



INSTRUCTIONS TO BIDDERS

Revised: 30 July 2019

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The Air-Conditioning, Heating, and Refrigeration Institute, Inc. (AHRI) invites all prospective bidders to submit proposals on AHRI research projects released for bid. Details on the background, objectives, scope, and requirements of the work to be performed are listed in the work statements for each solicited project.

Proposal Submission Date

Proposals must arrive at AHRI by the respective due dates indicated in the solicitation and must be responsive to the requirements outlined in the project's work statement. Proposals must be submitted in electronic form. Electronic submission must be in either Adobe PDF or MS Word file formats with files size no larger than 5 MB. Proposals shall be sent to:

Electronic Submissions: mshurtleff@ahrinet.org

Contact for Technical Questions Concerning the Scope of Work:

Xudong Wang
Tel: (703) 600-0305
Email: xwang@ahrinet.org

Work for Hire

AHRI research projects are “work made for hire” under the Copyright Act. AHRI shall be deemed the sole and exclusive owner of all rights, title, and interest therein, including all copyright and proprietary rights relating thereto. The Contractor retains no copyright or other intellectual property interest under this Agreement. Results of this work will be held confidential to AHRI. Outside publication is prohibited unless specifically approved by AHRI.

Proposals

Bidders shall prepare and submit Technical and Cost proposals as two separate documents.

Technical Proposals

The technical proposal should succinctly discuss how the objective(s) and identified tasks/subtasks of the project will be accomplished by the bidder. The tasks/subtasks must be numbered to correspond to those in the work statement. Tasks/subtasks that are omitted, added or altered from the original tasks in the work statement must be clearly identified. The technical proposal should contain references or other background to support the approach presented in the proposal. A detailed schedule on how/when the proposed work will be performed should also be included in the technical proposal.

If other entities (e.g., subcontractors, suppliers, etc.) play a key role in undertaking the work, these entities are to be identified. Their level of support to the project should be described along with other



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pertinent information to clarify the research team management relationships.

The work statement may specify how the work is to be carried out or which methods and materials should be used. However, proposals may offer alternative methods and materials for the work that will produce the same or improved results.

If optional work is proposed, the bidder shall clearly indicate the optional effort is being proposed as “add-on” work to be performed at an incremental price above the base cost for the work solicited and is clearly delineated as such in the cost proposal. AHRI reserves the right to select the underlying solicited work without accepting the optional work.

Technical proposals which contain clear, concise, sound, and original thought will be highly regarded in the evaluation process.

Cost Proposals

Costs are to be broken down by task into the following cost categories: salaries and fringe benefits, supplies and materials, equipment, subcontracts, travel, other direct costs, and indirect costs. Bidder shall clearly describe what is included in the “other direct costs” and “indirect costs” categories. All equipment purchase requirements and use of subcontractors in this work shall be clearly indicated. If optional add on work is proposal, the bidder shall delineate the incremental costs as an “adder” to the base effort cost.

Due to reduced auditing and accounting requirements, fixed-price contracts are preferred. Bidders should clearly indicate if they are proposing a fixed-price proposal or a cost-reimbursement (with a maximum cost) bid.

Proposal Evaluation

Proposals are evaluated by AHRI staff and volunteer experts from AHRI member companies serving on a project monitoring subcommittee for each specific project. Technical Merit, Cost, and Prior Performance are key factors in the award decision. Technical Merit is the most important factor in the rating of proposals. Proposal will be evaluated in the following five areas:

- Understanding of the problem,
- Approach to solving the problem,
- Probability of success,
- Pertinent qualifications and experience of key personnel, and
- Quality and availability of pertinent facilities to perform the work.

Bidders may be asked to make an oral presentation via web/telephone conference at a mutually convenient time. However, AHRI will make every attempt to make selections based on written proposals alone. It is anticipated that AHRI will make final contractor selection within 30 days of the respective proposal due dates. Work is expected to begin as soon as possible after the selection



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is finalized and the contract executed.

Other Information

Proposals are welcomed from all qualified candidates. Each bidder will bear the cost of preparing their own proposal.

Unnecessarily elaborate proposals beyond that necessary to present a complete and effective response to this solicitation is strongly discouraged.

In order to facilitate the receipt, processing, distribution and evaluation of proposals, the following are strongly suggested:

- Technical proposal and cost proposal must be to separate documents
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- Proposals must be in either Adobe PDF or MC Word file format. File sizes must be below 5 MB.
- Limit biographies/resumes/curriculum vitae to the relevant 1 or 2 pages each.
- List only publications applicable to the subject of the research.

AHRI will acknowledge receipt of proposals by email.

Normal business procedures will be observed in handling proposal materials. Proposals should not contain proprietary or other information requiring restricted or special handling of documents.

Further instructions for bidders are contained in the individual work statement. If more information concerning either a project's technical details, or on proposal submission requirements is desired, it can be obtained by contacting the appropriate AHRI staff person.

Limitation on Solicitation

This solicitation does not commit AHRI to award a contract, pay any costs incurred in preparing a proposal, or to procure or contract for services or supplies. AHRI reserves the right to accept any or all proposals received, or to cancel in part or its entirety the solicitation prior to the signing of a contract agreement, when it is in AHRI's best interest. AHRI reserves the right to negotiate with all qualified sources.