

**HOUSING AUTHORITY OF THE CITY OF MILWAUKEE
809 North Broadway
Milwaukee, Wisconsin 53202**

**REQUEST FOR SERVICES PRICING
QUOTE #9706 – Water Treatment Today's Date: 08/29/2022**

This DOES NOT represent a commitment to buy.
Any ACTUAL order resulting from this solicitation will be confirmed by a
Housing Authority Purchase Order

**ALL SERVICES REQUIRE COMMERCIAL AND PUBLIC LIABILITY INSURANCE BE ON FILE IN THE
PURCHASING UNIT OF THE HOUSING AUTHORITY OF THE CITY OF MILWAUKEE BEFORE
COMMENCING WITH ANY WORK.**

Description

Provide proper water treatment to for the Housing Authority of the City of Milwaukee at the various housing developments (list attached).

If you need to schedule a walkthrough, contact maintenance operations at 414-289-2931.

Water treatment will be as follows:

Provide quarterly testing on all facilities closed water loops.

Provide all cooling water treatment and services to Highland Gardens, Cherry Court, Lapham Park and Convent Hill.

Provide service to cooling tower systems every 6 to 8 weeks.

Provide annual water filter changing on all facilities listed and contractor to provide filter media.

Provide all water treatment under a nitrite-based program at annual rate of 500 gallons make-up water per facility. Contractor to provide all Chemicals Cooling and Closed Loops.

Provide all micro-bio dip slides for weekly testing on all cooling tower programs.

Provide 18 annual laboratory tests (1 annual per building) – 82point water analyses.

Add needed water chemistry based on operation testing.

Nitrite and polymer-based treatment program.

Provide all chemicals and treatment handling issues related to the treatment program.

Water quality as per boiler manufacturer recommendations—See attached.

Testing solar systems at Olga Village, Becher Court Development, and Westlawn maintenance facility, to be completed between October 1st and October 15th, results to be submitted within 20 days after testing.

Testing ground loop system at Olga Village and Westlawn east mid-rises, to be completed between

October 1st and October 15th, results to be submitted within 20 days after testing.

Contractor to provide all services to the Housing Authority with no Sub Contractor agreement and/or selling services provided under this contract. Must provide full inclusive service.

Service- provide all labor to complete testing, sampling, chemical additions, filter changes, chemicals, cleaning, systems start up, and inspections as needed. Report the findings of the water testing within 30 days.

Equipment- provide all wear-parts to chemical feed equipment, pumps, gaskets, water meters and pot feeders as provided. All cooling tower probes and sensors are covered under contract. There are approximately 200 systems filters--10 micron or better—to be changed annually (2 times per year).

Chemicals- All chemical liability is the responsibility of the contractor. All prices to include freight, storage, handling, and shipping or any other costs.

Reporting- Annual systems review completed in January of each year with management. Scheduled time adjusted by HACM for calendar year. All service reports e-mailed to service engineer.

All products used in your water treatment program must meet all E.P.A. and local sanitary district guidelines.

This contract will be effective September 1, 2022 through August 31, 2023, with the option to extend for an additional four one-year terms upon mutual consent of both parties.

TOTAL ANNUAL COST: \$ _____

You must provide a Product Sheets and Material Safety Data Sheet with your bid.

The Purchasing Division may determine the award of a tie bid using a method of chance. Tie bids are defined as all things being equal, such as price, quality, services, etc.

ATTACHMENTS:

Water Treatment Facility List

Boiler Manufacturer Recommendations

Insurance Requirements

Table 5.1

Section 3 Policy/Compliance Forms Package. If you have any questions regarding the Section 3 Plan/forms, please contact Konita Jude at (414) 286-2940 or Kpjude@hacm.org

Contact Person: Stacey Shaw

Phone: 414-286-2942

Fax: 414-286-5502

PLEASE SIGN BELOW AND FAX TO: 414-286-5502,

or email to sshaw@hacm.org

BY 12:00 PM on September 12th, 2022

Signature

Date

Phone

Fax

Company Name & Address

FACILITY LIST

| Facility | Address |
|---|--|
| Arlington Court | 1633 N Arlington Place (53202) Manager-Cheryl Strand (414)286-8850 |
| Becher Court | 1802 W Becher Street (53215) Manager-Derrick Braggs (414)286-8851 |
| Cherry Court | 1525 N 24 Street (53205) Manager-Jessica Sims (414)286-8835 |
| College Court | 3334 W Highland Blvd (53208) Manager-Serena Bethly (414)286-8854 |
| Convent Hill | 455 E Ogden Avenue (53202) Manager-Tina Martin (414)286-8802 |
| Highland Gardens | 1818 W Juneau Avenue (53233) Manager-Lakeidra Madison (414)286-8845 |
| Hillside Terrace | 1419 N. 8 th Street (53205) Manager-Sarah Nazario (414)286-8857 |
| Holton Terrace | 2825 N Holton Street (53212) Manager-Casandra McElroy (414)286-8858 |
| Lapham Park | 1901 N. 6 th Street (53212) Manager-Cordella Young (414)286-8859 |
| Lincoln Court | 2325 S Howell Avenue (53207) Manager-Alma Valle (414)286-8860 |
| Locust Court | 1350 E Locust Street (53212) Manager-Susan Donald (414)286-8861 |
| Merrill Park | 222 N 33 rd Street (53208) Manager-Derrick Braggs (414)286-8862 |
| Mitchell Court | 2600 W National Avenue (53204) Manager-Alma Valle (414)286-8863 |
| Olga Village | 722 W Washington (53204) Ana Castanedo (414)463-3371 |
| Riverview | 1300 E Kane Place (53202) Manager-Crystal Walton (414)286-8866 |
| Lisbon East Campus | 2411 N 51 Street (53210) Jim Wellman (414)286-2931 |
| Westlawn East Midrises: 5560 N. 62 nd St. 5555 N. 62 nd St. | 6236 W. Birch Avenue (53218) Manager-Normalita Truss (414)286-8876 |

Cast iron boilers

The water shall have a maximum water hardness of 8.5 grains or 160 ppm. The recommended pH range is 8.8 to 9.2. However, other aspects of water quality can affect boiler operation and longevity. A qualified water treatment expert should be consulted to develop a complete water treatment plan.

Oxygen contamination of boiler water will cause corrosion of iron and steel boiler components, and can lead to boiler failure. Thermal Solutions Standard Warranty does not cover problems caused by oxygen contamination of boiler water. Proper water treatment and boiler maintenance is required to avoid scale build-up on the inside of the boiler. Thermal Solutions Standard Warranty does not cover problems caused by scale build-up.

When using Glycol products, all Glycol manufacturers' requirements, including rust inhibitors, must be adhered. Max 50% Glycol

Thermal Solution boilers

Recommended Water Quality Requirements

pH: 8.8 - 10.5

TDS: < 3500 ppm

Total alkalinity ppm as CaCO₃: < 1200

Total copper ppm: < .65

Oily matter ppm: < .1

Total hardness ppm: < .3

Chlorides: < 50 ppm

INSURANCE REQUIREMENTS

Before starting work, the Contractor will provide the Housing Authority of the City of Milwaukee ("HACM") proof of Worker's Compensation and Commercial and Public Liability Insurance. The insurance carrier must be licensed to do business in the State of Wisconsin and HACM must be named as an additional insured on general liability.

- The Contractor will carry Worker's Compensation Insurance for all employees engaged in work at the site, in accordance with State or Territorial Worker's Compensation Laws.
- Commercial and Public Liability with bodily injury and property damage limits will be at a combined single limit of at least \$500,000 to protect the contractor and each subcontractor against claims for injury to or death of one or more persons.
- Automobile Liability on owned and non-owned motor vehicles used on the site(s), or in connection with the sites, for a combined single limit for bodily injury and property damage of not less than \$500,000 per occurrence.
- Professional Liability \$1,000,000 per occurrence (if applicable).

Contractor will not allow insurance coverage to lapse and will provide HACM with updated Certificates of Insurance as necessary.

All policies must provide that at least thirty (30) days' notice of cancellation will be given to the HACM and the contractor.

The certificate holder must be noted as:

Housing Authority of the City of Milwaukee
809 N. Broadway
Attn: Purchasing/Contract Services
Milwaukee, WI 53202

The Insurance agent's contact name, phone, fax number, and e-mail address should be on the Certificate of Insurance.

**For any questions regarding insurance, please contact Dana Shepherd,
Purchasing Support Agent, at 414-286-5891 or dlsheph@hacm.org**

Table 5.1, Required Contract Clauses for Small Purchases other than Construction

The following contract clauses are required in contracts pursuant to 24 CFR 85.36(i) and Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. HUD is permitted to require changes, remedies, changed conditions, access and records retention, suspension of work, and other clauses approved by the Office of Federal Procurement Policy. The PHA and contractor is also subject to other Federal laws including the U.S. Housing Act of 1937, as amended, Federal regulations, and state law and regulations.

Examination and Retention of Contractor's Records. The PHA, HUD, or Comptroller General of the United States, or any of their duly authorized representatives shall, until three years after final payment under this contract, have access to and the right to examine any of the Contractor's directly pertinent books, documents, papers, or other records involving transactions related to this contract for the purpose of making audit, examination, excerpts, and transcriptions.

Right in Data and Patent Rights (Ownership and Proprietary Interest). The PHA shall have exclusive ownership of, all proprietary interest in, and the right to full and exclusive possession of all information, materials, and documents discovered or produced by Contractor pursuant to the terms of this Contract, including, but not limited to, reports, memoranda or letters concerning the research and reporting tasks of the Contract.

Energy Efficiency. The Contractor shall comply with all mandatory standards and policies relating to energy efficiency which are contained in the energy conservation plan issued in compliance with the Energy Policy and Conservation Act (Pub.L. 94-163) for the State in which the work under this contract is performed.

Procurement of Recovered Materials .

(a) In accordance with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act, the Contractor shall procure items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR Part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition. The Contractor shall procure items designated in the EPA guidelines that contain the highest percentage of recovered materials practicable unless the Contractor determines that such items: (1) are not reasonably available in a reasonable period of time; (2) fail to meet reasonable performance standards, which shall be determined on the basis of the guidelines of the National Institute of Standards and Technology, if applicable to the item; or (3) are only available at an unreasonable price.

(b) Paragraph (a) of this clause shall apply to items purchased under this contract where: (1) the Contractor purchases in excess of \$10,000 of the item under this contract; or (2) during the preceding Federal fiscal year, the Contractor: (i) purchased any amount of the items for use under a contract that was funded with Federal appropriations and was with a Federal agency or a State agency or agency of a political subdivision of a State; and (ii) purchased a total of in excess of \$10,000 of the item both under and outside that contract.

Termination for Cause and for Convenience (contracts of \$10,000 or more).

(a) The PHA may terminate this contract in whole, or from time to time in part, for the PHA's convenience or the failure of the Contractor to fulfill the contract obligations (cause/default). The PHA shall terminate by delivering to the Contractor a written Notice of Termination specifying the nature, extent, and effective date of the termination. Upon receipt of the notice, the Contractor shall: (1) immediately discontinue all services affected (unless the notice directs otherwise), and (2) deliver to the PHA all information, reports, papers, and other materials accumulated or generated in performing the contract, whether completed or in process.

(b) If the termination is for the convenience of the PHA, the PHA shall be liable only for payment for services rendered before the effective date of the termination.

(c) If the termination is due to the failure of the Contractor to fulfill its obligations under the contract (cause/default), the PHA may (1) require the Contractor to deliver to it, in the manner and to the extent directed by the PHA, any work described in the Notice of Termination; (2) take over the work and prosecute the same to completion by contract or otherwise, and the Contractor shall be liable for any additional cost incurred by the PHA; and (3) withhold any payments to the Contractor, for the purpose of set-off or partial payment, as the case may be, of amounts owned by the PHA by the Contractor. In the event of termination for cause/default, the PHA shall be liable to the Contractor for reasonable costs incurred by the Contractor before the effective date of the termination. Any dispute shall be decided by the Contracting Officer.



SECTION 3 POLICY

HOUSING AUTHORITY OF THE CITY OF MILWAUKEE (HACM)

P.O. BOX 324
MILWAUKEE, WI 53201

Office: (414) 286-2940

Website: <https://www.hacm.org>

INTERNAL PROCEDURES, INSTRUCTIONS, and FORMS

This packet is designed to comply with the New HUD Section 3 Final Rule issued September 29, 2020, and became effective November 30, 2020. Therefore, these documents and instructions are related to the "Hours Worked Benchmarks" as called for in the 24 CFR Part 75 regulation. Most importantly, the rule does not require the hiring or contracting of any person or business that is not fully qualified to perform the work as would be charged. However, the rule makes clear that HUD is intent on ensuring Section 3 persons employed under the new rule receive measurable and sustainable employment. Therefore, Section 3 employees can be counted for up to five full years from the date of certification or hire respectively. HUD is expected to issue continued guidance on the new rule in the future so these documents may change in accordance with the rule.

If you should have any questions on this packet, please contact our Compliance Consultant:

J. Keith Swiney, President/CEO Motivation, Inc.
678-794-3066 keiths@motivation-inc.com

COMPLIANCE FORMS PACKAGE-

SECTION 3 NEW RULE 24 CFR

Part 75

On November 30, 2020, HUD put into effect a New and Final Section 3 Rule for all recipients. This rule is drastically different from the old rule and therefore, we want everyone to know these requirements and plan accordingly.

| | |
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HACM Annual "Section 3 Benchmarks" Requirement Summary

- * Twenty (20) percent or more of the total number of labor hours worked by all workers employed with public housing financial assistance in a HA's fiscal year are Section 3 workers; and
- * Five (5) percent or more of the total number of labor hours worked by all workers employed with public housing financial assistance in a HA's fiscal year are Section 3 workers;
- * There are No specific hiring or contracting goals under this new rule.
- * There is No Section 3 Business Preference under the new rule and no points awarded for being a Section 3 Business.
- * The rule does not require the hiring or contracting of any person or business that is not fully qualified to perform the work.

The two new categories of Section 3 are now referred to as:

- * Section 3 Worker - Any low or very low-income persons residing in the housing authority MSA
- * Targeted Section 3 Worker - Public Housing, Voucher Holder, YouthBuild participant

Contractors will provide these three (3) data sets to the HACM's Section 3 Consultant within 45 days of the month after the hours have been worked by EVERY person that worked directly on the contract. No back-office staff hours are counted:

- * Total Hours Worked by all workers
- * Total Hours Worked by Section 3 Workers (Individual Self-Certification Form Required)
- * Total Hours worked by Targeted Section 3 Workers (Individual Self-Certification Form Required)

There are new definitions of how to be a Section 3 Business Concern:

- * It is at least 51 percent owned by low- or very low-income persons; with businesses at least 6 months old
- * Over 75 percent of the labor hours performed for the business are performed by low- or very low-income persons; or (Based on the prior 90 days of full business payrolls)
- * It is a business at least 51 percent owned by current public housing residents or residents who currently live in Section 8-assisted housing, with businesses at least 6 months old.

MONTHLY REPORTING INSTRUCTIONS

STEP ONE

Enter your company name and the name of the contract or task you are performing in the appropriate lines at the top of the form.

STEP TWO

Determine which workers qualify as Section 3 by having each complete a Section 3 Individual Low- Income Person Self-Certification Form. This form is submitted once per Section 3 employee or those that believe they meet the definition of a Section 3 employee.

The form is to be completed by the individual and stress to the employee that the form is Voluntary:

1. Complete contact info section
2. Check the box that describes your situation
3. Sign and date the form
4. Complete the employer information
5. Return to your employer

STEP THREE

After determining which workers are Section 3, determine their classification based on what they check in the box on the form as **Non-Targeted** or **Targeted**:

Non-Targeted are those Section 3 income-qualified workers who are low-income and reside in the MSA.

Targeted are those Section 3 income-qualified workers who are low-income and reside in public housing, Section 8 or YouthBuild

STEP FOUR

Enter the monthly dates of reporting on the first line, then proceed as follows:

1. Enter total hours worked by ALL contract or project level staff with exceptions as noted above*
2. Enter total hours worked by all Section 3 staff **Non-Targeted**
3. Enter total hours worked by all Section 3 staff **Targeted**

List **ONLY** the individual names of the workers who have self-certified as Section 3 (**Non-Targeted** and **Targeted**) along with their total hours for this month's report only.

Submit the Section 3 Hours Worked Reporting Form on a monthly basis to the contact person noted on your reporting form above.

SECTION 3 BUSINESS

Voluntary Self-Certification Form

IN COMPLIANCE WITH SECTION 3 OF THE HUD ACT OF 1968 UPDATED 24 CFR PART 75 11/30/2020

The purpose of this form is to comply with Section 3 of the HUD Act of 1968 Business Certification requirements. To count as a Section 3 Business your company/firm must meet one of the listed categories below. Each category will require additional documentation to support the election. You must provide that supporting documentation with this form properly completed to be confirmed as a Section 3 business. If this form is submitted without the required supplemental data, your certification will not be processed.

| CATEGORY | DOCUMENTATION REQUIRED | YOUR ELECTION |
|---|---|--|
| a business at least 51 percent owned by low- or very low-income persons; | Proof of ownership showing all owners and their percentages and a completed Section 3 Individual Self-Certification form for all low- and very low-income owners | ← I N I T I A L ← H E R E ← |
| Over 75 percent of the labor hours performed for the business are performed by low- or very low-income persons; or | Provide the last 90 days full payrolls for the entire company, make a list of the names from the payrolls of the Section 3 workers, and provide a completed Section 3 Individual Self-Certification for all low- and very low-income workers you list | |
| It is a business at least 51 percent owned by current public housing residents or residents who currently live in Section 8-assisted housing. | Proof of ownership showing all owners and their percentages and a Section 3 Individual Self-Certification form for all public housing and/or Section 8 owners | |

I hereby certify to the US Department of Housing and Urban Development (HUD) that all of the information on this form is true and correct. I attest under penalty of perjury that my business meets the elected definition and understand proof of this information may be requested. If found to be inaccurate, I understand that I may be disqualified as a certified Section 3 business.

Full Name: _____

Company Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Signature: _____

Date: _____

Voluntary Self-Certification Form

IN COMPLIANCE WITH SECTION 3 OF THE HUD ACT OF 1968 UPDATED 24 CFR PART 75 11/30/2020

The purpose of this form is to comply with Section 3 of the HUD Act of 1968 self-certification income requirements. To count as a Section 3 individual, any legal resident of the United States annual income must not exceed the HUD income limits for the year before they were hired, or, the individual's current year income annualized for the year they are being confirmed as low-income.

Print Name _____

Phone _____

Email _____

Address _____

City _____

County _____

State _____

Zip _____

To qualify as a Section 3 Person, you must meet one of the standards in the brackets below and your individual annual income must not exceed the number in the box below.

Check only one box below that describes your situation:

I am a HACM Public Housing or Section 8 Resident

My employer will certify that I am employed by a Section 3 business

I am a current YouthBuild participant

I am a low or very low-income person residing within the Milwaukee County MSA

My Individual Annual Income does not exceed: \$52,850*

The Milwaukee-Waukesha-West Allis, WI MSA contains the following areas: Milwaukee County, WI; Ozaukee County, WI; Washington County, WI; and Waukesha County, WI.

I hereby certify to the US Department of Housing and Urban Development (HUD) that all of the information on this form is true and correct. I attest under penalty of perjury that my total income is as shown above, and that proof of this information may be requested. If found to be inaccurate, I understand that I may be disqualified as an applicant and/or a certified Section 3 individual. Finally, I authorize including my name on a list of Section 3 Residents seeking employment and to include my contact information so that contractors may contact me directly for any employment opportunities.

Signature: _____

Date: _____

SECTION 3

Hours Worked Reporting Form

IN COMPLIANCE WITH SECTION 3 OF THE HUD ACT OF 1968 UPDATED 24 CFR PART 75 11/30/2020

The purpose of this form is to comply with Section 3 of the HUD Act of 1968 tracking of hours worked by all person's employed by _____ (company name) on the _____ contract including those meeting the Section 3 income requirements as low- or very low-income.

Section 3 Employees are now defined to as:

Section 3 Workers - are those Section 3 income-qualified workers who are low-income and reside in the MSA.

Targeted Section 3 Workers - are those Section 3 income-qualified workers who are low-income and reside in public housing, Section 8 or YouthBuild.

If your company employs any person you believe is low income now or was when they were hired within the past five years, please have them complete the SECTION 3 INDIVIDUAL LOWINCOME PERSON SELF-CERTIFICATION FORM" and return it immediately.

All hours worked by everyone on the project must be reported monthly electronically. If you have questions please contact the projects Section 3 Consultant:

Motivation Compliance and Training, Inc. (M-CAT) compliance@m-cat.co
678-794-3066

In the software, you will report this information for your team as they apply.

- ✱ Total Hours Worked by non-Section 3 staff
- ✱ Total hours worked by all **Non-targeted Section 3** employees
- ✱ Total hours worked by all **Targeted** Section 3 employee

The reporting system website is: To Be Provided Separately
Housing Authority of the City of Milwaukee

Section 3 New Rule Contractor Acknowledgement and Affidavit

(Return this form with your Bid/Quote/Response)

Company Name: _____

Contract or Project Name: _____

Trade Work/Classification: _____

I hereby certify to the US Department of Housing and Urban Development (HUD) that I have read all of the information in this policy package and agree to follow the requirements for complying with the order of prioritization in 75.19 and reporting of all labor hours associated with my contract as required. I further understand that failure to comply with these requirements will cause my payments to be held and not processed or not released until I come into full compliance with this policy.

Monthly, I will be required to provide these data points for all contract staff working directly on the contract **not including any back-office staff**:

- Total Hours Worked by all employees (Section 3 and regular employees)
- Total Hours Worked by All **Non-Targeted Section 3 employees** (Low-Income persons residing in the service area of a one-mile radius of the project where a 5,000 person population exists)
- Total Hours Worked by All **Targeted Section 3 employees** (Public Housing, Section 8, YouthBuild)

You are required to enter the names and hours worked by each Section 3 employee individually.

Signature: _____ Print: _____ Date: _____