name: _____

Date: _____

I certify the heating system was installed to my satisfaction on the date indicated.

Customer Signature: _____

Printed Name: _____

Date: _____

Building/Client/Audit Information

Version 8.4.2020

HEPLUS ID			
Agency		**Audit Date**	
Auditor		**Conditioned Stories**	
Type	**Single Family**	**Floor Area**	
Year Built			
Ownership			
Address		**Contact Name**	
City		**Occupants**	
Zip Code		**Contact Number**	
County		**Primary Language**	
		Attached Garage	

Comments/Notes

WALLS

Wall Code	Wall Type	Stud Size	Exterior Type	Exposed To	Orientation	Wall Height	Wall Length	Area	Existing Insulation	R-Value
WL1										
WL2										
WL3										
WL4										

Comments/Notes (includes wall prep, materials, and H&S issues to address)

WINDOWS

Window Code	Window Type	Frame Type	Glazing Type	Interior Shading	Exterior Shading %	Leakiness	Width	Height	Wall Code	Number	Wall Code	Number	Wall Code	Number	Wall Code	Number
WD1					20	Medium										
WD2					20	Medium										
WD3					20	Medium										
WD4					20	Medium										

Comments/Notes (includes framing repairs, glass replacement, sash replacements, window replacements, and H&S issues to address)

DOORS

Door Code	Door Type	Storm Door Condition	Leakiness	Add W/S?	Width	Height	Area	Wall Code	Number	Wall Code	Number	Wall Code	Number
DR1						80							

Comments/Notes (includes framing repairs, latch/lockset repairs, door replacements,and H&S issues to address)

UNFINISHED ATTICS

Attic Code	A1		**Existing Insulation**		**Depth (avg)**		**#**
Attic Type	Unfloored					**Open Junction Box**	
Joist Spacing	16					**Splice Not In Junction Box**	
Dimensions		X				**Non IC Can Light**	
Area						**IC Can Light**	
Roof Color			**Access Type**			**Unvented Exhaust Fan**	
Live Knob & Tube Wiring				Dimensions	X	**Vented Exhaust Fan**	

Comments/Notes (includes attic prep, materials, and H&S issues to address)

Box Masonry Chimney	
Box Metal Vent	

FINISHED ATTICS

				Depth (avg)		#
Attic Code	FA1		**Existing Insulation**			**Open Junction Box**	
Attic Area Type	Roof rafter		**<<Rafter Depth**			**Splice Not In Junction Box**	

Dimensions		X		inches
Area				
Roof Color				
Live Knob & Tube Wiring				

Comments/Notes (includes attic prep, materials, and H&S issues to address)

				Depth (avg)		#
Attic Code	FA2		**Existing Insulation**			**Open Junction Box**	
Attic Area Type	Collar beam					**Splice Not In Junction Box**	
Attic Floor Type	Unfloored					**Non IC Can Light**	
Dimensions		X				**IC Can Light**	
Area						**Unvented Exhaust Fan**	
Roof Color			**Access Type**			**Vented Exhaust Fan**	
Live Knob & Tube Wiring							

Comments/Notes (includes attic prep, materials, and H&S issues to address)

Box Masonry Chimney	
Box Metal Vent	

FOUNDATIONS

Foundation Code	F1			**Foundation Space**	
Dimensions		X		**Foundation Type**	

FLOOR

Area		**Existing R Value**	0

SILL

Floor Joist Size		**Total Length Not Insulated (Perimeter to Insulate)**		feet

FOUNDATION WALL

Perimeter		**Existing R Value**	0				
Exposed Exterior Height		inches	**Interior Height**		feet	**% Height Exposed**	

Comments/Notes (includes foundation prep, materials, and H&S issues to address)

HEATING SYSTEMS

PRIMARY

Manufacturer			
Model number			
Equipment Type			
Fuel/Heat Supplied			
Location/Condition			
Input/Size/SSE	kBTU		
CO/O2/Excess Air			
Thermostat			

Temp Rise/Supply/Return	0		
Air Flow/Filter Cover/Drop			
Filter Size			1

Zones/Pumps/Zone Valves			
Fill/Backflow/Tank			
Other Notes			

Comments/Notes

Secondary

Manufacturer			
Model number			
Equipment Type			
Fuel/Heat Supplied			
Location/Condition			
Input/Size/SSE	kBTU		
CO/O2/Excess Air			
Thermostat			

Temp Rise/Supply/Return	0		

WATER HEATERS

Manufacturer		
Model number		
Equipment Type		
Fuel/Size		
Location/Condition		
Leaks/Temperature		

Comments/Notes

AIR CONDITIONING

PRIMARY

Manufacturer		
Model Number		
Serial Number		
Type		
Size (Tons)/Area Cooled		

	SEER	**EER**	**COP**
Efficiency			

Secondary

Manufacturer		
Model Number		
Serial Number		
Type		
Size (Tons)/Area Cooled		

	SEER	**EER**	**COP**
Efficiency			

Thirdary

Manufacturer	
Model Number	
Serial Number	

Air Flow/Filter Cover/Drop			
Filter Size			1

Thirdary

Manufacturer			
Model number			
Equipment Type			
Fuel/Heat Supplied			
Location/Condition			
Input/Size/SSE	kBTU		
CO/O2/Excess Air			
Thermostat			

Temp Rise/Supply/Return	0		
Air Flow/Filter Cover/Drop			
Filter Size			1

Fourthary

Manufacturer			
Model number			
Equipment Type			
Fuel/Heat Supplied			
Location/Condition			
Input/Size/SSE	kBTU		
CO/O2/Excess Air			
Thermostat			

Temp Rise/Supply/Return	0		
Air Flow/Filter Cover/Drop			
Filter Size			1

Type		
Size (Tons)/Area Cooled		

	SEER	**EER**	**COP**
Efficiency			

Fourthary

Manufacturer		
Model Number		
Serial Number		
Type		
Size (Tons)/Area Cooled		

	SEER	**EER**	**COP**
Efficiency			

REFRIGERATORS

PRIMARY

Manufacturer			
Model number			
Style			
Seal Condition			
Size/Swing			
Year/Owned			
Dimensions H-W-D			

Comments/Notes

Secondary

Manufacturer			
Model number			
Remove/Bounty/Replace			
Style			
Seal Condition			
Size/Swing			
Year/Owned			
Dimensions H-W-D			

Thirdary

Manufacturer			
Model number			
Remove/Bounty/Replace			
Style			
Seal Condition			
Size/Swing			
Year/Owned			
Dimensions H-W-D			

FREEZERS

PRIMARY

Manufacturer			
Model number			
Style			
Seal Condition			
Size/Swing			
Year/Owned			
Dimensions H-W-D			

Comments/Notes

Secondary

Manufacturer			
Model number			
Remove/Bounty/Replace			
Style			
Seal Condition			
Size/Swing			
Year/Owned			
Dimensions H-W-D			

Thirdary

Manufacturer			
Model number			
Remove/Bounty/Replace			
Style			
Seal Condition			
Size/Swing			
Year/Owned			
Dimensions H-W-D			

HEALTH & SAFETY REPAIRS

DRYER	
Venting	
Length	

Gas Leaks	
Location 1	
Location 2	
Location 3	
Location 4	

Alarms	**CO**	**Smoke**	**Combo**
Basement			
1st Floor			
2nd Floor			
3rd Floor			

Health & Safety Issues

Moisture	
Electrical	
Indoor Air Quality	
Other	

Repairs Needed

Structural	
Electrical	
Plumbing	
Other	

Comments/Notes

LIGHTING WATER

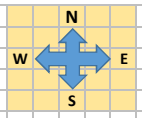
Replace Bulbs	**Size**	**#**	**Lamp**
Living Room			

Hot Water Savings	**# Needed**
Kitchen Aerator	
Bathroom Aerator	
Showerhead	
Hand Held Showerhead	
Lower Temperature	

Comments/Notes

BUILDING FOOTPRINT/GRAPH

Conditioned Stories
Floor Area



Attachment 10 - Final Inspection & Energy Audit Services
RFB # 05-1421 - Mandatory Photos for Pre-Inspections

Outside of building

1) Address of building
2) All sides of building.
3) For sale signs on property
4) Roof condition, cupped /curled /lifted /missing /damaged shingles
5) Dryer vent penetrations
6) Exhaust fan penetrations
7) Roof vents/gable end vents/ridge vents
8) Chimney, and clay liner at top if possible
9) Gutters, unconnected/ missing downspouts
10) Any missing or damaged siding
11) Any grading sloping toward house, or any moisture producing issues
12) Roof penetrations, vents, skylights, light tubes
13) Fireplace exterior, especially flues at top

Inside of building

14) Refrigerator/s, tag w/ model and serial number
15) Freezer/s, tag w/ model and serial number
16) Full room photos of kitchens and bathrooms
17) Kitchen fan and range hood
18) Bathroom fans
19) Roaches, vermin, rats, mice, birds etc.
20) General condition of home, cleanliness, piles of clothes, storage items etc.
21) Condition of walls and ceilings, broken drywall, missing plaster, peeling paint
22) Broken windows, frames if rotted
23) Dropped ceilings and above tile
24) Any items verifying reasons for deferral

Basement

25) Full photo of water heater
26) Water heater venting w/ chimney penetration
27) Water heater tag with model/serial numbers
28) Full photo of furnace
29) Furnace venting w/ chimney penetration
30) Furnace tag with model/serial numbers
31) Mold if present
32) Standing water if present
33) Unsanitary conditions
34) Electrical panel open and closed
35) Any open electrical hazards
36) Knob and tube wiring
37) Plumbing leaks

Attic

38) All attic accesses, horizontal, vertical, kneewall
39) Attic insulation levels
40) Fan penetrations and vent ducts in attic
41) Any force air heating system supply or returns in attic
42) Attic roof deck, stains, mold, evidence of leaks
43) Roof vents if plugged from nest material
44) Knob and tube wiring
45) Full photo of attic area

Attachment 11 - Final Inspection & Energy Audit Services
RFB # 05-1421 - Mandatory Photos for Energy Audits & Final Inspections

Outside of building

1) Address of building
2) All sides of building.
3) For sale signs on property
4) Roof condition, cupped /curled /lifted /missing /damaged shingles
5) Cantilevered frame floors, picture of bottom
6) Dryer vent penetrations
7) Exhaust fan penetrations
8) Roof vents/gable end vents/ridge vents
9) Chimney, and clay liner at top if possible
10) Gutters, unconnected/ missing downspouts
11) Any missing or damaged siding
12) Any grading sloping toward house, or any moisture producing issues
13) Roof penetrations, vents, skylights, light tubes
14) Fireplace exterior, especially flues at top

Inside of building

15) Thermostat/s
16) Refrigerator/s, tag w/ model and serial number
17) Damaged/missing refrigerator seals
18) Frost forming on exterior of appliances
19) Stove top with burners or electric unit
20) Oven if separate unit from stove
21) Freezer/s, tag w/ model and serial number
22) Full room photos of kitchens and bathrooms
23) Kitchen fan and range hood, ducting if vented to exterior
24) Bathroom fans
25) Kitchen aerator
26) Bathroom aerators
27) Shower heads
28) Roaches, vermin, rats, mice, birds etc.
29) General condition of home, cleanliness, piles of clothes, storage items etc.
30) Condition of walls and ceilings, broken drywall, missing plaster, peeling paint
31) Broken windows, frames if rotted
32) Recessed lights
33) Drop soffits
34) Sloped ceilings
35) Kneewalls
36) Dormers
37) Dropped ceilings and above tile
38) Any items verifying reasons for deferral

Basement

39) Full photo of water heater
40) Water heater venting w/ chimney penetration
41) Water heater tag with model/serial numbers
42) Water heater PRV pipe or valve if pipe missing
43) Water heater flame roll out if present
44) Any tank damage or leaks
45) Full photo of furnace
46) Furnace venting w/ chimney penetration
47) Furnace tag with model/serial numbers
48) Furnace filter rack and cover if present
49) Inside of blower compartment and fan
50) Duct work needing replacement, not attached
51) Supply vents in plenum or basement supplies
52) Return vents in return drop or basement
53) Supply and return duct or panning needing sealing, mastic, or repair
54) Pipe wrap on pipe loop between boiler and side arm water heater
55) Existing/removed oil tank or permanent seal of filler
56) Sill boxes, include top of foundation wall
57) Dryer venting or lack of, gas /electric to dryer
58) Mold if present
59) Standing water if present
60) Unsanitary conditions
61) Floor drain in relation to furnace
62) Laundry tray/basement sink trap
63) Electrical panel open and closed
64) Any open electrical hazards
65) Existing CSST
66) Knob and tube wiring
67) Gas leaks flagged w/ surveyors tape
68) Plumbing leaks
69) Major bypasses in basement
70) Chimney clean out

Attic

71) All attic accesses, horizontal, vertical, kneewall
72) Attic insulation levels
73) Fan penetrations and vent ducts in attic
74) Any supply or returns in attic
75) Attic roof deck, stains, mold, evidence of leaks
76) Knob and tube wiring
77) Roof vents if plugged from nest material
78) Knee wall insulation level
79) Closed floor and insulation level if possible
80) Sloped, cathedral ceiling insulation levels
81) Built in drawer or shelve units into attic
82) All penetrations from heated living space

Testing

83) Blower door set up w/ cfm number
84) SSE, CO, O, stack temp and draft testing numbers on combustion appliances
85) Exhaust rate testing of exhaust fans

Customer Bill of Rights

Weatherization services help homeowners and renters reduce energy consumption while increasing comfort in their homes by helping keep them cooler in summer and warmer in the winter. Addressing weatherization problems can make home environments healthier and safer. The services provided by the weatherization agency are guaranteed based on federal consumer protection laws.

The right to safety:

- Consumers have a right to be protected from unsafe products.
- In 1972, the Consumers Products Safety Commission was created by Congress to "protect the public from unreasonable risks of injury from consumer products."
- You have the right to request Safety Data Sheets (SDS) from the agency or installer.
- Customers of the program have the right to ask if someone seeking entrance to their home is carrying a concealed firearm or other weapon, and the right to refuse entry to an individual carrying a weapon.

The right to be informed:

- This has been interpreted to mean that consumers have the right to know exactly what they are buying, the terms of the sale and guarantees, and the risks that might accompany the use of a product.
- There is no cost to income-eligible customers for the weatherization services provided.
- Consumers will be provided a detailed work agreement prior to any weatherization measures being installed.
- When applicable, owners of rental property will be informed of the estimated cost of weatherization and the portion they are responsible for. The owner of the rental property must make full payment for the estimated cost prior to commencement of weatherization work. When all work is completed, the cost to the owner will be recalculated based on actual costs. Underpayment must be made by the owner to the weatherization agency; overpayment will be reimbursed to the rental property owner.

Warranty Information

All non-appliance weatherization work will be guaranteed by the weatherization agency or their contractor for a period of one year from the date of final inspection. Appliances, including but not limited to water heaters, furnaces, refrigerators, and freezers will be guaranteed for one year from the date of installation. Manufacturer warranties that extend beyond one year will begin concurrent with the one year warranty. Manufacturer warranty service beyond the one-year limitation must be completed through contact with the manufacturer or the manufacturer authorized dealer or service center. The initial one-year warranty will be serviced through the weatherization agency or designated subcontractor. You should receive contact information from each subcontractor for warranty service. Your weatherization agency, ***<insert agency name>***, can be contacted at: ***<insert agency contact information>*.** For the initial one-year warranty period, if you do not receive satisfactory warranty service from the agency subcontractor, you should contact the weatherization agency. In the event warranty service is not resolved through the weatherization agency, you may contact the Home Energy Plus hotline at: **1-866-HEATWIS**.

Your initial contact regarding inquiries or complaints should be with the weatherization agency at the agency contact information listed above. If your inquiry or complaint is not resolved by the agency, you may call: **1-866-HEATWIS**.

Revised: June 2016

Social Development Commission
Pathways from poverty to success

Release of Liability

Release of Liability and Waiver of Claims

Health and Safety Assessment

In addition to the energy audit we will do on your home, we will also do a limited health and safety assessment of the home. The health and safety assessment will consist of a visual inspection for potential health and safety problems. You will be notified of any health and safety problems that are identified, including mold. However, the evaluator is not a qualified mold professional. Mold may be present in areas not accessible or seen during the visual inspection or during the actual work on your home. Work on your home will be performed in a manner to prevent future mold growth. However, if there are existing conditions that are unseen or if, after the work is completed, situations within your home result in mold growth, we shall not be held responsible or liable.

Weatherization Activities

Notice: During weatherization activities, particularly when insulation is being blown into wall cavities and attics, insulation dust, other types of dust, and other particles may become airborne. Additionally, unforeseen circumstances may result in some insulation leaking through cracks into the home's living space. In those circumstances where insulation leaks into the living space, we will be responsible for clean-up (repairing damage and cleaning up the living area). Minor construction dust is inevitable at the end of any remodeling work. Construction dust clean-up will be the responsibility of the home owner/occupant.

***Recommendation:* It is recommended that people with the following health conditions be out of the house when insulation is being blown into the house: Asthma, emphysema, allergies and other respiratory conditions, pregnancy and any other serious health conditions such as decreased immune functions which might be aggravated by dust and other dust-like particles in the air. Furthermore, it is also recommended that infants less than 12 months old should be out of the house when insulation is being blown. Persons who leave the house during the insulation process should remain outside the house for at least 30 minutes after completion of insulation activities.**

Release and Waiver of Claims: I acknowledge by my signature below receipt of the information and recommendations set out above. Additionally, I agree on behalf of myself and any minor children or others for whom I am responsible, to hold the agency and its agents harmless from any claims, medical problems or personal injuries that may occur, develop or worsen in response to the weatherization activities. This waiver is for all damages, direct or indirect, that may relate to weatherization activities, including money lost by not being able to work, healthcare costs and pain or suffering.

I am aware the weatherization process may cause airborne particles, including dust, to be released in my home and that such airborne particles can aggravate health conditions. I have chosen to go forward with the weatherization process, accepting any and all risks of injury or damages.

I have carefully read this release and waiver and fully understand its contents. I am aware this is a release of liability and have signed it of my own free will.

Client Name: _____ Phone: _____

Address: _____

City, Zip: _____

Client Signature: _____ Date: _____

1730 West North Avenue, Milwaukee, WI 53205 • Phone: 414.906.2700 • Fax: 414.906.2719 • cr-sdc.org

FY22 Health and Safety Checklist

WisWAP BID:	_____	**Unit*:**	_____
Customer Name:	_____		

**In 1 to 4-unit buildings, complete a separate Health & Safety Checklist on each audited unit.*

Existing Health and Safety Hazards *(check yes only if a hazard is identified by the Agency representative)*

☐ *No existing health and safety hazards identified by the weatherization agency (skip to Moisture Audit).*

Yes	Appliances and Mechanical Systems	Description of hazard
☐	Heating System	
☐	Water Heater	
☐	Electrical System	
☐	Plumbing	
☐	Appliances	
☐	Other:	
Yes	**Indoor Air Quality**	**Description of hazard**
☐	Ventilation	
☐	Improperly Stored Chemicals	
☐	Gas Leak	
☐	Oven Carbon Monoxide	
☐	Carbon Monoxide (CO) Alarms	
☐	Smoke Detectors	
☐	Other:	
Yes	**Structural Hazards**	**Description of hazard**
☐	Roof Condition	
☐	Wall Condition	
☐	Foundation Condition	
☐	Floor Condition	
☐	Ceiling Condition	
☐	Interior and Exterior Stairways	
☐	Window and Door Condition	
☐	Other:	
Yes	**Possible Asbestos Containing Material (PACM)**	**Description – Include Locations in Home**
☐	Material sample will be tested	
☐	Evidence of PACM surfaces that may be disturbed	
☐	Evidence of friable PACM that may be disturbed	
Yes	**Possible Lead Paint**	**Description - Include Locations in Home**
☐	Painted surfaces will be tested	
☐	Evidence of possible lead paint surfaces that may be disturbed less than or equal to 6 square feet (SF) per room interior or 20 SF exterior	
☐	Evidence of possible lead paint surfaces that may be disturbed greater than 6 SF per room interior or 20 SF exterior	

FY22 Health and Safety Checklist

Moisture Audit

Existing Conditions *(check yes only if a hazard is identified by the Agency representative)*

☐ ***No moisture issues, standing water, or mold growth identified by the weatherization agency (skip to page 3).***

Yes	Indoor Air Quality - Moisture	Description
☐	Moisture Issues	
☐	Standing Water	
☐	Mold Growth	

Moisture Areas:

Yes	Existing Conditions *(check all that apply)*
☐	Damp atmosphere in house
☐	Client complaint of allergy-like symptoms
☐	Visible mold growth *(if checked, complete the Mold Areas checklist below)*
☐	Evidence of water penetrating the home *(stains, moist areas)*
☐	Evidence of conditions that might allow water in the home *(poor grading, bad flashing, bad/missing gutters)*
☐	Construction defect or deterioration that allows water into the home *(roof, decks, windows, concrete slabs, lack of vapor barrier)*
☐	Plumbing defects *(leaking drains, pipes or toilets, missing caulk on sinks or tubs; soil pipe venting)*
☐	HVAC problems *(dirty/moist filters, poor condensation drainage)*
☐	Dryer vented indoors and/or inadequate ventilation for a kitchen, bath or other high moisture area
☐	Any source of condensation that accumulates in home.

Mold Areas:

Yes	Existing Conditions *(check all that apply)*	Description	Existing Mold	Area (Square Feet)	Cleanup Required by Customer
☐	Bath		☐		☐
☐	Shower		☐		☐
☐	Kitchen		☐		☐
☐	Laundry area		☐		☐
☐	Basement walls		☐		☐
☐	Crawlspace		☐		☐
☐	Exterior walls		☐		☐
☐	Attic/Ceilings		☐		☐
☐	Other		☐		☐

If an existing mold area is identified above, check one of the following:

☐ Weatherization work cannot be performed until the mold has been addressed in the location where Cleanup Required by Customer column is checked. The customer is responsible for any cleanup. See the Home Energy Plus Deferral Notification for more information.

☐ Any item checked in the Existing Mold column, but not checked in the Cleanup Required column, does not require clean up prior to weatherization work commencing. However, it is advisable to clean up all identified mold areas.

FY22 Health and Safety Checklist

Indoor Air Quality

Mechanical Ventilation

When creating an energy-efficient, airtight home it is important to consider ventilation. Without proper ventilation, an airtight home can seal in indoor air pollutants, such as carbon monoxide. Ventilation also helps control moisture. Controlling moisture can make your home more energy-efficient, less costly to heat and cool, and more comfortable. The Weatherization Assistance Program installs two types of mechanical ventilation: source and continuous ventilation.

Source Ventilation. Source ventilation, also called *local exhaust* or *spot ventilation*, exhausts airborne pollutants and excess moisture from a specific area in your home. Bathroom fans and kitchen fans are common examples of source ventilation. The fan operates when pollutants or excess moisture are in the air, for example, during showers, when cooking or smoking. The fan should operate for 15-20 minutes after showering or cooking, to allow the fan enough time to remove pollutants and excess moisture from your home.

Continuous Ventilation. A continuous-ventilation fan improves your family's comfort and health by continuously exhausting stale indoor air and drawing fresh air into the home. A fan operating continuously regulates the amount of fresh air flowing into your home. This allows weatherization workers to save you more energy by sealing costly air leaks without worrying about making the house "too tight". An Energy Star® exhaust fan operating continuously is inexpensive to operate, typically less than a dollar of electricity per month. The American Society of Heating, Refrigerating, and Air-Conditioning Engineers (ASHRAE) established the standards and specifications for continuous ventilation. Fan settings installed by the Weatherization Assistance Program are based on the ASHRAE 62.2 standard. ASHRAE 62.2 does not account for high polluting sources or guarantee indoor air quality.

More information about home ventilation is available on the U.S. Department of Energy web page at:
http://energy.gov/public-services/homes/home-weatherization/ventilation
http://energy.gov/sites/prod/files/guide_to_home_ventilation.pdf

A computerized audit will be performed by the weatherization agency to determine 1) if your home is eligible for weatherization services and 2) if work is needed to improve the air quality in your home. If weatherization proceeds the building owner will receive a work agreement that will detail any health and safety items such as mechanical ventilation to be installed in your home, if applicable. The ventilation type may change throughout the course of weatherization work depending on the results of additional tests performed after insulation and air sealing work is completed.

Radon and Weatherization

Radon is a naturally occurring radioactive gas that can enter homes through the soil. For general information on radon in Wisconsin visit the Wisconsin Department of Health Services website: https://www.dhs.wisconsin.gov/radon.

According to U.S. Department of Energy studies, some work performed by the weatherization program such as mechanical ventilation and installation of plastic covering on dirt floors may reduce the risk of radon in weatherized homes.

FY22 Health and Safety Checklist

Customer Signature

Based on our initial limited visual assessment of your building, we have noted the potential health or safety issues identified as of the date above. If testing is performed to confirm a potential lead or asbestos hazard identified above and the test result causes the weatherization job to be deferred, the test result will be communicated to the building owner in a Deferral Notification Letter. You may contact the weatherization agency to request a copy of the test results.

Receipt of Additional Health and Safety Documents

By signing below, I acknowledge receipt of the Environmental Protection Agency (EPA) pamphlets entitled *The Lead-Safe Certified Guide to Renovate Right*, *A Brief Guide to Mold, Moisture, and Your Home and A Citizen's Guide to Radon; and,* receipt of Wisconsin Weatherization Assistance Program document entitled *Customer Bill of Rights.*

I reviewed and understand this Health and Safety Checklist and have signed it of my own free will. I have notified the weatherization agency of any occupant health issues that may be affected by weatherization activities. I am aware of the risks associated with indoor air quality hazards. By signing below, I acknowledge being informed of health and safety issues which may have to be addressed prior to any weatherization work being performed.

Occupant Signature: _____ Date: _____

Printed Name: _____

Owner Signature: _____ Date: _____

Printed Name: _____

Agency Representative: _____ Date: _____

Printed Name: _____

☐ A good faith effort was made to obtain an occupant signature, but an occupant was unavailable to sign the Health and Safety Checklist. A copy of the completed checklist was left in the home.

Wisconsin Weatherization Assistance Program
Single Family Owner Occupied Work Agreement

WisWAP Building ID:	[WisWAP BID]	Job #:	[Job #]
OWNER:	[OWNER]		

This Agreement is entered into between [AGENCY], hereafter referred to as the AGENCY, through its Wisconsin Weatherization Assistance Program and the above named OWNER, for weatherization completed at the property located at: [ADDRESS].

By signing this Agreement, the OWNER agrees to allow the AGENCY and/or its subcontractors to perform all of the energy conservation/health and safety measures identified by the AGENCY at the property location listed above.

The AGENCY and the OWNER agree to the following:

INDEMNIFICATION and HOLD HARMLESS

The OWNER shall indemnify and hold harmless the State of Wisconsin, the Division of Energy, Housing and Community Resources (DEHCR), the AGENCY, and all of their respective officers, agents and employees from all suits, actions or claims of any character brought forth or on account of any injuries or damages received by any persons or property resulting from the operations in performing work under the Agreement.

PARTIAL INVALIDITY OF AGREEMENT

Should a court of competent jurisdiction determine that any part, term or provision of this Agreement is invalid, unenforceable, illegal, or in conflict with any law, the validity, legality, and enforceability of the remaining portions shall not be affected or impaired.

A. AGENCY OBLIGATIONS:

1. NO COST: The AGENCY shall provide weatherization services in a professional manner in compliance with the State and Federal Weatherization Assistance Program specifications AT NO COST TO THE OWNER.
2. RESPONSIBILITY: The AGENCY shall develop specifications based on results of a computerized audit detailing work to be performed by the AGENCY. The AGENCY shall assume responsibility for overall construction management.
3. AMENDMENTS OR CHANGES: Following the completion of a computerized energy audit, the AGENCY shall inform the OWNER in writing of any amendments or changes to the weatherization measures to be performed/installed as identified in Attachment 1. If the OWNER rejects major weatherization measures, the project may not proceed. Major weatherization measures may include but are not limited to: air sealing; insulation; and replacement of appliances such as a furnace or refrigerator.
4. WARRANTY: The AGENCY shall warrant materials installed and labor performed under this Work Agreement and shall replace, at AGENCY expense, any defective materials installed by the AGENCY. Up to one (1) year from the date of the final inspection, and upon written notice from the OWNER, the AGENCY shall correct any faulty AGENCY workmanship in regard to installed non-appliance weatherization measures. Any manufacturer appliance warranties are effective on the date of installation and are in addition to this stated warranty. This one year warranty provided by the AGENCY shall run concurrent with the first year of any manufacturer's warranty; it does not in any way extend the period of the manufacturer's warranty.

5. INSURANCE: The AGENCY shall maintain contractor's liability insurance coverage for its staff and its subcontractors.
6. LIEN WAIVERS: The OWNER receiving weatherization services has no obligation to pay for weatherization services. The AGENCY, its subcontractors and suppliers are prohibited from taking any collection action for payment from the OWNER for work performed under this Agreement.
7. RESPONDING TO OWNER: The AGENCY shall respond to any questions or inquiries from the OWNER within five (5) working days.
8. PERMITS/LOCAL INSPECTIONS: The AGENCY shall be responsible for any permits and/or inspections required by local jurisdictions for work under this Agreement.
9. COPIES: Upon request, the AGENCY shall provide copies of all documents associated with this project.
10. TERMINATION: The AGENCY may terminate this Agreement upon written notice to the OWNER if any of the following conditions occur during the term of the Agreement:
    a) Weatherization Assistance Program funds are unavailable.
    b) Weatherization materials become unavailable.
    c) Weatherization work is stopped by the act or neglect of the OWNER for more than ten (10) days.
    d) Weatherization work is stopped for more than thirty (30) days by anyone or any reason through no fault of the AGENCY.
    e) The OWNER, Authorized Agent or Applicant commits fraud in relation to the work being performed under this Work Agreement. In the event this Agreement is terminated before completion of the weatherization measures, the AGENCY shall have no further responsibility hereunder. Notwithstanding the forgoing, the AGENCY shall ensure that the property is left in at least as good a condition as at the commencement of the work.
11. RECYCLING APPLIANCES. All appliances removed or replaced under this Agreement, including but not limited to furnaces, thermostats, water heaters, refrigerators and freezers, shall become the property of the AGENCY for recycling and proper disposal.

B. OWNER OBLIGATIONS:

1. MAINTAIN: The OWNER shall safeguard and maintain installed improvements as necessary (example: maintaining furnace) and acknowledges that failure to do so may VOID THE WARRANTY for labor and installed measures.
2. CALLED-FOR MEASURES: The OWNER authorizes the AGENCY and/or its subcontractors to perform the weatherization work based on the results of a computerized audit. The OWNER certifies that if he/she declines any major weatherization or health and safety measures <u>after work has been started</u>, the OWNER shall repay the AGENCY the actual costs of the project. Major weatherization measures may include but are not limited to: air sealing; insulation; and replacement of appliances such as a furnace or refrigerator.
3. CHANGES: The OWNER acknowledges that weatherization work may be altered or deleted if required by structural, health and safety, or mechanical limitations.
4. COOPERATION:
    a) The OWNER shall cooperate with the AGENCY and its subcontractors to facilitate the performance of the work including the removal/relocation of stored property or furnishings.
    b) The OWNER shall restrain pets and ensure that children are not present in the construction area for the period that construction takes place.
5. USE OF EXISTING UTILITIES: The OWNER shall permit the AGENCY and its subcontractors to use, at no cost, existing utilities such as light, heat, electricity, and water as needed to complete the weatherization work.

6. ACCESS TO SANITARY FACILITIES: The OWNER shall allow reasonable access to AGENCY staff and/or subcontractors to sanitary facilities.
7. RIGHT TO INSPECT: The OWNER shall provide the Division of Energy, Housing and Community Resources, the AGENCY, and its assignees access to enter and inspect any in-progress or completed unit during performance of the work or anytime within one year of completion of said work. The OWNER shall be responsible for access in all areas of the structure.
8. ALLERGIES or HEALTH SENSITIVITIES: The OWNER shall inform the AGENCY of any allergies or health sensitivities to any building materials prior to initiation of this agreement.
9. The OWNER shall be responsible to the AGENCY for the total project cost incurred if the Owner's actions (including any remodeling that interferes with weatherization) or inactions cause the work to stop for ten (10) days or longer, resulting in termination.
10. The OWNER understands that the AGENCY does not service air conditioners and is not liable for future maintenance and/or operation of air conditioning units.
11. The OWNER, by signing this agreement, confirms that this property is not currently for sale, in foreclosure, or in the process of being transferred.
12. TERMINATION OF AGREEMENT: Prior to commencement of any work, the OWNER may terminate this Agreement upon fifteen (15) days written notice to the AGENCY.

RECEIPT OF MATERIALS:

By checking the following boxes I acknowledge receipt of EPA pamphlets entitled:

☐ ***The Lead-Safe Certified Guide to Renovate Right***
☐ ***A Brief Guide to Mold, Moisture, and Your Home***
☐ ***A Citizen's Guide to Radon***

AND Wisconsin Weatherization Assistance Program documents entitled:

☐ ***Customer Bill of Rights***
☐ ***Ventilation and Your Home*** *(if applicable)*

I, the undersigned, certify that I am the Owner/Authorized Agent for the property identified herein and acknowledge that I have read and agree to the terms of this Agreement, including any attachments. This Agreement may be amended only in writing, and only when signed by the OWNER and AGENCY. The undersigned OWNER/AUTHORIZED AGENT acknowledges receiving a copy of this Agreement including any attachments.

_____
(OWNER/AUTHORIZED AGENT) (Date)

_____
(Authorized Representative of AGENCY) (Date)

COMPLETION CERTIFICATE FOR WEATHERIZATION PROGRAM WORK			
WisWAP Building ID:	[WisWAP BID]	Job #:	[Job #]
OWNER:	[OWNER]		

FINAL INSPECTION CERTIFICATION: The final inspection follows the completion of all on-site work. If any additional work is required, the additional work must be completed and will require re-inspection. All crew and contractor work shall be completed before the OWNER signs off regarding satisfactory completion of work.

Post-work inspection date:_____

Call back of contractor or crew required? ☐ YES ☐ NO

If YES, provide reason(s)_____

_____

I, _____, AGENCY representative, certify that all completed work meets the minimum specifications required by the Wisconsin Weatherization Assistance Program.

_____

(FINAL INSPECTOR) (Date)

☐ DOE Unit If DOE Unit, provide BPI HEP QCI ID #: _____

OWNER/AUTHORIZED AGENT SIGN-OFF:

I, [OWNER], the OWNER or OWNER'S authorized agent for [ADDRESS], agree that the weatherization work was completed as agreed in an acceptable manner. By signing below I acknowledge receipt of maintenance and warranty information for all installed materials and appliances.

_____

(OWNER/AUTHORIZED AGENT) (Date)

For AGENCY use only:

☐ Access to unit denied for final inspection

If access to unit is denied, document the date access was attempted and method used.

1st Date:	☐Telephone	☐E-mail	☐US Mail	☐Site Visit	☐Other
2nd Date:	☐Telephone	☐E-mail	☐US Mail	☐Site Visit	☐Other
3rd Date:	☐Telephone	☐E-mail	☐US Mail	☐Site Visit	☐Other

Comments:

Attachment 1 to Work Agreement for [OWNER] (OWNER)

WisWAP Building ID # [WisWAP BID]

The information in this Attachment is not a guarantee of work to be performed. These are preliminary findings and actual work performed may vary depending on the results of a computerized energy audit and/or for reasons described in this Work Agreement.

PROPOSED MEASURES (SUBJECT TO CHANGE BASED ON COMPUTERIZED AUDIT)

AIR SEALING & TESTING		BUILDING SHELL MEASURES	
☐	Perform pre- and post-blower door analysis and Combustion Safety Testing	☐	Insulate attic(s)
☐	Air sealing – Reduce air infiltration	☐	Install attic access
MECHANICAL SYSTEMS		☐	Insulate Sillbox
☐	Replace Heating System	☐	Insulate Exterior Walls
☐	Clean & Tune, and/or repair heating system as needed	☐	Insulate attic walls and/or slopes
☐	Replace Thermostat ☐Programmable ☐Non Programmable	☐	Insulate foundation walls ☐Interior ☐Exterior
☐	Modify Distribution System as needed	☐	Insulate floor cavity of ☐Crawlspace ☐Other
☐	Insulate Distribution Work in unheated areas	☐	_____
☐	Replace Water Heater based on protocol	**BASELOAD MEASURES**	
☐	_____	☐	Reduce water heater temperature to 120 degrees or less
HEALTH, SAFETY & REPAIRS		☐	Install Low Flow Showerhead(s)
☐	Repair or replace wiring to allow for shell insulation	☐	Install Faucet Aerator(s)
☐	Install carbon monoxide detector(s)	☐	Install CFL/LED Lighting
☐	Install smoke detector(s)	☐	Exchange refrigerator with _____Cubic Foot refrigerator
☐	Vent/Re-vent clothes dryer with metal venting material	☐	Exchange Freezer with _____Cubic Foot chest freezer
☐	Install Ventilation Equipment	☐	Remove additional Functional Units ☐ Refrigerator ☐ Freezer
☐	Extend Exhaust Fans to Exterior		

OTHER HEALTH & SAFETY, REPAIR MEASURES or NOTES	
☐	_____
☐	_____
☐	_____
☐	_____

Wisconsin Weatherization Assistance Program – Rental Work Agreement

WisWAP Building ID:	[WisWAP BID]	Job #:	[Job #]
OWNER:	[OWNER]		

This Agreement is entered into between [AGENCY], hereafter referred to as the AGENCY, through its Wisconsin Weatherization Assistance Program and the above named OWNER, for weatherization completed at the property located at: [ADDRESS].

By signing this Agreement, the OWNER agrees to allow the AGENCY and/or its subcontractors to perform **all** of the energy conservation/health and safety measures identified by the AGENCY at the property location listed above.

The AGENCY and the OWNER agree to the following:

INDEMNIFICATION and HOLD HARMLESS

The OWNER shall indemnify and hold harmless the State of Wisconsin, the Division of Energy, Housing and Community Resources (DEHCR), the AGENCY, and all of their respective officers, agents and employees from all suits, actions or claims of any character brought forth or on account of any injuries or damages received by any persons or property resulting from the operations in performing work under the Agreement.

PARTIAL INVALIDITY OF AGREEMENT

Should a court of competent jurisdiction determine that any part, term or provision of this Agreement is invalid, unenforceable, illegal, or in conflict with any law, the validity, legality, and enforceability of the remaining portions shall not be affected or impaired.

A. AGENCY OBLIGATIONS:

1. NO COST: The AGENCY shall provide such services in a professional manner in compliance with the State and Federal Weatherization Assistance Program specifications AT NO COST TO THE TENANT(S). An OWNER contribution may be required as identified in item 11 of Section B. herein. There shall be NO COST to the OWNER in the event the OWNER is eligible under the low income guidelines.
2. RESPONSIBILITY: The AGENCY shall develop specifications based on results of a computerized audit detailing work to be performed by the AGENCY. The AGENCY is responsible for overall construction management.
3. AMENDMENTS OR CHANGES: Following the completion of a computerized energy audit, the AGENCY shall inform the OWNER in writing of any amendments or changes to the weatherization measures to be performed/installed as identified in Attachment 1. If the OWNER rejects major weatherization measures, the project may not proceed. Major weatherization measures may include but are not limited to: air sealing; insulation; replacement of appliances such as a furnace or refrigerator.
4. WARRANTY: The AGENCY shall warrant materials installed and labor performed under this Work Agreement, and shall replace, at AGENCY expense, any defective materials installed by the AGENCY. Up to one (1) year from the date of the final inspection, and upon written notice from the OWNER, the AGENCY shall correct any faulty AGENCY workmanship in regard to installed non-appliance weatherization measures. Any manufacturer appliance warranties are effective on the date of installation and are in addition to this stated warranty. This one year warranty provided by the AGENCY shall run concurrent with the first year of any manufacturer's warranty; it does not in any way extend the period of any manufacturer's warranty.
5. INSURANCE: The AGENCY shall maintain contractor's liability insurance coverage for its staff and its subcontractors.

6. LIEN WAIVERS: The AGENCY shall require its subcontractors and suppliers to seek payment for weatherization services only from the AGENCY. Subcontractors and suppliers are prohibited from taking any collection action for payment from the OWNER for work performed under this Agreement.
7. RESPONDING TO OWNER: The AGENCY shall respond to any questions or inquiries from the OWNER within five (5) working days.
8. PERMITS/LOCAL INSPECTIONS: The AGENCY shall be responsible for any permits and/or inspections required by local jurisdictions for work under this Agreement.
9. COPIES: Upon request, the AGENCY shall provide copies of all documents associated with this project.
10. TENANT NOTIFICATION: The AGENCY shall provide informational brochures to tenants and notify all tenants in writing of the type of work performed, materials installed, owner contributions, and the complaint process in the event of a violation of this Rental Work Agreement.
11. TERMINATION: The AGENCY may terminate this Agreement upon written notice to the OWNER if any of the following conditions occur during the term of the Agreement:
    a) Weatherization Assistance Program funds are unavailable.
    b) Weatherization materials become unavailable.
    c) Weatherization work is stopped by the act or neglect of the OWNER for more than ten (10) days.
    d) Weatherization work is stopped for more than thirty (30) days by anyone or any reason through no fault of the AGENCY.
    e) The OWNER, Authorized Agent or Applicant commits fraud in relation to the work being performed under this Rental Work Agreement. In the event this Agreement is terminated before completion of the weatherization measures, the AGENCY shall have no further responsibility hereunder. Notwithstanding the forgoing, the AGENCY shall ensure that the property is left in at least as good a condition as at the commencement of the work.
12. RECYCLING APPLIANCES. All appliances removed or replaced under this Agreement, including but not limited to furnaces, thermostats, water heaters, refrigerators and freezers, Agreement shall become the property of the AGENCY for recycling and proper disposal.

B. OWNER OBLIGATIONS:

1. MAINTAIN: The OWNER shall safeguard and maintain any installed improvements as necessary (example: maintaining furnace) and acknowledges that failure to do so may VOID THE WARRANTY for labor and installed measures.
2. CALLED-FOR MEASURES : The OWNER authorizes the AGENCY and/or its subcontractors to perform the weatherization measures based on the results of a computerized audit. The OWNER certifies that if he/she declines any major weatherization or health and safety measures <u>after work has been started</u>, the OWNER shall repay the AGENCY the actual costs of the project. Major weatherization measures may include but are not limited to: air sealing; insulation; replacement of appliances such as a furnace or refrigerator.
3. CHANGES: The OWNER acknowledges that weatherization work may be altered or deleted if required by structural, health and safety, or mechanical limitations.
4. COOPERATION:
    a) The OWNER shall cooperate with the AGENCY and its subcontractors to facilitate the performance of the work including the removal/relocation of stored property or furnishings.
    b) The OWNER shall restrain pets and ensure that children are not present in the construction area for the period that construction takes place. The OWNER shall provide written notice to tenants of required access to the building in order for the AGENCY to perform the work. The notice shall state the type of work to be performed and when it is scheduled.

5. USE OF EXISTING UTILITIES: The OWNER shall permit the AGENCY and its subcontractors to use, at no cost, existing utilities such as light, heat, electricity, and water as needed to complete the weatherization work.
6. ACCESS TO SANITARY FACILITIES: The OWNER shall allow reasonable access to AGENCY staff and/or subcontractors to sanitary facilities.
7. RIGHT TO INSPECT: The OWNER shall provide the Division of Energy, Housing, and Community Resources, the AGENCY, and its assignees access to inspect any in-progress or completed unit during performance of the work or at anytime within one year of completion of said work. The OWNER shall be responsible for access in all units and areas of the structure.
8. ALLERGIES or HEALTH SENSITIVITIES: The OWNER shall inform the AGENCY of any occupant allergies or health sensitivities to any building materials prior to initiation of this agreement.
9. The OWNER shall be responsible to the AGENCY for the total project cost incurred if the Owner's, Authorized Agent's, Applicant's and/or tenant's actions (including any remodeling that interferes with weatherization) or inactions cause the work to stop for ten (10) or more days or longer, resulting in termination.
10. The OWNER understands that the AGENCY does not service air conditioners and is not liable for future maintenance and/or operation of air conditioning units.
11. TERMINATION OF AGREEMENT: Prior to commencement of any work, the OWNER may terminate this Agreement upon fifteen (15) days written notice to the AGENCY.
12. OWNER CONTRIBUTION: In rental buildings with two or more units where OWNERS are responsible for paying heating costs, or where units that are master-metered, OWNERS are required to make a contribution to the Agency amounting to a minimum of 15% of the total cost of the weatherization work. OWNERS shall meet the owner contribution requirement with a cash contribution to the Agency.

    Exception: Owners' who are income eligible for weatherization services are not required to make contributions.
13. The OWNER shall not pass on the costs of any contribution listed above through an increase in the rent or other means.
14. The OWNER shall not raise rents for a period of one year from the date of the satisfactory final inspection of work because of the increased value of the dwelling units when the value is increased solely because of the weatherization work.
15. TENANT-OWNED APPLIANCES: Prior to replacement and/or removal of tenant-owned appliances, the OWNER shall resolve all disputes with tenants related to ownership of appliances. When a tenant-owned appliance is removed it becomes the property of the AGENCY, and the new replacement appliance becomes the property of the tenant.
16. The OWNER, by signing this agreement, confirms that this property is not currently for sale, in foreclosure, or in the process of being transferred.

CURRENT MONTHLY RENT: $ _____

REQUIRED CONTRIBUTION FOR THIS PROJECT, (if any): Based on project estimates the amount due prior to commencement of work is: $_____ amounting to __% of total project costs. This amount shall be adjusted to reflect actual project costs upon completion.

RECEIPT OF MATERIALS:

By checking the following boxes I acknowledge receipt of EPA pamphlets entitled:

☐ ***The Lead-Safe Certified Guide to Renovate Right***
☐ ***A Brief Guide to Mold, Moisture, and Your Home***
☐ ***A Citizen's Guide to Radon***

AND The Wisconsin Weatherization Assistance Program:

☐ ***Customer Bill of Rights***
☐ ***Ventilation and Your Home*** *(if applicable)*

I, the undersigned, certify that I am the Owner/Authorized Agent for the property identified herein and acknowledge that I have read and agree to the terms of this Agreement, including any attachments. This Agreement may be amended only in writing, and only when signed by the OWNER and AGENCY. The undersigned OWNER/AUTHORIZED AGENT acknowledges receiving a copy of this Agreement including any attachments.

The final inspection is the last step in the weatherization process and follows the completion of all on-site weatherization work. A sign-off by the Owner or his/her Authorized Agent is required at the conclusion of the final inspection to verify that weatherization work was completed in an acceptable manner. The sign-off may be completed by the building owner, or other authorized agent. Please check **one** of the following:

☐ I, the building owner, will attend the final inspection and sign-off on completed work.

☐ Authorized Agent, _____,will act on my behalf and sign any documents required following completion of weatherization work at the address identified herein.

Authorized Agent Title/Relation:_____

Authorized Agent Phone Number:_____

_____

(OWNER/AUTHORIZED AGENT) (Date)

_____

(Authorized Representative of AGENCY) (Date)

COMPLETION CERTIFICATE FOR WEATHERIZATION PROGRAM WORK			
WisWAP Building ID:	[WisWAP BID]	Job #:	[Job #]
OWNER:	[OWNER]		

FINAL INSPECTION CERTIFICATION: The final inspection follows the completion of all on-site work. If any additional work is required, the additional work must be completed and will require re-inspection. All crew and contractor work shall be completed before the OWNER signs off regarding satisfactory completion of work.

Post-work inspection date: _____

Call back of contractor or crew required? ☐ YES ☐ NO

If YES, provide reason(s)_____

_____

I, _____, AGENCY representative, certify that all completed work meets the minimum specifications required by the Wisconsin Weatherization Assistance Program.

_____

(FINAL INSPECTOR) (Date)

☐ DOE Unit If DOE Unit, provide BPI HEP QCI ID #: _____

OWNER/AUTHORIZED AGENT SIGN-OFF:

I, _____, the OWNER or OWNER'S authorized agent for [ADDRESS], agree that the weatherization work was completed as agreed in an acceptable manner. By signing below I acknowledge receipt of maintenance and warranty information for all installed materials and appliances.

_____

(OWNER/AUTHORIZED AGENT) (Date)

For AGENCY use only:

☐ Access to unit denied for final inspection

If access to unit denied, document the date access was attempted and method used.

1st Date:	☐Telephone	☐E-mail	☐US Mail	☐Site Visit	☐Other
2nd Date:	☐Telephone	☐E-mail	☐US Mail	☐Site Visit	☐Other
3rd Date:	☐Telephone	☐E-mail	☐US Mail	☐Site Visit	☐Other

Comments:

_____

Attachment 1 to Work Agreement for [OWNER] (OWNER)

WisWAP Building ID # [WisWAP BID]

The information in this Attachment is not a guarantee of work to be performed. These are preliminary findings and actual work performed may vary depending on the results of a computerized audit and/or for reasons described in this Work Agreement.

PROPOSED MEASURES (SUBJECT TO CHANGE BASED ON COMPUTERIZED AUDIT)

AIR SEALING & TESTING		BUILDING SHELL MEASURES	
☐	Perform pre- and post-blower door analysis and Combustion Safety Testing	☐	Insulate attic(s)
☐	Air sealing – Reduce air infiltration	☐	Install attic access
MECHANICAL SYSTEMS		☐	Insulate Sillbox
☐	Replace Heating System	☐	Insulate Exterior Walls
☐	Clean & Tune, and/or repair heating system as needed	☐	Insulate attic walls and/or slopes
☐	Replace Thermostat ☐Programmable ☐Non Programmable	☐	Insulate foundation walls ☐Interior ☐Exterior
☐	Modify Distribution System as needed	☐	Insulate floor cavity of ☐Crawlspace ☐Other
☐	Insulate Distribution Work in unheated areas	☐	_____
☐	Replace Water Heater based on protocol	BASELOAD MEASURES	
☐	_____	☐	Reduce water heater temperature to 120 degrees or less
HEALTH, SAFETY & REPAIRS		☐	Install Low Flow Showerhead(s)
☐	Repair or replace wiring to allow for shell insulation	☐	Install Faucet Aerator(s)
☐	Install carbon monoxide detector(s)	☐	Install CFL/LED Lighting
☐	Install smoke detector(s)	☐	Exchange refrigerator with _____Cubic Foot refrigerator
☐	Vent/Re-vent clothes dryer with metal venting material	☐	Exchange Freezer with _____Cubic Foot freezer
☐	Install Ventilation Equipment	☐	Remove additional functional units: ☐Refrigerator ☐Freezer
☐	Extend Exhaust Fans to Exterior		

OTHER HEALTH & SAFETY, REPAIR MEASURES or NOTES	
☐	_____
☐	_____
☐	_____
☐	_____

Social Development Commission
Pathways from poverty to success

Job# _____

Sidewall Insulation Agreement

Address _____

We take every step possible to leave your property in as good a condition as it was prior to the commencement of the work, sidewall insulation is considered "minor construction" and some evidence of disturbance will appear.

The procedure used to insulate the sidewalls is to remove the siding, drill 2 ½" diameter holes high and low in each floor lever and every 16", blow in the insulation and replace the siding.

The following is a list of siding types and situations that may occur:

1. ***Wood*** – Boards may split or chip, paint will chip.
2. ***Aluminum/Vinyl*** – *Minor scratches, handling marks.*
3. ***Asphalt*** – *Tears, holes around nail needs.*
4. ***Slate*** – *Cracked or broken tiles.*

We will, at our option repair or replace any siding damaged by our crews. Repair may be limited to caulking and splits, we will not paint.

During the insulating process there will be hammering and vibrations in the walls, therefore we ask that you remove any items from the walls that may break.

We also ask that you leave your property open for our crews to inspect for any insulation leakage into the living area of the structure.

To acknowledge your understanding of the above listed work, please sign below and check the appropriate box.

__ **I accept** sidewall insulation from exterior or interior.
__ **I accept** sidewall insulation from exterior only.
__ **I accept** sidewall insulation from the interior only.

__ **I refuse** sidewall insulation.
__ **I refuse** sidewall insulation from the exterior.
__ **I refuse** sidewall insulation from the interior.

Owner Signature _____ Date _____

1730 West North Avenue, Milwaukee, WI 53205 • Phone: 414.906.2700 • Fax: 414.906.2719 • cr-sdc.org

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Heating Conversion

(Oil to Gas)

I authorize the Social Development Commission's Weatherization Program to switch my heating source from oil to gas. I am aware that I am responsible for the oil tank and any oil that may be in it.

SDC is not responsible for the removal of the oil tank or the oil.

_____ _____
Signature Job#

_____ _____
Address Date

1730 West North Avenue, Milwaukee, WI 53205 • Phone: 414.906.2700 • Fax: 414.906.2719 • cr-sdc.org

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Brochure Receipt

I acknowledge receipt of the EPA Pamphlets entitled:

1**) The Lead-Safe Certified Guide to Renovate Right**

2) A Brief Guide to Mold, Moisture, and Your Home and

3) A Citizen's Guide to Radon

_____	_____
Print Name	**Job#**
_____	_____
Signature	**Date**
_____	_____
Address	**Unit(s)**

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Free Rider(s) Tenant Information

Date _____

Job#_____

Circle all that apply: **Upper** **Lower** **3rd Floor** **Left Side** **Right Side** **Front House** **Rear House**

Tenant Name:_____

Address:_____

Phone Number(s): _____

Circle all that apply: **Upper** **Lower** **3rd Floor** **Left Side** **Right Side** **Front House** **Rear House**

Tenant Name:_____

Address:_____

Phone Number(s): _____

Circle all that apply: **Upper** **Lower** **3rd Floor** **Left Side** **Right Side** **Front House** **Rear House**

Tenant Name:_____

Address:_____

Phone Number(s): _____

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Weatherization Program
No Contact Form

☐ Pre/Audit Inspection	☐ Weatherization Work	☐ Final Inspection	☐ Callback	☐ State Rework

Job#:_____ **Date:** _____

Customer:_____ **Contactor:**_____

Address:_____

Phone:_____

Note: A no contact consists of <u>at least</u> 1 drive by and 2 telephone calls at different times of the day on different days.

1st Attempt Date:_____ **Time:**_____ **Type of Attempt**_____
Call or Drive By

2nd Attempt Date:_____ **Time:**_____ **Type of Attempt**_____
Call or Drive By

3rd Attempt Date:_____ **Time:**_____ **Type of Attempt**_____
Call or Drive-By

Comments:_____

_____

_____

Contractor signature:_____

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Social Development Commission
Pathways from poverty to success

Your Feedback is Important to Us!

The CR-Social Development Commission (SDC) values its clients and is committed to providing good quality service. As a recent user of SDC's services, your feedback about our service is important to us. Your comments and suggestions will be used to improve our services to better meet your needs.

Please note that your responses will remain anonymous unless you request that we contact you.

1. **What service(s) have you received within the past year?** Please list: _____

2. **At which SDC location(s) did you receive service(s)? Please check all that apply.**
   ☐ 1730 W. North Avenue ☐ South Side: 2968 S. Chase Ave. ☐ United Way: 200 W. Pleasant St.
   ☐ 6848/6850 N. Teutonia Avenue ☐ Other: _____

3. **Name of SDC staff member who assisted you and how was your experience?**
   _____

4. **How would you rate your overall customer service satisfaction with our agency?**
   ☐ Highly Satisfied ☐Satisfied ☐ Dissatisfied ☐ Highly Dissatisfied

5. **How would you rate the quality of the services you received?**
   ☐Excellent ☐Satisfactory ☐Needs Improvement ☐Unacceptable

6. **How likely are you to seek services from SDC again?**
   ☐ Extremely Likely ☐Likely ☐ Not Very Likely ☐ Never

7. **What do you think SDC can improve on; please select one of the options below:**
   ☐Improve customer service
   ☐Explain my paperwork
   ☐Improve timing of the services
   ☐Improve the quality of services
   ☐Provide information about other programs/services
   ☐Other_____
   ☐No Improvement needed, SDC met/exceeded my expectations.

8. **How did you hear about us?**
   ☐Facebook ☐SDC Website ☐Twitter
   ☐News Media ☐Community/ Job Fair ☐Former/Current SDC Customer
   ☐Another Community Organization, who: _____

9. **What benefit(s) do you feel you received as a result of receiving SDC Services?**
   _____
   _____

10. **If your experience has positively impacted your life, would you be willing to share your story?**
    ☐Yes ☐No
    If yes, please provide your contact information in question #11.

11. **Additional Comments:**
    _____
    _____

12. ***I would like SDC to contact me about a program or service, and I am leaving my contact information for that purpose.***
    Name: _____ Telephone #: _____
    E-mail: _____ Address: _____
    SDC program(s) I would like more information on: _____

Thank you for taking the time to complete this survey!

Office Use Only

Quality Program Checked by: _____

SDC Department: _____

Date: _____

Standard Terms and Conditions
(Request for Bids / Proposals)

1.0 SPECIFICATIONS: The specifications in this request are the minimum acceptable. When specific manufacturer and model numbers are used, they are to establish a design, type of construction, quality, functional capability and/or performance level desired. When alternates are bid/proposed, they must be identified by manufacturer, stock number, and such other information necessary to establish equivalency. The State of Wisconsin shall be the sole judge of equivalency. Bidders/proposers are cautioned to avoid bidding alternates to the specifications which may result in rejection of their bid/proposal.

2.0 DEVIATIONS AND EXCEPTIONS: Deviations and exceptions from original text, terms, conditions, or specifications shall be described fully, on the bidder's/proposer's letterhead, signed, and attached to the request. In the absence of such statement, the bid/proposal shall be accepted as in strict compliance with all terms, conditions, and specifications and the bidders/proposers shall be held liable.

3.0 QUALITY: Unless otherwise indicated in the request, all material shall be first quality. Items which are used, demonstrators, obsolete, seconds, or which have been discontinued are unacceptable without prior written approval by the State of Wisconsin.

4.0 QUANTITIES: The quantities shown on this request are based on estimated needs. The state reserves the right to increase or decrease quantities to meet actual needs.

5.0 DELIVERY: Deliveries shall be F.O.B. destination freight prepaid and included unless otherwise specified.

6.0 PRICING AND DISCOUNT: The State of Wisconsin qualifies for governmental discounts and its educational institutions also qualify for educational discounts. Unit prices shall reflect these discounts.

6.1 Unit prices shown on the bid/proposal or contract shall be the price per unit of sale (e.g., gal., cs., doz., ea.) as stated on the request or contract. For any given item, the quantity multiplied by the unit price shall establish the extended price, the unit price shall govern in the bid/proposal evaluation and contract administration.

6.2 Prices established in continuing agreements and term contracts may be lowered due to general market conditions, but prices shall not be subject to increase for ninety (90) calendar days from the date of award. Any increase proposed shall be submitted to the contracting agency thirty (30) calendar days before the proposed effective date of the price increase and shall be limited to fully documented cost increases to the contractor which are demonstrated to be industrywide. The conditions under which price increases may be granted shall be expressed in bid/proposal documents and contracts or agreements.

6.3 In determination of award, discounts for early payment will only be considered when all other conditions are equal and when payment terms allow at least fifteen (15) days, providing the discount terms are deemed favorable. All payment terms must allow the option of net thirty (30).

7.0 UNFAIR SALES ACT: Prices quoted to the State of Wisconsin are not governed by the Unfair Sales Act.

8.0 ACCEPTANCE-REJECTION: The State of Wisconsin reserves the right to accept or reject any or all bids/proposals, to waive any technicality in any bid/proposal submitted, and to accept any part of a bid/proposal as deemed to be in the best interests of the State of Wisconsin.

Bids/proposals MUST be date and time stamped by the soliciting purchasing office on or before the date and time that the bid/proposal is due. Bids/proposals date and time stamped in another office will be rejected. Receipt of a bid/proposal by the mail system does not constitute receipt of a bid/proposal by the purchasing office.

9.0 METHOD OF AWARD: Award shall be made to the lowest responsible, responsive bidder unless otherwise specified.

10.0 ORDERING: Purchase orders or releases via purchasing cards shall be placed directly to the contractor by an authorized agency. No other purchase orders are authorized.

11.0 PAYMENT TERMS AND INVOICING: The State of Wisconsin normally will pay properly submitted vendor invoices within thirty (30) days of receipt providing goods and/or services have been delivered, installed (if required), and accepted as specified.

Invoices presented for payment must be submitted in accordance with instructions contained on the purchase order including reference to purchase order number and submittal to the correct address for processing.

A good faith dispute creates an exception to prompt payment.

12.0 TAXES: The State of Wisconsin and its agencies are exempt from payment of all federal tax and Wisconsin state and local taxes on its purchases except Wisconsin excise taxes as described below.

The State of Wisconsin, including all its agencies, is required to pay the Wisconsin excise or occupation tax on its purchase of beer, liquor, wine, cigarettes, tobacco products, motor vehicle fuel and general aviation fuel. However, it is exempt from payment of Wisconsin sales or use tax on its purchases. The State of Wisconsin may be subject to other states' taxes on its purchases in that state depending on the laws of that state. Contractors performing construction activities are required to pay state use tax on the cost of materials.

13.0 GUARANTEED DELIVERY: Failure of the contractor to adhere to delivery schedules as specified or to promptly replace rejected materials shall render the contractor liable for all costs in excess of the contract price when alternate procurement is necessary. Excess costs shall include the administrative costs.

14.0 ENTIRE AGREEMENT: These Standard Terms and Conditions shall apply to any contract or order awarded as a result of this request except where special requirements are stated elsewhere in the request; in such cases, the special requirements shall apply. Further, the written contract and/or order with referenced parts and attachments shall constitute

the entire agreement and no other terms and conditions in any document, acceptance, or acknowledgment shall be effective or binding unless expressly agreed to in writing by the contracting authority.

15.0 APPLICABLE LAW AND COMPLIANCE: This contract shall be governed under the laws of the State of Wisconsin. The contractor shall at all times comply with and observe all federal and state laws, local laws, ordinances, and regulations which are in effect during the period of this contract and which in any manner affect the work or its conduct. The State of Wisconsin reserves the right to cancel this contract if the contractor fails to follow the requirements of s. 77.66, Wis. Stats., and related statutes regarding certification for collection of sales and use tax. The State of Wisconsin also reserves the right to cancel this contract with any federally debarred contractor or a contractor that is presently identified on the list of parties excluded from federal procurement and non-procurement contracts.

16.0 ANTITRUST ASSIGNMENT: The contractor and the State of Wisconsin recognize that in actual economic practice, overcharges resulting from antitrust violations are in fact usually borne by the State of Wisconsin (purchaser). Therefore, the contractor hereby assigns to the State of Wisconsin any and all claims for such overcharges as to goods, materials or services purchased in connection with this contract.

17.0 ASSIGNMENT: No right or duty in whole or in part of the contractor under this contract may be assigned or delegated without the prior written consent of the State of Wisconsin.

18.0 WORK CENTER CRITERIA: A work center must be certified under s. 16.752, Wis. Stats., and must ensure that when engaged in the production of materials, supplies or equipment or the performance of contractual services, not less than seventy-five percent (75%) of the total hours of direct labor are performed by severely handicapped individuals.

19.0 NONDISCRIMINATION / AFFIRMATIVE ACTION: In connection with the performance of work under this contract, the contractor agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, handicap, sex, physical condition, developmental disability as defined in s. 51.01(5), Wis. Stats., sexual orientation as defined in s. 111.32(13m), Wis. Stats., or national origin. This provision shall include, but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. Except with respect to sexual orientation, the contractor further agrees to take affirmative action to ensure equal employment opportunities.

19.1 Contracts estimated to be over fifty thousand dollars ($50,000) require the submission of a written affirmative action plan by the contractor. An exemption occurs from this requirement if the contractor has a workforce of less than fifty (50) employees. Within fifteen (15) working days after the contract is awarded, the contractor must submit the plan to the contracting state agency for approval. Instructions on preparing the plan and technical assistance regarding this clause are available from the contracting state agency.

19.2 The contractor agrees to post in conspicuous places, available for employees and applicants for employment, a notice to be provided by the contracting state agency that sets forth the provisions of the State of Wisconsin's nondiscrimination law.

19.3 Failure to comply with the conditions of this clause may result in the contractor's becoming declared an "ineligible" contractor, termination of the contract, or withholding of payment.

19.4 Pursuant to s. 16.75(10p), Wis. Stats., contractor agrees it is not, and will not for the duration of the contract, engage in a prohibited boycott of the State of Israel as defined in s. 20.931(1)(b). State agencies and authorities may not execute a contract and reserve the right to terminate an existing contract with a company that is not compliant with this provision. This provision applies to contracts valued $100,000 or over.

19.5 Pursuant to 2019 Wisconsin Executive Order 1, contractor agrees it will hire only on the basis of merit and will not discriminate against any persons performing a contract, subcontract or grant because of military or veteran status, gender identity or expression, marital or familial status, genetic information or political affiliation.

20.0 PATENT INFRINGEMENT: The contractor selling to the State of Wisconsin the articles described herein guarantees the articles were manufactured or produced in accordance with applicable federal labor laws. Further, that the sale or use of the articles described herein will not infringe any United States patent. The contractor covenants that it will at its own expense defend every suit which shall be brought against the State of Wisconsin (provided that such contractor is promptly notified of such suit, and all papers therein are delivered to it) for any alleged infringement of any patent by reason of the sale or use of such articles, and agrees that it will pay all costs, damages, and profits recoverable in any such suit.

21.0 SAFETY REQUIREMENTS: All materials, equipment, and supplies provided to the State of Wisconsin must comply fully with all safety requirements as set forth by the Wisconsin Administrative Code and all applicable OSHA Standards.

22.0 WARRANTY: Unless otherwise specifically stated by the bidder/proposer, equipment purchased as a result of this request shall be warranted against defects by the bidder/proposer for one (1) year from date of receipt. The equipment manufacturer's standard warranty shall apply as a minimum and must be honored by the contractor.

23.0 INSURANCE RESPONSIBILITY: The contractor performing services for the State of Wisconsin shall:

23.1 Maintain worker's compensation insurance as required by Wisconsin Statutes, for all employees engaged in the work.

23.2 Maintain commercial liability, bodily injury and property damage insurance against any claim(s) which might occur in carrying out this agreement/contract. Minimum coverage shall be one million dollars ($1,000,000) liability for bodily injury and property damage including products liability and completed operations. Provide motor vehicle insurance for all owned, non-owned and hired vehicles that are used in carrying out this contract. Minimum coverage shall be one million dollars ($1,000,000) per occurrence

combined single limit for automobile liability and property damage.

23.3 The state reserves the right to require higher or lower limits where warranted.

24.0 CANCELLATION: The State of Wisconsin reserves the right to cancel any contract in whole or in part without penalty due to nonappropriation of funds or for failure of the contractor to comply with terms, conditions, and specifications of this contract.

25.0 VENDOR TAX DELINQUENCY: Vendors who have a delinquent Wisconsin tax liability may have their payments offset by the State of Wisconsin.

26.0 PUBLIC RECORDS ACCESS: It is the intention of the state to maintain an open and public process in the solicitation, submission, review, and approval of procurement activities. Bid/proposal openings are public unless otherwise specified. Records may not be available for public inspection prior to issuance of the notice of intent to award or the award of the contract. Pursuant to §19.36 (3), Wis. Stats., all records of the contractor that are produced or collected under this contract are subject to disclosure pursuant to a public records request. Upon receipt of notice from the State of Wisconsin of a public records request for records produced or collected under this contract, the contractor shall provide the requested records to the contracting agency. The contractor, following final payment, shall retain all records produced or collected under this contract for six (6) years.

27.0 PROPRIETARY INFORMATION: Any restrictions on the use of data contained within a request, must be clearly stated in the bid/proposal itself. Proprietary information submitted in response to a request will be handled in accordance with applicable State of Wisconsin procurement regulations and the Wisconsin public records law. Proprietary restrictions normally are not accepted. However, when accepted, it is the vendor's responsibility to defend the determination in the event of an appeal or litigation.

27.1 Data contained in a bid/proposal, all documentation provided therein, and innovations developed as a result of the contracted commodities or services cannot be copyrighted or patented. All data, documentation, and innovations become the property of the State of Wisconsin.

27.2 Any material submitted by the vendor in response to this request that the vendor considers confidential and proprietary information, and which qualifies as a trade secret, as provided in s. 19.36(5), Wis. Stats., or material which can be kept confidential under the Wisconsin public records law, must be identified on a Designation of Confidential and Proprietary Information form (DOA-3027). Bidders/proposers may request the form if it is not part of the Request for Bid/Request for Proposal package. Bid/proposal prices cannot be held confidential.

28.0 DISCLOSURE: If a state public official (s. 19.42, Wis. Stats.), a member of a state public official's immediate family, or any organization in which a state public official or a member of the official's immediate family owns or controls a ten percent (10%) interest, is a party to this agreement, and if this agreement involves payment of more than three thousand dollars ($3,000) within a twelve (12) month period, this contract is voidable by the state unless appropriate disclosure is made according to s. 19.45(6), Wis. Stats., before signing the contract. Disclosure must be made to the State of Wisconsin Ethics Board, 44 East Mifflin Street, Suite 601, Madison, Wisconsin 53703 (Telephone 608-266-8123).

State classified and former employees and certain University of Wisconsin faculty/staff are subject to separate disclosure requirements, s. 16.417, Wis. Stats.

29.0 RECYCLED MATERIALS: The State of Wisconsin is required to purchase products incorporating recycled materials whenever technically and economically feasible. Bidders are encouraged to bid products with recycled content which meet specifications.

30.0 MATERIAL SAFETY DATA SHEET: If any item(s) on an order(s) resulting from this award(s) is a hazardous chemical, as defined under 29CFR 1910.1200, provide one (1) copy of a Material Safety Data Sheet for each item with the shipped container(s) and one (1) copy with the invoice(s).

31.0 PROMOTIONAL ADVERTISING / NEWS RELEASES: Reference to or use of the State of Wisconsin, any of its departments, agencies or other subunits, or any state official or employee for commercial promotion is prohibited. News releases pertaining to this procurement shall not be made without prior approval of the State of Wisconsin. Release of broadcast e-mails pertaining to this procurement shall not be made without prior written authorization of the contracting agency.

32.0 HOLD HARMLESS: The contractor will indemnify and save harmless the State of Wisconsin and all of its officers, agents and employees from all suits, actions, or claims of any character brought for or on account of any injuries or damages received by any persons or property resulting from the operations of the contractor, or of any of its contractors, in prosecuting work under this agreement.

33.0 FOREIGN CORPORATION: A foreign corporation (any corporation other than a Wisconsin corporation) which becomes a party to this Agreement is required to conform to all the requirements of Chapter 180, Wis. Stats., relating to a foreign corporation and must possess a certificate of authority from the Wisconsin Department of Financial Institutions, unless the corporation is transacting business in interstate commerce or is otherwise exempt from the requirement of obtaining a certificate of authority. Any foreign corporation which desires to apply for a certificate of authority should contact the Department of Financial Institutions, Division of Corporation, P. O. Box 7846, Madison, WI 53707-7846; telephone (608) 261-7577.

34.0 WORK CENTER PROGRAM: The successful bidder/proposer shall agree to implement processes that allow the State agencies, including the University of Wisconsin System, to satisfy the State's obligation to purchase goods and services produced by work centers certified under the State Use Law, s.16.752, Wis. Stat. This shall result in requiring the successful bidder/proposer to include products provided by work centers in its catalog for State agencies and campuses or to block the sale of comparable items to State agencies and campuses.

35.0 FORCE MAJEURE: Neither party shall be in default by reason of any failure in performance of this Agreement in accordance with reasonable control and without fault or negligence on their part. Such causes may include, but are not restricted to, acts of nature or the public enemy, acts of the government in either its sovereign or contractual capacity, fires, floods, epidemics, quarantine restrictions,

strikes, freight embargoes and unusually severe weather, but in every case the failure to perform such must be beyond the reasonable control and without the fault or negligence of the party.

PART B - SUPPLEMENTAL TERMS AND CONDITIONS
(REV.05/05/2017)

1.0 ACCEPTANCE OF BID/PROPOSAL CONTENT: The contents of the bid/proposal of the successful contractor will become contractual obligations if procurement action ensues.

2.0 CERTIFICATION OF INDEPENDENT PRICE DETERMINATION: By signing this bid/proposal, the bidder/proposer certifies, and in the case of a joint bid/proposal, each party thereto certifies as to its own organization, that in connection with this procurement:

2.1 The prices in this bid/proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other bidder/proposer or with any competitor;

2.2 Unless otherwise required by law, the prices which have been quoted in this bid/proposal have not been knowingly disclosed by the bidder/proposer and will not knowingly be disclosed by the bidder/proposer prior to opening in the case of an advertised procurement or prior to award in the case of a negotiated procurement, directly or indirectly to any other bidder/proposer or to any competitor; and

2.3 No attempt has been made or will be made by the bidder/proposer to induce any other person or firm to submit or not to submit a bid/proposal for the purpose of restricting competition.

2.4 Each person signing this bid/proposal certifies that: He/she is the person in the bidder's/proposer's organization responsible within that organization for the decision as to the prices being offered herein and that he/she has not participated, and will not participate, in any action contrary to 2.1 through 2.3 above; (or)

He/she is not the person in the bidder's/proposer's organization responsible within that organization for the decision as to the prices being offered herein, but that he/she has been authorized in writing to act as agent for the persons responsible for such decisions in certifying that such persons have not participated, and will not participate in any action contrary to 2.1 through 2.3 above, and as their agent does hereby so certify; and he/she has not participated, and will not participate, in any action contrary to 2.1 through 2.3 above.

3.0 DISCLOSURE OF INDEPENDENCE AND RELATIONSHIP:

3.1 Prior to award of any contract, a potential contractor shall certify in writing to the Agency that no relationship exists between the potential contractor and the procuring or contracting Agency that interferes with fair competition or is a conflict of interest, and no relationship exists between the contractor and another person or organization that constitutes a conflict of interest with respect to a Agency contract. The Agency, with approval from the State of Wisconsin, may waive this provision, in writing, if those activities of the potential contractor will not be adverse to the interests of the Agency.

3.2 Contractors shall agree as part of the contract for services that during performance of the contract, the contractor will neither provide contractual services nor enter into any agreement to provide services to a person or organization that is regulated or funded by the contracting Agency or has interests that are adverse to the contracting Agency. The Agency, with approval from the State of Wisconsin, may waive this provision, in writing, if those activities of the contractor will not be adverse to the interests of the Agency.

4.0 EMPLOYMENT: The contractor will not engage the services of any person or persons now employed by the State of Wisconsin, including any department, commission or board thereof, to provide services relating to this agreement without the written consent of the employing Agency of such person or persons and of the contracting Agency.

5.0 RECORDKEEPING AND RECORD RETENTION:

5.1 The contractor shall establish and maintain adequate records of all expenditures incurred under the contract. All records shall be kept in accordance with generally accepted accounting procedures. All procedures shall be in accordance with federal, Agency and local ordinances.

The Agency and the state shall have the right to audit, review, examine, copy, and transcribe any pertinent records or documents relating to any contract resulting from this bid/proposal held by the contractor. The contractor (and any subcontractors) will retain all documents applicable to the contract for a period of not less than three (3) years after final payment is made.

Note that if any litigation, claim or audit is started at the Agency before the expiration date of the 3-year period, the contractor shall be notified by the Agency and shall retain records until all litigation, claims or audit findings involving records have been resolved and final action taken.

6.0 INDEPENDENT CAPACITY OF CONTRACTOR: The parties hereto agree that the contractor, its officers, agents, and employees, in the performance of this agreement shall act in the capacity of an independent contractor and not as an officer, employee, or agent of the Agency. The contractor agrees to take such steps as may be necessary to ensure that each subcontractor of the contractor will be deemed to be an independent contractor and will not be considered or permitted to be an agent, servant, joint venturer, or partner of the Agency.

7.0 NON-PERFORMANCE BY CONTRACTOR: If the contractors and/or subcontractors do not fulfill obligations of this contract, they may be removed from the bidder's list for a period of 2 to 5 years.

8.0 BRAND NAME OR EQUAL:

8.1 The bidder shall list brand names and stock numbers for all exchanges. Substitutions are expected to be equal to or exceed the quality of specified items. The Agency has the right to reject any or all substitutions that do not meet minimum material standards.

8.2 If items called for by this RFB have been identified in the Schedule by a "brand name or equal" description, such identification intended to be descriptive, but not restrictive, and is to indicate the quality and characteristics of products that will be satisfactory. Bids offering "equal" products including products of the brand name manufacturer other than the one described by brand name will be considered for award if such products are clearly identified in the bids, and are determined by the Agency to meet fully the salient characteristic requirements referenced in the Invitation for Bid.

8.3 Unless the bidder clearly indicates in his/her bid that he/she is offering an "equal" product, the bid shall be considered as offering a brand name product referenced in the Invitation for Bid.

8.4 If the Bidder proposes to modify a product so as to make it conform to the requirements of the Invitation for Bid, he/she shall:

- Include in his/her bid a clear description of such proposed modifications.
- Clearly mark any descriptive material to show the proposed modifications.

8.5 Modifications proposed after bid opening to make a product conform to a brand name product referenced in the RFB will not be considered.

9.0 ONLY RECOURSE FOR PAYMENT IS WEATHERIZATION AGENCY: By agreeing to perform weatherization work the Vendor agrees to the following terms and agrees to pass along the following requirements to their suppliers and any subcontractors:

9.1 The Vendor agrees that they will not, under any circumstances, seek payment from the owner or occupant of the premises improved.

9.2 The Vendor shall not file, suffer or permit any lien or other encumbrance of record as a claim against any site of a weatherization project in recognition that the only recourse for payment is from the weatherization agency.

9.3 When specified in the RFB, signed lien waivers for each individual work location/property are required (when the property to receive the improvement is identified) from all parties providing any labor and materials, including the Vendor, subcontractors and suppliers. The Vendor agrees to inform any party supplying labor and/or material to an identified property, prior to engaging such parties in providing weatherization services, that lien waivers are required in order for the Vendor to invoice the weatherization agency for the job.

10.0 Any lien notice action by a Vendor, and/or any of their subcontractors and/or material suppliers, against a property owner shall be considered non-performance by the terms and conditions of this contract, and the Vendor may be removed from the statewide weatherization agency bidder's list for a period of 2 to 5 years, as may any subcontractors and suppliers that take such action.

11.0 PAYMENTS OWED BY VENDOR: By engaging in a contract with the weatherization agency, the Vendor agrees that if they do not pay for materials and labor taking place through this weatherization contract, the weatherization agency has the option to use payments owed to the Vendor to pay such subcontractors and suppliers.

12.0 The Agency reserves the right to cancel this Contract in whole or in part without penalty, upon written notice to the Contractor if any lien notice action is taken by the Contractor, and/or any of their subcontractors and/or material suppliers, against a property owner.

13.0 Confidential, Proprietary, and Personally Identifiable Information: The contractor shall not use Confidential, Proprietary or Personally Identifiable Information ("Confidential Information") such as customer name and address for any purpose other than the limited purposes set forth in this Contract and all related and necessary actions taken in fulfillment of the obligations thereunder.

13.1 The Contractor shall hold all Confidential Information in confidence and shall not disclose such Confidential Information to any persons other than those directors, officers, employees, and agents who have a business-related need to have access to such information in furtherance of the limited purposes of this Contract and who have been apprised of, and agree to maintain, the confidential nature of such information in accordance with the terms of this Contract.

13.2 Contractor shall require all such Representatives to read and sign a non-disclosure statement and shall be responsible for the breach of this Contract by any said Representatives.

13.3 Contractor shall institute and maintain such security procedures as are commercially reasonable to maintain the confidentiality of the Confidential Information while in its possession or control including transportation, whether physically or electronically.

14.0 LEAD SAFE REQUIREMENTS – WEATHERIZATION PROGRAM: Whenever paint is disturbed in a dwelling constructed prior to 1978 that is not certified as lead-free, or painted surfaces to be disturbed have not tested free of lead, applicable lead safe requirements shall be followed. For such work, contractors shall demonstrate compliance with training and any related certification requirements, work practices, and documentation requirements. Contractors shall comply with current regulations of all authorities having jurisdiction.

14.1 Weatherization Program Requirements: When a painted area disturbed is 6 ft^2 or less of interior surface per room or 20 ft^2 or less of exterior surface, and does not involve window replacement or demolition, lead safe setup, containment, and cleanup procedures shall be followed. Contractors shall document that lead safe work was performed by photo-graphing setup, containment, and cleanup procedures.

14.2 DHS Requirement: When a painted area disturbed is more than 6 ft^2 of interior surface per room, more than 20 ft^2 of exterior surface, or involves window replacement or demolition, a Department of Health Services (DHS) Certified Lead Safe Renovator shall be onsite to ensure proper setup, containment, and cleanup procedures are followed and a Wisconsin Weatherization Assistance Program Renovation Recordkeeping Checklist shall be completed for each job. Contractors shall document that lead safe work was performed by photographing setup, containment, and cleanup procedures.

15.0 ASBESTOS - WEATHERIZATION PROGRAM: Contractors may encounter asbestos containing materials (ACM), or suspect ACM, during work on a weatherization job. Contractors shall comply with current regulations of all authorities having jurisdiction. According to the Wisconsin Department of Health Services (DHS), all building components except for metal, glass, wood, and fiberglass shall either be assumed to contain asbestos or proven not to contain asbestos through bulk sampling by a certified Asbestos Inspector and analysis by an accredited laboratory. Photo documentation of asbestos containment and safety practices is required.

15.1 Operations and Maintenance (O&M) Any worker who may disturb known or suspect ACM while performing contracted work shall complete O&M training, which allows no more ACM to be disturbed or incidentally removed than would fit into a 60" by 60" glove bag, properly filled and sealed.

15.2 Work Exceeding O&M Limits: If greater amounts of known or suspect ACM will be disturbed during contracted work, additional training and DHS certifications are required, including certification as Asbestos Company. Work exceeding the O&M limits shall be performed by individuals with DHS Asbestos Worker certification at minimum, and shall be supervised by a DHS certified Asbestos Supervisor.

15.3 Working with Transite (slate) Siding or Stucco Siding: Disturbance of these materials always requires DHS certification, regardless of the amount disturbed. Disturbance of slate siding requires an Exterior Asbestos Worker and/or an Exterior Asbestos Supervisor (the regular Asbestos Supervisor certification also allows for disturbance of slate siding). Stucco may only be disturbed by someone with Asbestos Worker certification (supervised by an Asbestos Supervisor) or an Asbestos Supervisor.

16.0 ASBESTOS – EMERGENCY FURNACE SERVICE: Contractors may encounter asbestos containing materials (ACM), or suspect ACM, during work on an Emergency Furnace job. Contractors shall comply with current regulations of all authorities having jurisdiction.

16.1 Operations and Maintenance (O&M): The Occupational Safety & Health Administration (OSHA) requires any worker who will disturb known or suspect ACM while performing contracted work shall complete O&M training, which allows no more ACM to be disturbed or incidentally removed than would fit into a 60" by 60" glove bag, properly filled and sealed.

16.2 Work Exceeding O&M Limits: If greater amounts of known or suspect ACM will be disturbed during contracted work, additional training and DHS certifications are required, including certification as Asbestos Company. Work exceeding the O&M limits shall be performed by individuals with DHS Asbestos Worker certification at minimum, and shall be supervised by a DHS certified Asbestos Supervisor.

17.0 Byrd Anti-Lobbying Amendment (31 U.S.C 1352): Contractors who apply or bid for an award of $100,000 or more shall file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier shall also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the recipient.