

REQUEST FOR PROPOSAL

Wisconsin Home Energy Assistance Program (WHEAP) and Services FFY2020

Issued Date: May 23, 2019

Responses Due: July 1, 2019



Table of Contents

1 RFP_GENERAL INFORMATION	4
1.1 RFP_DEFINITIONS.....	4
1.2 RFP_INTRODUCTION AND PURPOSE.....	6
1.3 RFP_SCOPE OF WORK	6
1.3.1 Program Requirements	7
1.3.2 Service Statistics.....	8
1.4 RFP_PROCURING AND CONTRACTING AGENCY	8
1.5 RFP_CLARIFICATIONS AND/OR REVISIONS TO THE SPECIFICATIONS AND REQUIREMENTS	8
1.6 RFP_NEWS RELEASES	9
1.7 RFP_VENDOR CONFERENCE & QUESTIONS	9
1.8 RFP_REASONABLE ACCOMODATIONS	9
1.9 RFP_CALENDAR OF EVENTS	9
1.10 RFP_CONTRACT TERM AND FUNDING.....	9
2 RFP_PREPARING AND SUBMITTING A PROPOSAL	10
2.1 RFP_GENERAL INSTRUCTIONS	10
2.2 RFP_INCURRING COSTS.....	10
2.3 RFP_COMPLETE RESPONSES	10
2.4 RFP_SUBMITTING THE PROPOSAL	10
2.4.1 RFP_HARD COPY PROPOSAL SUBMITTAL	11
2.4.2 RFP_COST PROPOSAL SUBMISSION	11
2.4.3 RFP_BUILDING SECURITY POLICY.....	12
2.5 RFP_PROPOSAL ORGANIZATION AND FORMAT	12
2.6 RFP_PRESENTATIONS; DEMONSTRATIONS.....	14
2.7 RFP_MULTIPLE PROPOSALS	14
2.8 RFP_WITHDRAWL OF PROPOSALS	15
2.9 RFP_LATE PROPOSALS.....	15
3 RFP_PROPOSAL SELECTION AND AWARD PROCESS	15
3.1 RFP_PRELIMINARY EVALUATION	15
3.2 RFP_EVALUATION COMMITTEE	15
3.3 RFP_ACCEPTED PROPOSALS.....	16
3.4 RFP_EVALUATION CRITERIA.....	16
3.5 RFP_SUPPLIER DIVERSITY	17
3.5.2 RFP_VETERAN-OWNED BUSINESS	17
3.5.3 RFP_DISABLED VETERAN-OWNED BUSINESS.....	17
3.5.4 RFP_WOMAN-OWNED BUSINESS ENTERPRISE.....	17

3.6 RFP_RIGHT TO REJECT PROPOSALS.....	18
3.7 RFP_AWARD AND FINAL OFFERS	18
3.8 RFP_CONTRACT NEGOTIATION.....	18
3.9 RFP_CONTRACT NEGOTIATIONS IMPASSE.....	18
3.10 RFP_NOTIFICATION OF INTENT TO AWARD.....	18
3.11 RFP_APEALS PROCESS.....	19
4 RFP_MANDATORY PROPOSAL REQUIREMENTS	19
4.1 RFP_SERVICES PERFORMED WITHIN THE U.S.....	19
4.2 RFP_DEBARMENT.....	20
4.3 RFP_PROPOSER REFERENCES.....	20
4.4 RFP_CONTRACT TERMINATION HISTORY	20
4.5 RFP_SUBCONTRACTORS.....	21
5 RFP_GENERAL REQUIREMENTS (20 POINTS)	21
5.1 RFP_ORGANIZATIONAL CAPABILITIES.....	21
5.2 RFP_STAFF QUALIFICATIONS	21
6 RFP_TECHNICAL REQUIREMENTS (200 POINTS)	22
6.1 Service Plan Requirements	22
7 RFP_COST PROPOSAL (20 POINTS)	27
7.1 RFP_COST WORKSHEETS.....	27
7.2 RFP_CONSIDERATION OF ALL INHERENT COSTS.....	27
7.3 RFP_FIXED PRICING	27
7.4 RFP_PRICE CLARIFICATION.....	28
8 RFP_SPECIAL TERMS AND CONDITIONS	29
9 RFP_LIST OF REQUIRED FORMS AND DOCUMENTS.....	29

1 RFP_GENERAL INFORMATION AND PERFORMANCE REQUIREMENTS

The Wisconsin Home Energy Assistance Program (WHEAP) administers the federally-funded Low Income Home Energy Assistance Program (LIHEAP) and Public Benefits Energy Assistance Program. WHEAP and its related services are aimed to assist Wisconsin households in reducing their energy burden.

St. Croix County intends to purchase the delivery of WHEAP services for Federal Fiscal Year 2020, October 1, 2019 through September 30, 2020, outlined in the following expectations:

- Conduct ongoing outreach efforts to ensure as many households as possible with the greatest needs receive WHEAP benefits.
- Strive to maintain or increase the current WHEAP paid caseload compared to prior year's caseload.
- Coordinate outreach, intake and referral activities with other local organizations including the county's Weatherization agency.
- Process Home Energy Plus applications for heating and/or non-heating electronic benefits during the regular season.
- Process Emergency Crisis Assistance requests during the regular season to include 24/7 on-call capability.
- Process heating and non-heating proactive crisis assistance services year-round, such as energy or financial education, energy and weatherization goods, and co-payment agreements and match payments for recipients.
- Process furnace program requests for repair or replacement.
- Meet required spending thresholds for initial benefits and services allocations estimated at approximately \$80,000 total and any potential contract addendum allocations in the contract period.
- Conduct general and furnace quality assurance reviews.
- Maintain knowledge of Keep Wisconsin Warm/Cool Funds (KWW/CF) and expend funds per guidelines if awarded.

1.1 RFP_DEFINITIONS

For the purposes of this RFP and resulting Contract, words and terms shall be given their ordinary and usual meanings. Where capitalized in this RFP and resulting Contract, the following words and terms shall have the meanings indicated. The meanings shall be applicable to the singular, plural, masculine, feminine and neuter.

"PB" Public Benefit (PB) is the Wisconsin's State Public Benefits Program for electric (non-heating) fuel.

"Contract Administrator" the Agency employee responsible for oversight of the implementation, administration, and completion of the Contract.

"Contract Manager" the employee of an Agency responsible for 1) resolving contractual matters that cannot be resolved with the Contract Administrator; and 2) facilitating and/or completing all official actions under the Contract including but not limited to amendments, renewals and termination.

"Contract" means the final version of any contractually binding agreement between the Agency and the Contractor relating to the subject matter of this RFP; references to the Contract include all exhibits, attachments and other documents attached thereto or incorporated therein by reference.

“Contractor” the person or entity that has been awarded the Contract as a result of this RFP, and who is required to provide equipment, materials, supplies, contractual services, or leasing real property to, the Agency.

“Division of Energy, Housing and Community Resources (DEHCR)” is a Division of the Wisconsin Department of Administration that manages the Home Energy Plus programs.

“Disabled Veteran-Owned Business (DVB)” means a business that has been certified by the Department of Administration under §16.283, Wis. Stats.

“Effective Date” means the date the Contract has been fully executed by the Contractor and the Agency.

“Expected” means an Agency’s requirement should be present in the proposed solution, exactly as stated, but the lack of the requirement would not disqualify the solution. However, the lack of one or more expected requirements will reduce a solutions technical score.

“Home Energy Plus (HE+)” is the umbrella term used for WHEAP and the Weatherization Assistance Programs. It also refers to the Home Energy Plus Web site, (<http://www.homeenergyplus.wi.gov>).

“Low Income Home Energy Assistance Program (LIHEAP)” is the federally designated Low Income Home Energy Assistance Program under 42 U.S.C. 8621. The program provides benefits and services to assist low-income households with the costs of energy used for home heating.

“Mandatory” means a requirement labeled as such must be present in the proposed solution, exactly as stated, or the solution will not be considered by the Agency. The terms “must,” “shall,” and “will” are considered mandatory.

“Minority Owned Business Enterprise (MBE)” means a business that has been certified by the Department of Administration under §16.287, Wis. Stats.

“Procurement Manager” means the person responsible for managing this procurement process.

“Proposal” means the complete response to this RFP submitted on the approved forms, in the required manner and setting forth the Proposer’s prices for providing the products and services described in the RFP.

“Proposer” means the entity submitting a Proposal in response to this RFP.

“Responsible” means a Proposer who has furnished information and data to prove that the financial resources, service, facilities, personnel, service reputation, and experience are adequate to make satisfactory delivery of such Services and Deliverables set forth in the RFP.

“Responsive” means a proposal that conforms in all material respects to the requirements set forth in the RFP.

“RFP” means this Request for Proposal.

“Wisconsin Home Energy Assistance Program (WHEAP)” is Wisconsin’s LIHEAP and PB program.

1.2 RFP_INTRODUCTION AND PURPOSE

St. Croix County is requesting proposals from service providers (Proposer) for the administration and delivery of the Wisconsin Home Energy Assistance Program (WHEAP).

WHEAP is funded by the U.S. Department of Health and Human Services' (HHS) Low Income Home Energy Assistance Program (LIHEAP) and Wisconsin's Public Benefit (PB) program. WHEAP aims to reduce a household's energy burden by providing a one-time payment to assist with a portion of the heating cost to low-income households that are at or below the 60 percent State Median Income limit. A household may also be eligible to receive a payment for non-heating electric costs through funding provided by the PB program.

Eligibility criteria determination and authorization of WHEAP is according to the policies of the Division of Energy, Housing & Community Resources (DEHCR) as contained in the WHEAP Operations Manual.

The WHEAP Operations Manual is available at the Home Energy Plus (HE+) Website:

<http://www.homeenergyplus.wi.gov/>

1.3 RFP_SCOPE OF WORK

St. Croix County (the Agency) intends to use the results of this process to award a contract to provide services as described in this RFP.

The awarded Contractor shall be responsible for conducting the daily operation of WHEAP at an approved facility. The awarded Contractor shall be responsible for the orderly safekeeping, maintenance, and operation of all equipment and facilities in use for the operation of the program. The awarded Contractor shall follow industry standards, best practices, and applicable Federal, State and local regulations and standards to ensure safe operations for employees, customers and the general public.

Through the selection process, the awarded Contractor should meet the following objectives:

- Fully administer the WHEAP in accordance with the WHEAP Operations Manual and Home Energy Plus (HE+) Furnace Manual
- To efficiently and accurately determine eligibility for applicants and process benefit/service requests in a policy compliant and timely manner
- Provide case management for all customers
- To operate various site(s) through St. Croix County in order to provide sufficient access to County residents
- Provide a local or toll-free telephone number that people can call, year-round, to inquire about the Home Energy Plus programs
- Maintain a 24/7 crisis contact number for evenings and weekend emergencies
- Provide a public website with information regarding WHEAP. It shall include, but is not limited to, application requirements, application site(s) and hours of operations and emergency/after-hours procedures

- Authorize payments, fuel delivery, and/or disconnection prevention to eligible individuals to meet emergency energy needs
- Provide eligibility for and administration of the HE+ Furnace Program
- Annually complete the DEHCR required Crisis Plan and Program Operations and Community Services Plan
- Implement and maintain an HE+ compliant General Quality Assurance Plan and Furnace Quality Assurance Plan
- Participate in Administrative Reviews and Desktop Monitoring (DTM) conducted by the Division of Energy, Housing & Community Resources
- Provide outreach services to maximize participation of WHEAP
- Ensure that persons with limited English proficiency (LEP) or are disabled/impaired have equal access to benefits and services
- Complete HE+ policy compliant internal General Quality Assurance and Furnace Quality Assurance activities
- Establish a disaster plan according to the WHEAP Operations Manual
- Annually attend the Home Energy Plus Training Event
- Provide accurate monthly billing of all activity by funding source in accordance with the approved annual budget and the WHEAP Operations Manual

1.3.1 Program Requirements

The Proposer shall administer the following programs throughout the program year, in accordance with the WHEAP Operations Manual:

WHEAP – Regular Benefits

Regular Benefits provide assistance with current season heating (LIHEAP) and/or non-heating electric (PB) expenses. Regular Benefits are provided on behalf of eligible households to the energy vendor (utility or bulk fuel vendor) or, in a limited number of situations, directly to the applicant. Households may be eligible for one or both of the benefits. Households may receive only one regular heat and/or one regular electric (non-heating) benefit during each heating season (October 1 to May 15). Regular Benefits provide assistance with the home energy bills and are not intended to cover the total costs of heat or electricity.

WHEAP – Crisis Assistance Benefits

Crisis Assistance, whether LIHEAP or PB, is intended to allow the local WHEAP administering agency to respond to special situations; dealing with emergency situations or acting proactively to avoid energy loss. Crisis Assistance is a discretionary benefit to households; even if a household is eligible, they may not receive crisis assistance. The eligibility requirements are determined by St. Croix County.

Crisis Services funds are also allocated to local WHEAP agencies to provide a mechanism for purchase of services (such as education—energy or financial) and goods (such as Weatherization kits) for customers. These funds may also be used to cover local agency costs of processing applications for Crisis Assistance.

WHEAP – Furnace Service

Eligible households, whose furnace (heating system) ceases to operate or presents a safety threat to the household, may be eligible to receive furnace services. Eligibility for furnace services shall be determined by the local WHEAP agency before any service is provided. Furnace services are a discretionary benefit to households; even if a household is eligible, they may not receive services.

The HE+ Furnace Program eligibility criteria and service requirements are outlined in the HE+ Furnace Program Manual.

1.3.2 Service Statistics

In Federal Fiscal Year (FFY) 2018, there were 1,141 applications processed and over \$504,610 dollars issued in regular and crisis benefits to St. Croix County residents. Additional information on FFY 2018 and prior years for St. Croix County, the State of Wisconsin, and other counties can be found on the Detailed Reports page of the Wisconsin Home Energy Plus webpage via <http://homeenergyplus.wi.gov/category.asp?linkcatid=273&linkid=120&locid=25>

Customer Data	Count	Expenditures
Total Number of Households Applied for Regular Benefits	1,141	
Number of Households Paid Regular Benefit	1,003	\$504,610
Average Heat Benefit	\$370	\$349,868
Average PB Benefit	\$185	\$154,743
Total Number Households Paid Crisis Assistance	154	\$67,931
Average Heat Benefit	\$392	\$45,905
Average PB Benefit	\$524	\$22,026
Total Heating Unit Repairs Paid	13	\$11,432
Total Heating Unit Replacement Paid	20	\$80,287

1.4 RFP_PROCURING AND CONTRACTING AGENCY

St. Croix County is a local administrative and executive Wisconsin Home Energy Assistance Program service agency. The Division of Energy, Housing and Community Resources (DEHCR) contracts with counties and tribes within the State of Wisconsin for local administration and delivery of WHEAP services.

1.5 RFP_CLARIFICATIONS AND/OR REVISIONS TO THE SPECIFICATIONS AND REQUIREMENTS

If a Proposer discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the Proposer should immediately notify Ronda Brown at ronda.brown@sccwi.gov via e-mail (no phone calls).

In the event that it becomes necessary to provide additional clarifying data or information, or to revise any part of this RFP, addendums or amendments will be provided at the website www.sccwi.gov.

No phone calls, emails or other correspondence to other staff regarding this procurement are permitted during the procurement process unless otherwise noted in writing as required as part of the solicitation process. Violation of these conditions may be considered sufficient cause for automatic rejection of a Proposal. All oral communications are unofficial and non-binding on the Agency. Proposers shall rely only on written statements issued by the Procurement Manager.

1.6 RFP_NEWS RELEASES

A Proposer may not issue news releases or make any statements to the news media pertaining to the subject of this RFP or any Proposals or Contracts resulting therefrom without the prior written approval of the Agency. The Proposer is bound by this clause from the time the RFP is issued until the time the Contract has expired. Release of broadcast emails pertaining to this procurement shall not be made without prior written authorization of Agency.

1.7 RFP_VENDOR CONFERENCE & QUESTIONS

There will **not** be a Vendor Conference. Instead, there is an opportunity for Proposer questions to be submitted for an Agency response (see Calendar of Events for dates).

All questions must be submitted in writing via e-mail to Ronda Brown at ronda.brown@sccwi.gov by the deadline. Proposer questions along with the Agency's responses shall be posted to website.

1.8 RFP_REASONABLE ACCOMODATIONS

Agency shall provide reasonable accommodations, including the provision of informational material in an alternative format, for individuals with disabilities upon request. If you need accommodations at a presentation or demonstration, contact Ronda Brown at ronda.brown@sccwi.gov.

1.9 RFP_CALENDAR OF EVENTS

Listed below are important dates and times by which actions related to this RFP shall be completed. In the event that the Agency finds it necessary to change any of these dates and times, it shall do so by issuing an amendment to this RFP.

DATE	EVENT
May 23, 2019	Request for Proposal Issued
June 1, 2019	Deadline for submitting Proposer written questions
June 15, 2019	Date for Responses to Proposer questions
July 1, 2019 (3:00 p.m. CT)	Proposal due date

1.10 RFP_CONTRACT TERM AND FUNDING

The Contract period shall be an initial one year from the effective date. The Contract is eligible for three possible additional one-year renewals if mutually agreeable to the Agency and the Contractor, unless terminated. To ensure the delivery of improved services and competitive pricing, to address potential performance issues, changes in technology or industry consolidation, the Agency reserves the right to negotiate the pricing and terms at the time of contract renewal.

As required by Wisconsin Statutes, continuance of a Contract beyond the limits of funds available shall be contingent upon appropriation of the necessary funds, and the termination of the Contract by lack of appropriations shall be without penalty.

2 RFP_PREPARING AND SUBMITTING A PROPOSAL

This section explains how the proposal should be constructed and on what terms before it can be considered responsive.

2.1 RFP_GENERAL INSTRUCTIONS

The evaluation and selection of a Contractor will be based on the information submitted in the Proposal plus references. Any required presentations, on-site visits, or oral interviews are optional at the discretion of the Agency. Failure to respond to each of the requirements as directed in the RFP may be the basis for rejecting a response.

Elaborate Proposals (e.g., expensive artwork, marketing materials) beyond that sufficient to present a complete and effective Proposal are not necessary or desired.

2.2 RFP_INCURRING COSTS

The Agency shall not be responsible for any costs incurred by Proposer to prepare its Proposal, conduct its due diligence or negotiate any agreements whether or not finally awarded. Such Proposal and business development costs shall not be included in the cost basis of services to be provided to the Agency.

2.3 RFP_COMPLETE RESPONSES

Proposal responses to each of the requests for information and requirements in the numbered sections shall be in the same sequence and numbered as the RFP.

Responses shall be concise yet complete. Do not simply restate the requirement verbatim as the response to a requirement. If the RFP calls for a process description, include a process map as well as the frequency at which that map shall be updated. Proposer shall not direct the reader to a website (or any other sources outside of the submitted Proposal) as part of its response to the requirement or question.

2.4 RFP_SUBMITTING THE PROPOSAL

Proposers have three options in responding to this RFP as follows:

Electronically: via email (10 MB Limit) to ronda.brown@sccwi.gov

U.S. Mail:
St. Croix County Services Center
Attn: Ronda Brown
1752 Dorset Lane
New Richmond WI 54017

In Person:
St. Croix County Services Center
Attn: Ronda Brown
1752 Dorset Lane
New Richmond WI 54017

2.4.1 RFP_HARD COPY PROPOSAL SUBMITTAL

Proposers have the option to mail or otherwise provide a hard copy Proposal when responding to this RFP. Proposer shall submit an original and two (2) copies, clearly labeled as such, for acceptance of its Proposal by the deadline shown below. The Agency is not responsible for deliveries that do not reach the St. Croix County Services Center office by the required due date and time.

The Cost Proposal shall be sealed and submitted as a separate part of the Proposal. No mention data within the Cost Proposal is permissible in the response to any other section of the Proposal. All materials required for acceptance of the Proposal by the deadline must be sent to:

- St. Croix County Services Center
- Attn: Ronda Brown
- 1752 Dorset Lane
- New Richmond WI 54017

Proposals shall be received by the above office no later than **3:00 p.m. CT on July 1, 2019**. All Proposals shall be date and time-stamped in by the Agency (hard copy) on or prior to the Agency opening date and time. Proposals not so stamped will be considered late and rejected.

All Proposals shall be packaged, sealed and show the following information on the outside of the package:

- Proposer's (Company) Name and Address
- **PROPOSAL** for RFP Title Wisconsin Home Energy Assistance Program (WHEAP) and Services FFY2020
- (Procurement Manager Name), (Title)
- Due: July 1, 2019 by 3:00 p.m. CT

2.4.2 RFP_COST PROPOSAL SUBMISSION

Proposer shall submit an original and two (2) copies, clearly labeled as such for acceptance of its Cost Proposal by the deadline shown below.

The Cost Proposal shall be sealed and submitted as a separate part of the Proposal. No mention of the Cost Proposal is permissible in the response to any other section of the RFP. The outside of the envelope must be clearly labeled on the outside of the package as follows:

- Proposer's (Company) Name and Address
- **COST PROPOSAL** for RFP Title Wisconsin Home Energy Assistance Program (WHEAP) and Services FFY2020

- (Procurement Manager Name), (Title)
- Due: July 1, 2019 by 3:00 p.m. CT

The Cost Proposal shall be packaged, addressed and sealed in the same manner as described above. The Cost Proposal is due to the addressee on the same date and time previously mentioned.

Faxed Proposals are not accepted.

Proposals that arrive unpackaged or unsealed shall not be accepted.

-

2.4.3 RFP_PROPOSAL SUBMISSIONS

The bid due date and time will not be adjusted to accommodate tardiness, nor will any exceptions to the due date and time be made. The Agency is not responsible for deliveries that do not reach their destination by the required due date and time.

2.5 RFP_PROPOSAL ORGANIZATION AND FORMAT

Proposers responding to this RFP must comply with the following format requirements. The Agency reserves the right to exclude any responses from consideration that do not follow the required format as instructed below.

Proposals shall be organized and presented in the order and by the numbers assigned in the RFP with each heading and subheading separated by tabs or otherwise clearly marked and labeled.

A Proposal shall be typed and submitted on 8.5 by 11 inch paper bound securely. The Proposal cover page must include, at a minimum, the RFP name, and the Proposer's name.

Unless specifically requested, promotional literature is not desired and will not be considered to meet any of the requirements of this RFP.

Only information that can be identified as a trade secret, proprietary and confidential on required forms will be treated as such. **Proposer shall not label or identify their entire Proposal as confidential.**

Tab 1 - Table of Contents: Provide a table of contents for the Proposal submitted.

Tab 2 - Transmittal Letter: Provide a transmittal letter that clearly identifies all of the following:

1. Proposer's organization information
 - Name and title of Proposer representative; and
 - Name and address of company; and
 - Telephone number, fax number, and email address.
2. A confirmation of Acknowledge the receipt of RFP addenda; if none has been posted, include a statement to that effect; and
3. A statement acknowledging the Proposal conforms to all requirements of the Agency including procurement rules and procedures articulated in this RFP; and

4. A statement that (*Proposer's Name*) understands and agrees that it has an affirmative duty to inquire about and seek clarification of any question or other item in the RFP (by June 1, 2019) that Proposer does not fully understand or that Proposer reasonably believes is susceptible to more than one interpretation; and
5. A statement that the Proposer's organization or an agent of the Proposer's organization has arrived at the prices and discounts without consultation, communication or agreement with any other respondent or with any competitor for the purpose of restricting competition; and
6. A statement that it has not paid, and shall not pay, any bonus, commission, fee or gratuity to any employee or official of the Agency for the purpose of obtaining any Contract or award issued by the Agency. The Proposer shall further warrant that no officer or employee of the Agency has any direct or indirect financial or personally beneficial interest in the subject matter of the awarded Contract, and no obligation or contract for future award of compensation has been proposed as an inducement or consideration for making the awarded Contract. Subsequent discovery by the Agency of non-compliance with these provisions shall constitute sufficient cause for immediate termination of all outstanding Contracts; and
7. A statement that no attempt has been made or shall be made by the Proposer or by any agent of the Proposer to induce any other person or firm to submit or not submit an Proposal for the purpose of restricting competition; and
8. A statement that the individual signing the Proposal is authorized to make decisions as to the prices quoted and that she/he has not participated and will not participate in any action contrary to the RFP; and
9. A statement that (*Proposer's Name*) hereby represents and warrants it has analyzed the Agency's RFP, understands the Agency's requirements and agrees to be bound by the terms and conditions of the Proposal for 180 days after the submission deadline, or longer if the Proposal is included in a Contract with the Agency; and
10. A statement that (*Proposer's Name*) is an expert in the types of services, functions and tasks proposed in the RFP and understands that the Agency shall rely on this expertise; and
11. A statement that (*Proposer's Name*) understands the evaluation and selection of a Contractor will be based on the information submitted in the Proposal plus references. Any required presentations, on-site visits, or oral interviews are optional at the discretion of the Agency.

Tab 3 - RFP Cover Sheet

Tab 4 - Mandatory Contract Performance Requirements Provide a point-by-point response to each requirement specified in Section 1 of the RFP. Responses to requirements must be in the same sequence as they appear in the RFP.

Tab 5 - Mandatory Proposer Qualification and Administrative Documentation Requirements Provide the information and documentation specified in Section 4 of this RFP. Responses to requirements must be in the same sequence and numbered as they appear in the RFP. Include all required documentation.

Tab 6 - Response to General Requirements: Provide a point-by-point response to each requirement specified in Section 5 of the RFP. Responses to requirements must be in the same sequence and numbered as they appear in the RFP.

Tab 7 - Response to Technical Requirements: Provide a point-by-point response to each requirement specified in Section 6 of the RFP. Responses to requirements must be in the same sequence and numbered as they appear in the RFP.

Tab 8 - Contract Terms and Conditions: The attachment provided with the RFP represents the Contract terms and conditions which the Agency expects to execute with each successful Proposer(s). The Proposer must be prepared to respond to the provisions contained in this document.

The Proposer may not submit its own contract document as a substitute for these terms and conditions.

Under Separate Cover - Cost Proposal: Provide cost information as directed in Section 7. Include all costs for furnishing service(s) included in this Proposal. Failure to provide any requested information in the prescribed format may result in disqualification of the Proposal. No mention of the Cost Proposal is permissible in the response to any other section of the RFP.

2.6 RFP_PRESENTATIONS; DEMONSTRATIONS

Top scoring Proposer(s) based on an evaluation of the written Proposal may be required to participate in a presentation and/or Demonstration to support and clarify Proposal(s), if requested by the Agency. The presentations and/or Demonstrations will be scheduled and held after receipt of the Proposals to provide an opportunity for the Proposer to clarify its Proposal and for the evaluation committee to ask questions. Proposer representative(s) attending the oral presentation or demonstration shall be technically qualified to respond to questions related to the Proposal and its components. The Agency will furnish specific details concerning the presentations or demonstrations and any required materials at the time it notifies Proposers of the presentation schedule.

The Agency shall make every reasonable attempt to schedule each presentation at a time and location agreeable to the Proposer. The Agency requires that those individuals designated by the Proposer as Key Personnel attend the presentation in person. Failure of a Proposer to interview or permit a site visit on the date scheduled may result in rejection of its Proposal.

2.7 RFP_MULTIPLE PROPOSALS

Multiple Proposals from a Proposer will be permissible; however, each Proposal must conform fully to the requirements for proposal submission. Each such Proposal must be submitted separately and clearly labeled as Proposal #1, Proposal #2, etc. on each page included in the response.

2.8 RFP_WITHDRAWAL OF PROPOSALS

The Proposal shall be irrevocable until Contract award unless the Proposal is withdrawn. A Proposer may withdraw a Proposal in writing at any time up to the Proposal closing date and time or upon expiration of 180 days after the due date and time if received by Ronda Brown. To accomplish this, the written request must be signed by an authorized representative of the Proposer and submitted to Ronda Brown. If a previously submitted Proposal is withdrawn before the Proposal due date and time, the Proposer may submit another Proposal at any time up to the Proposal closing date and time.

2.9 RFP_LATE PROPOSALS

Any responses received after the hour specified in Section 2.4 SUBMITTING THE PROPOSAL shall not be reviewed.

3 RFP_PROPOSAL SELECTION AND AWARD PROCESS

This section explains how proposals will be accepted, evaluated, and how the Agency will engage in negotiations if it opts to do so.

3.1 RFP_PRELIMINARY EVALUATION

All Proposals will be reviewed initially to determine if Proposal submission requirements are met. Failure to meet a Proposal submission requirement may result in the rejection of the Proposal.

In the event there is an individual mandatory requirement that no Proposer is able to meet, the Agency reserves the right to eliminate that individual mandatory requirement; in such case, the Agency shall continue the evaluation of Proposals and select the Proposal that most closely meets the remaining requirements specified in the RFP.

3.2 RFP_EVALUATION COMMITTEE

An evaluation committee for this RFP shall consist of individuals who, in the Agency's sole judgment, possess specific knowledge and skills essential to the RFP evaluation. The evaluation committee participates fully in the evaluation process, including reviewing and scoring Proposals. Subject Matter Experts (SMEs) may be used to provide additional expertise (e.g. technical and functional subject matter expertise, administrative and procurement knowledge) to the evaluation committee. SMEs are a non-scoring individuals or ad/hoc group that serves only as technical advisors to the evaluation committee.

3.3 RFP_ACCEPTED PROPOSALS

An evaluation committee will evaluate and score all accepted Proposals against predetermined criteria. A uniform selection process, as outlined in this section, will be used to evaluate all Proposals using a point system. Proposers are advised that responses to requirements should clearly and completely describe how its services and products will meet those requirements. Failure to demonstrate in the Proposal response that the Proposer can meet the requirements stated may cause the rejection of the Proposal.

The committee may review references, request presentations and demonstrations, and use those results in scoring the Proposals. Evaluation and selection of the Contractor, as well as any subsequent negotiations, will be based on the information submitted in the Proposals, references, requested presentations, and product and service demonstrations.

The Agency reserves the right to obtain additional information concerning any Proposer or Subcontractor associated with or named in the response to this RFP and to consider this information in evaluating the Proposer's Proposal.

3.4 RFP_EVALUATION CRITERIA

Accepted Proposals shall be reviewed by the evaluation committee and scored against the stated criteria. Proposers shall not contact any member of an evaluation committee. Evaluation points given by each evaluator shall be summed and divided by the number of evaluators to compute an average score for each Proposal. Cost Proposal information shall not be available to the Evaluation Committee during the requirements evaluation phase.

Proposals will be scored in the following areas.

RFP SECTION AND DESCRIPTION	POINTS AVAILABLE	WEIGHT % (ROUNDED)
GENERAL REQUIREMENTS	20	35%
TECHNICAL REQUIREMENTS	200	35%
COST PROPOSAL	20	30%
TOTAL	240	100%

The points stated above are the maximum amount awarded for each category.

The results of oral presentations or demonstrations (if required) shall be used to clarify and substantiate information in the written Proposals and may be considered when scoring the responses to the general and technical requirements in the RFP. Reference checks will be used to substantiate information in the written proposals. The reference check results may be considered when scoring the responses to the general and technical requirements in the RFP.

General, Technical, and Cost Score Total

The final average points received from a Proposal's General Requirements and Technical Requirements will be subtotaled and added to the final Cost Proposal score. In the event of a best and final, only those Proposers in the best and final process will be included in the calculation.

The final total score (General, Technical, and Cost) will be weighted per RFP Section 3.4.

3.5 RFP_SUPPLIER DIVERSITY

Proposals from certified Minority Business Enterprises (MBE) or Disabled Veteran-owned Businesses (DVB) may have points weighted by a factor of 1.00 to 1.05 to provide up to a five percent (5%) preference to these businesses (s. 16.75 (3m), Wis. Stats., 2001-02).

3.5.1 RFP_MINORITY-OWNED BUSINESS ENTERPRISE

Minority-owned business enterprises (MBEs) are certified by the Wisconsin Department of Administration. This program can be found at: <http://www.doa.wi.gov/Divisions/Enterprise-Operations/Supplier-Diversity-Program>.

A listing of certified MBEs, as well as the services and commodities they provide, is available at: <https://wisdp.wi.gov/search.aspx>.

3.5.2 RFP_VETERAN-OWNED BUSINESS

The Agency Bureau of Procurement encourages the participation of veteran-owned businesses (VBs) in the statewide purchasing program by inviting VBs to actively solicit public purchasing business and by reducing undue impediments to such participation. VBs are certified by the Department of Veterans Affairs (DVA). Applicants shall complete a Veteran-owned Business Request for Certification form (WDVA 1037). Contact the DVA at: <http://dva.Agency.wi.us>. There is no price preference for certified VBs that compete for Agency Contracts.

3.5.3 RFP_DISABLED VETERAN-OWNED BUSINESS

Disabled veteran-owned businesses (DVBs) are certified by the Wisconsin Department of Administration. This program can be found at: <http://www.doa.wi.gov/Divisions/Enterprise-Operations/Supplier-Diversity-Program>.

The Proposer/Contractor shall furnish appropriate quarterly information about its efforts, including the identities of such businesses certified by the Supplier Diversity Program and their Contract amount.

A listing of certified DVBs, as well as the services and commodities they provide, is available at: <https://wisdp.wi.gov/search.aspx>.

3.5.4 RFP_WOMAN-OWNED BUSINESS ENTERPRISE

Woman-owned business enterprises (WBEs) are certified by the Wisconsin Department of Administration. This program can be found at: <http://www.doa.wi.gov/Divisions/Enterprise-Operations/Supplier-Diversity-Program>.

Agency certified WBEs are able to provide both governmental entities and private companies with a credible recognition of the business' ownership. The WBE certification may serve as an additional marketing tool when seeking contract opportunities with entities that place a value on having a diverse supplier base. There is no price preference for certified WBEs that compete for Agency Contracts.

A listing of certified WBEs, as well as the services and commodities they provide, is available at: <https://wisdp.wi.gov/search.aspx>.

3.6 RFP_RIGHT TO REJECT PROPOSALS

The Agency reserves the right to reject any and all proposals.

3.7 RFP_AWARD AND FINAL OFFERS

The Agency shall compile the final scores for each responsive Proposal. Multiple awards will be granted in one of two ways. The awards may be granted to the highest scoring responsive and responsible Proposer(s).

Alternatively, the highest scoring Proposer(s) may be requested to submit best and final offers (BAFO). If a BAFO is requested by the Agency and submitted by Proposer(s), they shall be evaluated against the stated criteria, scored and ranked by the evaluation committee. Multiple awards then may be granted to the highest scoring Proposer(s). However, Proposers shall not expect that the Agency shall request a best and final offer.

3.8 RFP_CONTRACT NEGOTIATION

The Agency intends to enter into Contract negotiations with the Proposer(s) who has been determined by the evaluation committee to be the highest scoring Proposer(s), calculated as outlined in Section 3. The Agency may negotiate the terms of the Contract, including the price, with the highest scoring Proposer(s) prior to entering into a Contract. If the Contract negotiations cannot be concluded successfully with the highest scoring Proposer(s), the Agency may negotiate a Contract with the next highest scoring Proposer.

The contractual terms and conditions in Agency Terms and Conditions, of the RFP are part of the Contract between a Contractor and the Agency. These terms and conditions are not all-inclusive, and the Agency reserves the right to incorporate additional provisions in the Contract.

3.9 RFP_CONTRACT NEGOTIATIONS IMPASSE

If a Contract between the Agency and the successful Proposer cannot be executed by both parties within sixty (60) Days after the notice of intent to award the Contract (or the conclusion of an appeal of the award under Ch. ADMIN 10, Wis. Adm. Code, whichever is later), the Agency reserves the right to unilaterally reject the Proposer's Proposal and proceed to award the Contract to the next highest scoring Proposer.

3.10 RFP_NOTIFICATION OF INTENT TO AWARD

Any Proposer who responds with a Proposal shall be notified in writing of the Agency's intent to award the contract(s) resulting from the RFP.

After the Intent to Award is issued, copies of all Proposals shall be available for public inspection from 8:00 a.m. to 4:00 p.m. at St. Croix County Services Center, 1752 Dorset Lane, New Richmond WI 54017, under the supervision of Agency staff. Proposers shall schedule a specific appointment with Ronda Brown via e-mail ronda.brown@sccwi.gov to ensure that space is available for the review.

3.11 RFP_APEALS PROCESS

A Notice of Intent to protest a Proposal award and the actual protest shall be made in writing to the head of the Agency (or his or her designee) as set forth below. The protest procedure applies to only those requests for Proposals for services that are over \$50,000. The protest shall be as specific as possible and should identify statutes and Wisconsin Administrative Code provisions that are alleged to have been violated.

The Notice of Intent to Protest shall be filed with the individual listed below and received by the head of the Agency Head (or designee) no later than five (5) business days after the Notice of Intent to Award is issued.

The actual Protest also shall be filed with the individual listed below and shall be received by the Agency (or designee) within ten (10) business days after the Notice of Intent to Award is issued.

US MAIL ADDRESS	DELIVERY ADDRESS
KEN WITT	KEN WITT
ST CROIX COUNTY GOVERNMENT CENTER	ST CROIX COUNTY GOVERNMENT CENTER
1101 CARMICHAEL ROAD	1101 CARMICHAEL ROAD
MAIN LEVEL	MAIN LEVEL
HUDSON WI 54016	HUDSON WI 54016

4 RFP_MANDATORY PROPOSAL REQUIREMENTS

This section is not scored. The following requirements are **mandatory** and the Proposer shall satisfy them at no additional cost to the Agency.

Respond to this section and provide any required documentation as indicated. Responses to each requirement must follow the instructions. No explanation is required when the Proposer cannot certify a statement is true, as non-compliance with any of the following requirements will result in Proposal rejection and remove that Proposal from further consideration.

Failure of a Proposer to meet the mandatory requirements shall result in rejection of the Proposer's Proposal. In the event there is an individual mandatory requirement that no Proposer is able to meet, the Agency reserves the right to eliminate that individual mandatory requirement; in such case, the Agency shall continue the evaluation of Proposals and select the Proposal that most closely meets the remaining requirements specified in the RFP.

4.1 RFP_SERVICES PERFORMED WITHIN THE U.S.

Pursuant to s. 16.705(1r), Wis. Stats., services must be performed within the United States. The inability to perform all services in the United States shall be grounds for disqualifying your proposal. Countries party to the World Trade Agreement may not be subject to this requirement.

4.2 RFP_DEBARMENT

At the time of Proposal submission, Proposer shall not be suspended or debarred from doing business with the federal government as listed in the Excluded Parties List System (EPLS) maintained by the General Services Administration (<https://www.epls.gov/>).

4.3 RFP_PROPOSER REFERENCES

Proposers shall provide a minimum of three (3) references for organizations similar in size and scope to the Agency with whom your company has provided (services contained within RFP) within the last five (5) years. Proposers are required to include government customers with similar service scope, size, and complexity.

For each reference, provide the following:

- Contact Name and Title
- Project start/end dates
- Project description (i.e., scope, staff, technical environment)
- Outcome of project (i.e., on time, on budget, performance measures met)

The Evaluation Committee will determine which, if any, references are contacted. The results of any reference checks may be used when scoring the proposal. The Agency will use reference information to validate information provided in response to the RFP; therefore, the relevancy of the experience, compatibility of the experience to this RFP, and the performance record of the experience is essential. The Agency reserves the right to verify all submissions and perform further background checks of experience and performance. The Agency or Evaluation Committee may contact one or more references that have been provided by the Proposer or other sources that may not have been named by the Proposer, but can assist in determining performance.

4.4 RFP_CONTRACT TERMINATION HISTORY

The Proposer shall indicate if it had a contract terminated for cause in the last five (5) years and, if so, describe such incident(s).

Submit full details of the terms for termination for cause including the other party's name, address, and phone number. Proposer shall present its position on the matter. The Agency will review the facts and may, at its sole discretion, reject the Proposal on the grounds of the experience.

If no such termination for default has been experienced by the Proposer in the past five (5) years, so indicate.

4.5 RFP_SUBCONTRACTORS

The Agency reserves the right to review Subcontractors. The Agency shall not have a contractual relationship with the Subcontractors for any services provided under this Contract (existing contracts between the Agency and any potential Subcontractor do not apply). Proposed Subcontractors may be required to participate in the oral presentations and/or demonstrations.

For all Subcontractors, Proposer shall: 1) Name the Subcontractor; 2) Explain its relationship with the Subcontractor; 3) Describe the role the Subcontractor will play; and 4) Provide the name and a description of Subcontractor(s) relevant qualifications and capabilities.

5 RFP_GENERAL REQUIREMENTS (20 POINTS)

This Section is scored. The Agency requires the Contractor to have the proven ability to deliver the types of services sought in this RFP. The purpose of this section is to provide the Agency with a basis for determining a Proposer's capability to undertake an engagement of this size and scope.

Unless requested to do so, Proposer shall not direct the reader to a website or any other source outside of the applicable RFP section as part of its response to the requirement or question unless it is a map, diagram or schematic included in another section within the RFP.

Responses that merely restate the requirement or only indicate an acknowledgement of understanding and a willingness to comply will be considered unresponsive.

5.1 RFP_ORGANIZATIONAL CAPABILITIES

1. Provide your organization or agency structure.
2. Provide the name(s) and contact information of principal officers/managers, years of experience of each WHEAP Service business, agency, organization, and/or company and the number of years with current establishment.
3. Describe your agency's qualifications as they relate to delivering WHEAP services.
4. Describe your agency's experience in providing WHEAP services.
5. Provide any data available demonstrating your ability to achieve the Agency's desired outcomes.

5.2 RFP_STAFF QUALIFICATIONS

1. Describe your staffing pattern including the number of Full Time Equivalent positions necessary to provide the service. Proposal shall provide an organizational chart(s) that

indicates positions proposed to implement this project and copies of position descriptions. Proposal shall provide resumes, qualification and any completed certification of Management Staff, Supervisory Staff, and Site Representative to be assigned to this contract.

2. Include a functional description of the responsibilities of all relevant positions that are involved in this project.
3. Describe the qualifications of all personnel who are to be assigned or are proposed for this project. Information about education, training, experience and certifications should be included. Proposal shall provide two professional references for employees assigned or proposed to the project.
4. Describe how you intend to meet the needs of a culturally diverse population.
5. Indicate the amount of startup time necessary to fully implement these services.

6 RFP_TECHNICAL REQUIREMENTS (200 POINTS)

This Section is scored. The Agency requires the Contractor to have the proven ability to deliver the types of services sought in this RFP. The purpose of this section is to provide the Agency with a basis for determining a Proposer's capability to undertake engagement of various size and scope.

Unless requested to do so, Proposer shall not direct the reader to a website or any other source outside of the applicable RFP section as part of its response to the requirement or question unless it is a map, diagram or schematic included in another section within the RFP.

Responses that merely restate the requirement or only indicate an acknowledgement of understanding and a willingness to comply will be considered unresponsive.

6.1 Service Plan Requirements

The Proposal shall include the following elements and activities in their Service Plan proposal. Guidelines listed are considered the minimum requirements.

1. Location

The Contractor shall operate a facility that is open to the public within St. Croix County. The Contractor shall be responsible to ensure the property meets all ADA, zoning and occupancy requirements and obtain any and all occupancy permits. The Contractor should make every effort to have sufficient parking available.

2. Hours of Operations

At minimum, the Contractor's agency shall provide services from 8:00 am to 4:30 pm. During peak times the agency site shall provide evening hours at least one (1) day per week. Hours of operation need to be clearly posted at the agency.

3. Days of Operation

Customers shall have access to services Monday through Friday. Weekend hours are optional. A list of major holiday/closure dates must be provided to the county prior to each season and posted at the agency.

4. Severe Weather Closure Policy

The Contractor shall have a written severe weather closure policy. This policy shall be incorporated into St. Croix County's Coordination Plan.

5. Emergency Services

During the heating season, assistance must be available 24 hours per day, 7 days per week for emergency furnace ("no heat") referrals. The procedure for handling emergency services shall be incorporated into St. Croix County's Furnace Contact Information Form and Crisis Plan.

6. Phone System

The Contractor shall establish and publicize a local or toll-free telephone number that persons can call year-round for general HE+ information. Criteria is subject to the WHEAP Operations Manual.

The Contractor shall have the ability to receive calls and messages 24 hours per day, seven (7) days per week. The agency shall retrieve and return calls in the order received within three (3) business days. The outgoing message shall include, but is not limited to business name, location, hours of operation (including closures), emergency/after-hours contact information, and application procedures. The agency shall provide a message script annually, prior to the start of the energy season.

7. Access

The Contractor shall ensure that all applicants have meaningful and equal access to benefits and services. This includes, but is not limited to, persons with limited English proficiency (LEP) and those who are disabled or impaired.

8. Application Intake

The Contractor shall provide access for any St. Croix County resident to file an application for WHEAP. Any household within St. Croix County is eligible to apply for benefits and services at the location(s) of their choosing. Applications shall be processed within the guidelines set forth in the WHEAP Operations Manual.

- **Walk-in Applicants**

- The Contractor may determine the method and manner walk-in applicants are processed. Hours of operation and application procedures shall be posted at the site.

- **Phone Applications**

The Contractor shall offer phone applications. Customers requesting a phone application shall have an appointment assigned within 3 business days of the request.

- Home Visits
The Contractor shall offer home visits. Customers shall have an appointment assigned within three (3) business days of the request.
- Outreach Sites
The Contractor shall develop a plan to reach targeted households. In addition, a schedule of alternative application sites and information points should be developed. St. Croix County requires monthly reporting of Outreach activities.
- Early Application
The Contractor shall accept early applications during the current program year for the upcoming heating year, regardless of the contract status of the future season. The early application schedule is determined by DEHCR.
- Crisis
The Contractor, along with the St. Croix County, determines the crisis criteria for the Crisis Plan each year. The Crisis Plan shall be approved by St. Croix County before submitting it to DEHCR.

The Contractor shall be required to administer or provide all services designated in the Crisis Plan. These services have included, but are not limited to, application processing, enrollment in an assistance plan, assisting in setting up a utility payment plan, providing workshops, or case management. St. Croix County requires monthly reporting of Crisis services.

9. File Retention

The Contractor shall maintain all required application documents for five (5) years after the completion of the contract year. The Contractor is required to maintain records in a confidential manner in accordance with Wisconsin State Statutes and any other applicable state or federal laws. The Contractor shall demonstrate compliance with all WHEAP guidelines for handling sensitive data as listed in the WHEAP Operations Manual.

10. Quality Assurance and Monitoring

The Contractor shall be responsible to ensure accurate and timely processing of all applications taken within the County. The Contractor shall provide a Quality Assurance (QA)/Monitoring plan. St. Croix County requires monthly reporting and will conduct an annual review of cases.

11. Fair Hearings

Customers have the right to request a fair hearing about benefit determination made by the Contractor. The Contractor is required to respond to fair hearing requests for determinations made at their application site. St. Croix County will be notified by the State Division of Hearings and Appeals of any hearing requests. Those requests shall be forwarded via email to the Contractor to provide case records and attend the hearing on behalf of the County. All fair hearing notifications shall be acknowledged via email within 24 hours (One (1) business day).

12. Customer Complaints

The Contractor shall respond to customer complaints in a timely and professional manner. The County or State may request additional information regarding an application or customer follow-up. The Contractor shall designate a representative to receive and track complaints. The designee shall respond or acknowledge the request within the same business day.

13. Training

The Contractor shall ensure that all staff are trained and demonstrate proficiency in accurately applying WHEAP policies and procedures. New employees are required to attend the DEHCR administered “New Worker” basic intake training.

14. Committee Participation

The Contractor shall participate in the following committees/activities:

- State and County reviews
- Any core workgroup(s)
- State meetings and trainings
- Other State and County meetings and committees as needed

15. Site Representative

The Contractor must identify a Coordinator for each site(s). The person will be the main contact person for inquiries and site information. In addition, a quality assurance person shall be designated. This person may or may not be the Coordinator.

Participation in core workgroups, committees and all training activities is required of the Coordinator. In addition, the Coordinator will have input in process improvement activities and developing annual state plans. Contractors that oversee more than one (1) site may also include a program manager as part of these activities.

16. Human Resources

The Contractor shall have a designated Human Resources person or department to maintain personnel files for employees that meet the requirements of state and/or federal regulations concerning personnel. These records should include training, Criteria-based Job Descriptions, Annual Performance Evaluations and Reviews, Competency Testing and Documentation, driver record abstracts, and caregiver background checks.

A complete staffing roster shall be submitted prior to the start of the program year. Any changes in staff should be reported to St. Croix County. Background check need to be provided to St. Croix County along with the staffing roster for new staff.

The Contractor shall ensure that, at a minimum, the following contractual requirements be part of the internal Policy and Procedure for Human Resources in regard to Caregiver Background Checks.

- Caregiver background checks (CBCs) need to be processed for all employees (direct, indirect and contractual) associated with the contract no more than 90 days prior to the date of hire. CBCs should be processed at intervals no greater than every four (4) years thereafter. Employees that are on seasonal layoff, medical leave or otherwise not actively employed for more than 90 days shall be treated as new employees and have a CBC processed prior to their return to work.
- Hiring practices related to the contract are subject to the Wisconsin Caregiver Law and St. Croix County regulations. No employee with a barrable offense or substantially related offense may provide any services related to the contract.
- Employees are required to report any convictions or new arrests to the Contractor within 24 hours of the event.
- The Contractor shall be responsible to ensure that all employees for this program meet the criteria established under the Wisconsin Caregiver law and that all documentation is present prior to the employee beginning work. St. Croix County has the right to review any caregiver background checks and disallow any employee to provide services for this program.

17. Staffing/Personnel

Each site shall have a Coordinator to oversee site operations and be the primary site contact. Each site shall have a Quality Assurance person to oversee Quality Assurance and monitoring activities. The staffing plan shall include the number of staff and the number of daily and weekly staff hours needed to provide effective customer service. Staff may be full or part time based on the Contractor's needs. All staff must meet the Wisconsin Caregiver Background Check (CBC) criteria. A roster of all direct and indirect staff (including compliance with CBC, Driving and training requirements) is required to be submitted prior to the start of the program year. All staff submissions are subject to St. Croix County review and approval.

18. Fiscal Operations and Invoicing

Billing is based on actual expenses. The Contractor shall provide accurate monthly billing of all activities by funding source in accordance with the approved annual budget and the WHEAP Operations Manual. Billing statements and reports are due no later than the 15 business day of the month following the service delivery month. Actual expenses are required to be reported in each funding source for each month of the contract, even if expenses exceed the contract amount. In addition, the agency shall provide:

- A monthly report of outreach and crisis activities

- A monthly report of customers served

19. Marketing Materials

All marketing materials must contain State, County and Weatherization Agency logos. All posted materials are subject to State and County Approval.

20. Website

The Contractor shall have a public website. Information regarding the St. Croix County WHEAP program shall be accessible from the Contractor's home page. The WHEAP page shall include, but is not limited to, application requirements, application sites and hours of operations, and emergency/afterhours information. In addition, the site should offer links to state WHEAP information and all St. Croix County application site(s). Website content is subject to State and County approval.

7 RFP_COST PROPOSAL (20 POINTS)

The Cost Proposal shall be submitted separately from the RFP response.

The Proposer provides a budget that is accurate, clear, and in sufficient detail. The budget effectively and efficiently supports the level of service, staffing, and the proposed program. The Proposer's proposed cost to deliver the service, compared to other Proposers, reflects the quality and quantity of service to be provided.

7.1 RFP_COST WORKSHEETS

Completion of the Cost Proposal is **mandatory**. Prices submitted shall be in U.S. dollars.

It is the sole responsibility of the Proposer to ensure that all mathematical calculations are correct and that the total cost worksheet proved accurately reflects costs. Estimated proposal prices are not acceptable.

All pricing must remain firm for the initial term of the contract. Exceptions to this would include increases in discounts and/or reductions in pricing.

7.2 RFP_CONSIDERATION OF ALL INHERENT COSTS

Proposal prices shall take into consideration all inherent costs of providing the services described in the RFP.

7.3 RFP_FIXED PRICING

All Proposal prices shall remain firm for the initial contract term.

Contractor may request a price increase in writing to the Agency no later than sixty (60) days prior to the beginning of the next contract period and prior to 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. Requests for a price increase are limited to one request per renewal term.

7.4 RFP_PRICE CLARIFICATION

The Agency reserves the right to clarify any pricing discrepancies related to assumptions on the part of the Proposers.

8 RFP_SPECIAL TERMS AND CONDITIONS

Agree to the standard St. Croix County – Department of Health and Human Services - General Terms and Conditions of Purchase, the attachment provided with the RFP.

9 RFP_LIST OF REQUIRED FORMS AND DOCUMENTS

The following forms and documents shall be completed and returned with the Proposal response:

- Tab 1- Table of Contents
- Tab 2 – Transmittal Letter
- Tab 3 – RFP Cover Sheet
- Tab 4 – Mandatory Contract Performance Requirements
- Tab 5 - Mandatory Proposer Qualification and Administrative Documentation Requirements
- Tab 6 - Response to General Requirements
- Tab 7 - Response to Technical Requirements
- Tab 8 - Contract Terms and Conditions (attachment St. Croix County – Department of Health and Human Services - General Terms and Conditions of Purchase)
- Cost Proposal
- Cost Worksheets