



WYOMING
ENERGY
AUTHORITY



INFLATION REDUCTION ACT

HOME EFFICIENCY REBATES (SEC. 50121) & HOME ELECTRIFICATION AND APPLIANCE REBATES (SEC. 50122)

PROGRAM DESIGNER

REQUEST FOR PROPOSAL

Issued by:

Wyoming Energy Authority

1912 Capitol Ave., Suite 305

Cheyenne, WY 82001

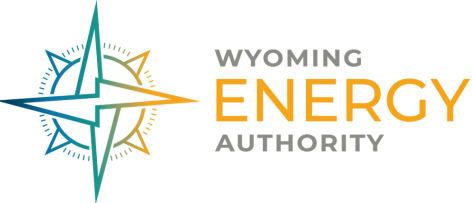
wyoenergy.org

Issue date: August 1, 2024

Closing date: September 20, 2024

Additional copies of this solicitation are available from the Wyoming Energy Authority website at <https://www.wyoenergy.org/news/> This program is subject to the Civil Rights Act of 1964, the Wyoming Fair Employment Practices Act (Wyo. Stat. Ann. §§ 27-9-101 - 106), the Americans with Disabilities Act, 42 U.S.C. § 12101 - 12213, and the Age Discrimination Act of 1975, 42 U.S.C. § 6101 - 6107, and any rules or regulations promulgated under these state and federal anti-discrimination statutes.

Funding recipients shall not discriminate against any individual on the grounds of age, sex, sexual orientation, creed, color, race, religion, national origin, ancestry, pregnancy, or disability in connection with funding under this Request for Proposals.



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ELECTRIFICATION AND APPLIANCE REBATES (SEC. 50122)

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HOME EFFICIENCY REBATES (SEC. 50121) & HOME ELECTRIFICATION AND APPLIANCE REBATES (SEC. 50122)

PROGRAM DESIGNER

REQUEST FOR PROPOSAL

1. INTRODUCTION

The United States Department of Energy (DOE) has additional programs available for use as a result of the passage of the Inflation Reduction Act (IRA). The IRA includes \$391 billion to support energy and includes \$8.8 billion in rebates for home energy efficiency and electrification projects. These home energy rebates are intended to help households save money on energy bills and improve energy efficiency.

The Wyoming Energy Authority (WEA) advocates for, facilitates and advances Wyoming's energy economy to grow a secure and prosperous future for Wyoming's energy and natural resources. Focusing on an "all-of-the-above" energy mix, the WEA's strategy includes products from our legacy fossil industries, along with the newer players of renewable energy and emerging opportunities in hydrogen, advanced nuclear, geothermal, and rare earth elements.

The WEA is the sole state entity eligible to apply for the Home Efficiency Rebates (IRA Section 50121) and Home Electrification and Appliance Rebates (IRA Section 50122) programs. Wyoming's formula allocation for these programs is \$34,686,390 under the Home Efficiency Rebates (IRA Section 50121) program and \$34,484,390 under the Home Electrification and Appliance Rebates (IRA Section 50122) program.

2. PURPOSE, SCOPE OF WORK AND DELIVERABLES

a. Purpose

The WEA is seeking a qualified contractor to develop an application for the Department of Energy Home Efficiency Rebates and Home Electrification and Appliance Rebates programs, in accordance with the Inflation Reduction Act of 2022 Home Energy Rebates. The WEA is required to submit an application for funding under these programs by

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January 31, 2025. The purpose of these programs is to promote energy efficiency in residential properties in an effort to reduce household utility cost.

b. Period of Performance

The WEA is seeking a qualified contractor to design a program for the State of Wyoming, in accordance with the Inflation Reduction Act of 2022 Home Energy Rebates. The contractor will work with the WEA to submit an application for award to DOE by the **January 31, 2025** deadline to apply. It is the WEA's preferred method to have this selected contractor implement and manage the programs throughout the duration of award; however, if it is determined by the WEA, or the contractor, that the contractor is unwilling or unable to implement and manage the programs post-design, then the WEA will issue an additional Request for Proposals (RFP) for program planning and management.

DOE anticipates making awards that will run a maximum of 8 years in length, comprised of one budget period ending not later than September 30, 2031. DOE will evaluate project performance, project schedule adherence, the extent milestone objectives are met, compliance with reporting requirements, and overall contribution to the program goals and objectives.

c. Allowable Activities

- i. Funding commercially available energy efficiency upgrades, provided that projects adhere to the requirements of Wyoming's DOE executed Historic Preservation Programmatic Agreement, and are installed in existing buildings, without ground disturbance beyond placement of a slab for heating and/or cooling units adjacent to the foundation of a building, do not require structural reinforcement, no trees are removed or trimmed, are appropriately sized, and are limited to:
 1. Insulation applied to building structures, ducts, hot water heater tanks, and heating pipes.
 2. Installation of air sealing materials, weather stripping and/or other weather sealing materials on building structures and/or ducts.
 3. Installation of new or improvement to existing ventilation systems.

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4. Installation of programmable and smart thermostats.
5. Installation of energy efficient lighting.
6. Upgrading, retrofitting, tuning, repairing, and/or replacing existing heating, ventilation, and air conditioning (HVAC) equipment.
7. Repairing and/or replacing water heating system equipment.
8. Installation of energy or water monitoring and control systems.
9. Retrofitting, repairing, and/or replacing of windows and doors, including installation of energy-efficient storm windows and energy-saving window attachments.
10. Installation of new appliances or replacement of existing home appliances with more efficient appliances that are powered through either the same fuel source or electric power.
11. Electric load service center/electric panel upgrades.
12. Electric wiring upgrades to accommodate home electrification and electric load service center/electric panel upgrades.
13. Installation of Combined Heat and Power System—systems sized appropriately for the buildings in which they are located, not to exceed peak electrical production at 300kW).
14. Installing, repairing, or optimizing use of energy storage systems, including electrochemical and thermal storage systems, provided that projects adhere to the requirements of the respective state’s DOE executed Historic Preservation PA are installed in or on an existing structure, without ground disturbance, do not require structural reinforcement, no trees are removed or trimmed, and are appropriately sized not to exceed 400kWh.

d. Scope of Work

The selected contractor shall be responsible for the design of the following programs:

i. Home Efficiency Rebates Program (IRA Sec. 50121)

The Home Efficiency Rebates Program aims to incentivize homeowners to invest in energy-efficient upgrades and improvements to their residences. This program will offer rebates

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for eligible energy-efficient home improvements, such as insulation, HVAC upgrades, window replacements, and other eligible efficiency measures.

ii. Home Electrification and Appliance Rebates Program (IRA Sec. 50122)

The Home Electrification and Appliance Rebates Program aims to encourage the adoption of electric appliances and systems over traditional alternatives. Rebates will be provided for electric heating systems, water heaters, cooking appliances, and other eligible electric appliances.

The scope of work for this program design is as follows:

1. Conduct background research and collect data to inform program design:
 - a. Review and summarize federal program requirements.
 - b. Conduct background research, including literature review to identify best practices.
 - c. Document existing program landscape (within state or region) to identify potential programs to leverage or gaps in existing programs, including:
 - i. Other funding opportunities available to households
 - ii. Existing rebates offerings (e.g., amounts, eligibility requirements, qualified product lists, incentive delivery methods)
 - iii. Existing market engagement efforts (e.g., qualified contractor networks)
 - iv. Program achievements and hard-to-reach markets
 - v. Potential for coordination with Community-Based Organizations
 - d. Identify legal, policy, or political challenges and opportunities related to program implementation.
2. Develop high-level program design strategy.
 - a. Identify program(s) and paths for Wyoming to apply for and implement.
 - b. Identify key program aspects such as:
 - i. Eligible Households
 - ii. Eligible Upgrades
 - iii. Income verification methods
 - iv. Rebate amounts and project cost caps

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- v. Education and outreach strategy
 - vi. Managing qualified contractor networks
 - vii. Data collection and reporting methods
 - c. Develop strategy for integrating rebates with existing federal, state, utility, and community-based programs, as appropriate and permitted under the law such as:
 - i. Developing co-branded customer resources (e.g., technology pages, brochures, webinars)
 - ii. Integrating network enrollment processes for participating contractors
 - d. Conduct technical and financial analyses to support program design, such as:
 - i. Forecasts of energy savings by program
 - ii. Identification and review of tools available to support the program(s)
 - iii. Financial analyses of proposed implementation approaches, including the integration of federal funding with existing state and utility incentive offers
3. Design and conduct stakeholder outreach
- a. In collaboration with the WEA, identify relevant stakeholders and categorize the types of collaboration needed.
 - b. Conduct community and market research to support stakeholder engagement, identify existing program staff, supply chain contacts, and tradespeople that should be engaged or informed as programs proceed.
 - c. Engage with external stakeholders and agencies to determine needs for residents, manufacturers, distributors, retailers, and contractors.
 - d. Develop a strategy and timeline for scheduling, hosting, and convening stakeholder meetings.
 - e. Facilitate meetings, including development of agendas, discussion facilitation, and record keeping.

The scope of work for incorporating this program design into an application to be submitted to the DOE is as follows:

- 4. Establish an application project management plan and timeline that includes:
 - a. Key dates.

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- b. Required documents and workbooks.
 - c. Application tasks.
 - d. Application milestones.
 - e. Expected roles and responsibilities of various staff (i.e. state, contractors, partners).
5. Develop program application materials, including:
- a. Review of sample application responses.
 - b. Identification of needed information to draft responses.
 - c. Draft of initial state narrative responses.
 - d. Completion of budget templates, including forecasts of administrative, project and rebate budgets.
 - e. Completion of all other applicable required documents.
 - f. Management of review and editing process for application responses.
 - g. Management of communications and versions of drafts between DOE and state during review and revision process.
6. Develop Implementation Blueprints, including:
- a. A Community Benefits Plan.
 - b. An Education and Outreach Strategy.
 - c. A Consumer Protection Plan.
 - d. A Utility Data Access Plan.
 - e. A Privacy and Security Risk Assessment for State Systems.
 - f. A Market Transformation Plan.

e. Deliverables

The selected contractor will work alongside the WEA to achieve the expected deliverables over the course of approximately four months, specifically 112 days from the expected contract signature date to the application due date:

i. Program Design Deliverables

1. Program Design Strategy Narrative.
 - a. Detailed program aspects including:
 - i. Eligible Households
 - ii. Eligible Upgrades
 - iii. Income verification methods
 - iv. Rebate amounts and project cost caps

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- v. Education and outreach strategy
 - vi. Managing qualified contractor networks
 - vii. Data collection and reporting methods
 - b. Forecasts of energy savings by program.
 - c. Review of available tools to support the program.
 - 2. Integration Strategy Narrative
 - a. Strategy for integrating rebates with existing federal, state, utility, and community-based programs.
 - b. Consumer resources.
 - c. Integrated network enrollment processes for contractors.
 - d. Financial analyses of implementation approaches, including integration of federal funding with state and utility incentives.
- ii. Stakeholder Engagement Deliverables**
 - 1. Stakeholder Identification and Engagement Strategy Narrative.
 - a. Identification and categorization of relevant stakeholders.
 - b. Strategy and timeline for stakeholder meetings.
 - c. Identification of existing supply chain contacts and tradespeople.
- iii. DOE Application Deliverables**
 - 1. Application Project Management Plan Document and Timeline:
 - a. Key dates.
 - b. Required documents and workbooks.
 - c. Application tasks and milestones.
 - d. Roles and responsibilities of staff.
 - 2. Program Application Materials:
 - a. Identification of needed information for draft responses.
 - b. Draft initial Wyoming narrative responses.
 - c. Completion of budget templates (administrative, project, rebate budgets).
 - d. Completion of all other required documents.
 - e. Management of review and editing process for application responses.
 - f. Management of communications and draft versions with DOE and WEA during review and revision.
 - 3. Implementation Blueprints:

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- a. Community Benefits Plan.
- b. Education and Outreach Strategy.
- c. Consumer Protection Plan.
- d. Utility Data Access Plan.
- e. Privacy and Security Risk Assessment for State Systems.
- f. Market Transformation Plan.

3. APPLICANT ELIGIBILITY AND DESIRED QUALIFICATIONS

Participation in this program is open to all companies, organizations, and individuals who have the experience and capacity to undertake such an engagement.

A Qualified Contractor must meet the following qualification criteria:

- a. 3+ Years of experience in designing and implementing energy efficiency rebate programs.
- b. 3+ Years of experience applying for federal grants.
- c. Knowledge of relevant federal and state energy efficiency and electrification regulations.
- d. Familiarity with IRA Sections 50121 and 50122.
- e. Ability to effectively market and promote the programs to homeowners.
- f. Strong data collection and reporting capabilities.

Additional desired qualifications include but are not limited to:

- a. Established partnerships with existing residential rebate programs in Wyoming.
- b. Established partnerships with local contractors and suppliers.
- c. Established partnerships with local workforce development organizations.

Subcontractors are permitted provided they possess the same required qualifications described above or are under the direct supervision of one person meeting these qualifications.

4. RFP Q&A (QUESTIONS AND ANSWERS)

Any questions regarding this solicitation must be submitted in writing to Patrick Millin, SEP Program Manager, via email at: patrick.millin@wyo.gov no later than Friday, September 6th, 2024 at 5:00 p.m. MST. WEA will submit responses to questions within seven (7) days of receipt and will be posted on

the WEA website at: wyoenergy.org in accordance with Section 6. Answers will be posted starting August 8, 2024 - September 20, 2024.

Please be advised that the WEA reserves the right to transmit those questions and answers of common interest to all prospective responders. Questions will not be taken via phone or in-person. Please include “IRA Rebates Contractor RFP Query” in the subject line.

5. SCREENING AND EVALUATION PROCESS

a. Screening

The Wyoming Energy Authority will screen all submissions prior to official review to ensure completeness and compliance with the requirements of this solicitation. Those submissions that do not comply, or are otherwise deemed to be non-responsive, will be returned to the Applicant with an explanation of the submission’s deficiencies. All accepted submissions will be reviewed by the agency. Applicants may be contacted directly if the WEA requires clarification or more information.

b. Evaluation Criteria

Submissions will be evaluated according to the criteria described below:

- i. Applicant’s qualifications, experience, demonstrated capabilities, understanding of requirements, and references. Note that preference will be given to applicants who display the highest level of experience in designing and implementing residential energy efficiency and electrification programs of similar scope and size.
- ii. Timeframe and Ability to Meet Deadlines - Flexibility and willingness to accommodate the requirements from both rebate programs and ability to complete the required deliverables within the required timeframe.
- iii. Cost for Services - including any other related fees.
- iv. Responsiveness – The degree to which the applicant has responded to the purpose and scope of the specifications, the flexibility to meet the agency’s needs, conformance in all material respects to this request for proposal, etc.
- v. Responsibility – The applicant clearly displays evidence of the capability to perform the scope of work and contract

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- requirements, and is of the moral and business integrity and reliability which will assure good faith performance as required.
- vi. Compliance and Good Standing - Compliance with all state and federal entities that govern business operations, including, but not limited to, possessing good standing with the State of Wyoming Secretary of State and having no indictments or convictions past/present/or current resulting in suspension and debarment for federal funding.
 - vii. Insurance - Maintaining sufficient general liability insurance.
 - viii. Suitability of the proposal to fulfill the requirements - Proposals must show the ability to complete all items described in the scope of work.

The Wyoming Energy Authority will rank the submissions according to the guidelines and evaluation criteria. The Wyoming Energy Authority reserves the right, without limitation or qualification, to consider any other criteria or factors that the agency deems relevant to provide the best services.

NOTE: Decisions of the Wyoming Energy Authority are final and are not subject to appeal.

c. Applicant Notification

All Applicants will be notified by email regarding the outcome of the evaluation process and final vendor selection by the date indicated in Section 6.

6. DATES

All dates and times are Mountain Time and subject to change at the sole discretion of the Wyoming Energy Authority. Proposals received after the time and date specified will not be considered.

- a. Issue Date: **August 1, 2024**
- b. Deadline for submission of questions: **September 6, 2024**
- c. Q&A Posted on WEA website under this RFP solicitation: **August 8, 2024 - September 13, 2024**
- d. Close Date: **September 20, 2024 5:00 PM Mountain Time**
- e. Internal review process: **September 20, 2024 - September 30, 2024**
- f. Target date for notification of contract award: **September 30, 2024**
- g. Target date for contract execution: **October 11, 2024**

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- h. Target date for vendor to initiate work: **October 11, 2024**
- i. Progress meetings: Conducted weekly via conference call with WEA's SEP Manager Patrick Millin, subject to change
- j. Final deliverables: Work as described in Sec. 2, e. must be completed by January 31st, 2025.

7. RIGHTS AND DISCLAIMERS

The Wyoming Energy Authority reserves the right, without limitation or qualification and at its sole discretion, to extend or terminate this solicitation process at any time. The Wyoming Energy Authority reserves the right, without limitation or qualification, to reject any submission at any part of this solicitation process. All decisions made by the Wyoming Energy Authority are not subject to appeal.

8. SUBMITTAL INFORMATION

All costs incurred in the preparation and presentations of the submission are the applicant's sole responsibility. All documentation submitted with the submission will become the property of the Wyoming Energy Authority.

Submission method: Upload submissions via email to wea@wyo.gov. The subject line of the email should read "IRA Rebates Contractor RFP Proposal - [Company Name]". A confirmation email acknowledging receipt of the proposal will be sent within the next business day of submission. The submission time and date will be based on the timestamp of the proposal submission email.

Confidentiality: The proposer shall clearly identify all information that is considered confidential (Wyoming Public Records Act, W.S. 16-4-201 through 16-4-205). Identify each confidential page with "CONFIDENTIAL" in capital bold letters centered at the bottom of each page, and preface each line that is confidential with an asterisk (*). Information not clearly marked may be considered public.

Proposal information is restricted and not publicly available until after award.

Submissions must include:

- a. Exhibit 1: Application Form, signed by the proper official.
- b. Exhibit 2: Confidential Disclosure Agreement.
- c. Exhibit 3: Certifications Signature Page.

- d. Narrative statement of approach to achieve the deliverables in the desired timeframe (limited to 5 pages).
- e. Narrative of organization and statement of qualifications (limited to 5 pages). This statement must include:
 - i. Company profile to include specific experience (background, qualifications, etc.).
 - ii. Profile of any associated firms or organizations that would be involved in providing services whether directly or via sub-contract.
 - iii. Total cost estimate to complete the Scope of Work. Cost breakdown of all materials and services for the project period, including staff name to be used, respective hourly rate, estimated project working hours. Travel expenses, and a clear narrative description for each detailed cost.
 - iv. Proposed project timeline displaying the project deliverables. Proposers are encouraged to use Gantt charts, PERT plans and other graphic project timeline tools to present their approach to project timelines and deliverables.
 - v. A commitment that demonstrates flexibility and willingness to accommodate the varying demands and timelines that arise from complex projects.
- f. Names of key personnel. The contractor shall submit names for all key personnel to be utilized on the project and names for any subcontractors that will be utilized. A narrative document shall be provided to describe the role and responsibilities for each key personnel. The contractor shall identify a Project Manager and a substitute Project Manager for the term of the contract.

9. NO PAYMENT FOR UNAUTHORIZED WORK

No payments will be made for any unauthorized supplies and/or services, or for any unauthorized changes to the work specified herein. This includes any services performed by the Contractor of their own volition or at the request of an individual other than a duly appointed Contracting Officer. Only a duly appointed Contracting Officer is authorized to change the specifications, terms, and conditions under this effort.

EXHIBIT 1

APPLICATION FORM

**HOME EFFICIENCY REBATES (SEC. 50121) & HOME ELECTRIFICATION AND
APPLIANCE REBATES (SEC. 50122) PROGRAM DESIGNER**

Proposal Title:

Instructions: Please complete the form below. Attach additional pages as needed for additional investigators. Each additional investigator shall provide a brief letter from their organization authorizing their participation in the project signed by both the additional investigator and the organization authority if that is a separate person.

Organization Authority Information:

Name	
Title	
Organization	
Mailing Address (City, State, Zip)	
Phone	
Email	

Principal Investigator Information:

Name	
Title	
Organization	
Mailing Address (City, State, Zip)	
Phone	
Email	

Additional Investigator Information:

Name	
Title	
Organization	
Mailing Address (City, State, Zip)	
Phone	
Email	

Exhibit 1 Signatures:

Principal Investigator

Date

Authorized Official (if different than above)

Date

EXHIBIT 2

CONFIDENTIAL DISCLOSURE AGREEMENT

HOME EFFICIENCY REBATES (SEC. 50121) & HOME ELECTRIFICATION AND APPLIANCE REBATES (SEC. 50122) PROGRAM DESIGNER

The **Wyoming Energy Authority (“WEA”)**, 1912 Capitol Ave., Suite 305, Cheyenne, Wyoming 82001, understands that **[Submitting Company Name and Address]** **Insert here (“Company”)** may wish to disclose to the **WEA** information related to “IRA Home Rebate Programs” hereinafter referred to as “Proprietary Information” for evaluation purposes. All Proprietary Information shall be disclosed in writing and identified by Company as confidential or proprietary or disclosed orally and then promptly reduced to writing and identified in such writing by **Company** as confidential or proprietary.

The **WEA** agrees (i) to hold Proprietary Information in confidence and to take all reasonable precautions to protect such Proprietary Information, including, without limitation, all precautions that the **WEA** employs with respect to its confidential materials, (ii) not to divulge any Proprietary Information or any information derived therefrom to any third party, (iii) not to make copies of any Proprietary Information except as necessary for the purpose expressly allowed hereunder, (iv) not to use the Proprietary Information for any commercial purposes, except with the prior agreement of Company. Disclosure of Proprietary Information by the **WEA** shall only be made to those employees, directors, officers, consultants, and outside reviewers who have a need to know the Proprietary Information for the purpose described above and who are under similar obligations of confidentiality and non-use. Should the **WEA** be required by judicial or other governmental authority to disclose Proprietary Information, it shall inform and cooperate with **Company** in responding to such requirement.

The foregoing obligations shall not apply with respect to information the **WEA** can document (i) is in or enters the public domain through no improper action or inaction by the **WEA**, or (ii) was in its possession or known by it prior to receipt from **Company**, or (iii) was rightfully disclosed to it by a third party without restriction, or (iv) was independently developed by the **WEA** or its employees, without use of the subject Proprietary Information.

The **WEA** understands that nothing herein (i) requires the disclosure of any Proprietary Information; Proprietary Information shall be disclosed, if at all, solely at the option of **Company** or (ii) requires **Company** to proceed with any proposed



transaction or relationship in connection with which Proprietary Information may be disclosed.

The **WEA** does not waive its sovereign immunity or its governmental immunity by entering into this agreement and fully retains all immunities and defenses provided by law with regard to any action based on this agreement. The laws of Wyoming shall govern this agreement.

This agreement is effective on the date of last signature hereto. This agreement shall expire five (5) years from the effective date, and all Proprietary Information shall be subject to the restrictions of this agreement for ten (10) years after expiration.

Exhibit 2 Signatures:

Principal Investigator

Date

Authorized Official (if different than above)

Date

EXHIBIT 3

CERTIFICATIONS SIGNATURE PAGE

HOME EFFICIENCY REBATES (SEC. 50121) & HOME ELECTRIFICATION AND APPLIANCE REBATES (SEC. 50122) PROGRAM DESIGNER

The undersigned agrees to provide a statement of qualifications to provide the services requested in this Request for Proposal.

By submission, the proposer certifies:

- Prices in this submission have been arrived at independently, without consultation, communication or agreement for the purpose of restricting competition
- No attempt has been made nor will be by the submitter to induce any other person or firm to submit a proposal for the purpose of restricting competition
- The person signing this submission certifies that he/she is authorized to represent the company and is legally responsible for the decision as to the price and supporting documentation provided as a result of this solicitation
- Applicant will comply with all State of Wyoming and Federal regulations, policies, guidelines and requirements, as applicable
- Prices in this proposal have not been knowingly disclosed by the submitter and will not be prior to award to any other submitter
- Direct purchases of material by the State of Wyoming are exempt from Wyoming Sales or Use Tax. The undersigned certifies that no Federal, State, County or Municipal tax will be added to the above-quoted prices
- Terms: Net 45; (Wyoming Statute § 16-6-602)
- The undersigned certifies and agrees that this request for proposal is submitted in accordance with all applicable Wyoming laws
- By signing below, the submitter certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency in accordance with 2 CFR Part 180

‡ *Fill in completely* ‡

COMPANY NAME OF APPLICANT

PO BOX/ STREET ADDRESS

TELEPHONE NUMBER

CITY, STATE AND ZIP CODE

AUTHORIZED OFFICIAL NAME (printed)

AUTHORIZED OFFICIAL SIGNATURE

E-MAIL ADDRESS

DATE

Verification: I certify, under penalty of perjury, that I am a responsible official (as identified above) for the business entity described above as Applicant, that I have personally examined and am familiar with the information submitted in this disclosure and any attachments, and that the information is true, accurate, and complete.