



# **REQUEST FOR PROPOSAL #R10-1133 FOR: LIGHTING PRODUCTS AND SERVICES**

January 28, 2022

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# Proposal Form Checklist

## The following documents must be submitted with the Proposal

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The below documents can be found in Section 2; Proposal Submission and Required Bid Forms and must be submitted with the proposal. Please note Proposal Form 1 is a separate attachment (attachment B).

**PROPOSAL PRICING:** Attachment B is provided separately in a Microsoft Excel file and is required to complete your price proposal.

**PROPOSAL FORM 1: ATTACHMENT B - PRICING**

### QUESTIONNAIRE & EVALUATION CRITERIA:

**PROPOSAL FORM 2: QUESTIONNAIRE & EVALUATION CRITERIA**

### OTHER REQUIRED PROPOSAL FORMS:

- PROPOSAL FORM 3: CERTIFICATIONS AND LICENSES**
- PROPOSAL FORM 4: CLEAN AIR AND WATER ACT**
- PROPOSAL FORM 5: DEBARMENT NOTICE**
- PROPOSAL FORM 6: LOBBYING CERTIFICATION**
- PROPOSAL FORM 7: CONTRACTOR CERTIFICATION REQUIREMENTS**
- PROPOSAL FORM 8: ANTITRUST CERTIFICATION STATEMENTS**
- PROPOSAL FROM 9: IMPLEMENTATION OF HOUSE BILL 1295**
- PROPOSAL FROM 10: BOYCOTT CERTIFICATION AND TERRORIST STATE CERTIFICATION**
- PROPOSAL FORM 11: RESIDENT CERTIFICATION**
- PROPOSAL FORM 12: FEDERAL FUNDS CERIFICATION FORM**
- PROPOSAL FORM 13: ADDITIONAL ARIZONA CONTRACTOR REQUIREMENTS**
- PROPOSAL FORM 14: OWNERSHIP DISCLOSURE FORM (N.J.S. 52:25-24.2)**
- PROPOSAL FORM 15: NON-COLLUSION AFFIDAVIT**
- PROPOSAL FORM 16: AFFIRMATIVE ACTION AFFIDAVIT (P.L. 1975, C.127)**
- PROPOSAL FORM 17: C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM**
- PROPOSAL FORM 18: STOCKHOLDER DISCLOSURE CERTIFICATION**
- PROPOSAL FORM 19: GENERAL TERMS AND CONDITIONS ACCEPTANCE FORM**
- PROPOSAL FORM 20: EQUALIS GROUP ADMINISTRATION AGREEMENT**
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- PROPOSAL FORM 22: VENDOR CONTRACT AND SIGNATURE FORM**

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**PROPOSAL FORM 1: ATTACHMENT B – PRICING**

Pricing should be entered in the attachment B Excel form provided in this RFP packet. Please reference Section 1, Part B, Instructions to Proposers, for more information on how to complete pricing.

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**PROPOSAL FORM 2: QUESTIONNAIRE & EVALUATION CRITERIA****Instructions:**

Respondents should incorporate their questionnaire responses directly into the green cells below. Failure to provide responses in this format may result in the proposal being deemed as non-responsive at the sole discretion of Region 10.

Respondents may incorporate additional documents as part of their response which may be utilized by Region 10 as part of the evaluation. Additional documents must be consolidated as part of this Section 2 at the end of your response.

Region 10 has associated the evaluation criteria with the question that most closely aligns with that respective evaluation criteria. Region 10 reserves the right at its sole discretion to base its evaluation and specific evaluation criteria on any part of the respondent's proposal.

<b>Evaluation Criteria</b>	<b>Question</b>	<b>Answer</b>
<b>Basic Information</b>		
Required information for notification of RFP results	<i>What is your company's official registered name?</i>	AZ Insulation and Energy Solutions dba Tru Lite
	<i>What is the mailing address of your company's headquarters?</i>	7205 E Southern Ave, Suite 120 Mesa, AZ 85209
	<i>Who is the main contact for any questions and notifications concerning this RFP response, including notification of award? Provide name, title, email address, and phone number.</i>	Robert Ellsworth Partner <a href="mailto:rob.trulite@gmail.com">rob.trulite@gmail.com</a> 602-320-5111
<b>Products/Pricing (30 Points)</b>		
Coverage of products and services	No answer is required. Region 10 will utilize your overall response and the products/services provided in Attachment B to make this determination	
Ability of offered products and services to meet the needs requested in the scope	No answer is required. Region 10 will utilize your overall response and the products/services provided in Attachment B to make this determination	
Pricing for all available products and services, including warranties if applicable	<i>Does the respondent agree to offer all future product and services at prices that are proportionate to contract pricing offered herein?</i>	Yes
	<i>Does pricing submitted include the required administrative fee of 2.25%?</i>	Yes
	<i>Do you offer any other promotions or incentives for customers? If yes, please describe.</i>	Yes, local Utility rebates as applicable.

Ability of Customers to verify that they received contract pricing	<i>Were all products/lines/services and pricing being made available under this contract provided in the attachment B and/or Appendix B, pricing sections?</i>	Yes
	<i>Outline your pricing strategy provided in Attachment B. If utilizing a list price, please indicate where agencies can find the list and your methodology for determining that list price.</i>	We have very good buying power and use a national supplier and often purchase direct from the manufacturer, rendering us extremely competitive from a product stand point. We have the lowest labor rates in the industry for construction.
Payment methods	<i>Define your invoicing process and methods of payments you will accept. Please include the overall process for agencies to make payments</i>	The entity using the contract will make payments directly to the awarded vendor or their affiliates as long as written request and approval by NCPA is provided to the awarded vendor.
Other factors relevant to this section as submitted by the Respondent	No answer is required. Region 10 will utilize your overall response and the products/services provided in Attachment B to make this determination	
<b>Performance Capability (25 Points)</b>		
Ability to deliver, design, and install products and services	<i>Please outline your products and services being offered, including the features and benefits and how they address the scope being requested herein. Please be specific; your answer to this question, along with products/services provided in your pricing file will be used to evaluate your offering.</i>	Comprehensive Energy Audits and Project Fulfillment: We provide comprehensive investment grade energy audits to assess the multiple areas where energy conservation measures can positively impact an organization's energy usage and costs. This is a holistic review and includes HVAC, Solar, lighting, CHP, etc. Costs for this audit will be waived upon acceptance of an energy reduction proposal/project which we can fulfill upon request.
	<i>Please outline any other services you provide, such as energy management, design, financial services, other products etc.</i>	Solar, HVAC, Insulation, CHP
	<i>States Covered - Respondent must indicate any and all states or geographies where products and services are being offered. If your services are limited to a certain area, please be specific on the area your services are provided.</i>	We service Arizona, California, Idaho, Nevada, Texas, and Utah.
	<i>List the number and location of offices, or service centers for all states being proposed in solicitation</i>	We have one Office Location: 7205 E Southern Ave, Suite 120 Mesa, AZ 85209
History of meeting the delivery, installation, and maintenance timelines	<i>Outline the typical installation and startup process, anticipated timelines and any ongoing maintenance that may be required.</i>	<ol style="list-style-type: none"> <li>1. Management meets with facility personnel to form a strategy for installation that will be best for the facility staff and operations.</li> <li>2. Construction schedule to be determined and delivered. (Timelines to be determined based on the project)</li> <li>3. Staging area identified and secured for product delivery.</li> <li>4. Kick off meeting with facility personnel to start project while working with onsite staff to ensure quality and transparency to the customer.</li> <li>5. Best safety practices are adhered to.</li> <li>6. Project managers to report progress to customer weekly.</li> </ol>



		<p>7. Close out meeting/inspection done by management and customer to ensure project is 100% and complete and done to the satisfaction of the customer.</p> <p>8. After a certificate of completion has been received, Tru Lite will schedule a 90-day follow up with the customer to check for manufacturer defects or any issues that have come about from the project.</p> <p>9. All project information which includes specification sheets and warranty information will be provided to the customer. Tru Lite offers a 1-yr workmanship warranty and product warranties vary from 5-25 years.</p>
Response to emergency orders and maintenance repair/requests	<i>Describe the type of emergency orders or requests your organization typically receives and how you respond to those requests</i>	We keep a small amount of the most common parts in our warehouse in order to respond quickly b. We also have alternative suppliers with whom we have relationships who can often ship when our normal supplier may be delayed
Ability to meet the warranty needs of members	<i>Describe the warranty, including equipment, parts, labor, software, hardware and any other service or equipment that would require a warranty. Include how you support the warranty.</i>	We warranty our services/work for 1 year. Equipment varies depending on the lamp or fixture but is usually in the 5-10 year range. We can purchase an extended warranty if required by the customer. We contact the supplier(s) and ask if they will allow us to purchase an extended warranty for the customer and add that to the proposal up front if requested by the customer. We also regularly add some stock to the proposal so the customer has some on their shelf in case of need so they do not need to call and purchase every time they have an outage. In Arizona we regularly give a 2-year workmanship warranty to our customers as part of our normal offerings. Most replacement parts have a 5-year manufacturer's warranty and others have as many as 7 years.
Return and restocking policy and applicable fees	<i>Please describe your company's return and restocking policy, including any commitments necessary for services and fees for agencies to end services early.</i>	We have a 20% product restocking fee.
Customer service/problem resolution	<i>Describe your company's Customer Service Department (hours of operation, how you resolve issues, number of service centers, etc.).</i>	All of our follow up customer service issues are handled through our lighting services subcontractor using a reporting ticket system that is cross copied directly through our company. This saves time by going directly to the subcontractor service staff who can respond quickly. The service center is centralized for the southwest region and is located in the Phoenix area of Arizona. We carry a small in-house inventory of replacement parts that can be dispatched immediately if the subcontractor service center is out
Financial condition of vendor	<i>Demonstrate your financial strength and stability with meaningful data. This could include, but is not limited to, such items as financial statements, SEC filings, credit &amp; bond ratings, letters of credit, and detailed reference letters</i>	Balance Sheet and P&L Statement for 2-18 through 2021 is attached.
	<i>What was your annual sales volume over last three (3) years?</i>	\$2 million annually
Capabilities related to ordering, returns, reporting, and overall website ease-of-use	<i>Provide relevant information regarding your ordering process and overall implementation.</i>	If we are working with a procurement arm such as CES, the customer sends a PO to CES. CES sends a PO to us. We put together the bill of material through our suppliers and place the orders in such a way as to minimize delivery times. The customer pays CES and CES pays us once the project is complete. We evaluate the availability of products from our suppliers to validate timely

		delivery. If there are delays with any suppliers, we proactively work to create orders where the project timeline will not be impacted by shipping delays Once the optimal delivery schedules have been verified, we place the orders.
Training & Implementation	<i>Describe training or support you provide to help agencies understand how to utilize the spaces and technology equipment being installed.</i>	The vendor shall provide timely and accurate technical advice and sales support. The vendor shall respond to such requests within one (1) working day after receipt of the request
Security protocols	<i>Describe security protocols in place, including cybersecurity and the safe transmission of data</i>	We take high security measures physically and electronically. We specifically have all devices used for the transmission of data, or work of any kind, protected with McAfee Protection.
Integration with other platforms	<i>Describe any integrations your organization can provide with other platforms or systems.</i>	We have integrated with Podio, Spotio, Calendly, Sales Force, etc.
Other factors relevant to this section as submitted by the Respondent	<i>Describe the capacity of your company to provide management reports, i.e. consolidated billing by location, time and attendance reports, etc. for each eligible agency</i>	All management reports such as billing and progress schedules are coordinated at our main office in Mesa, Arizona.
	<i>Provide your safety record, safety rating, EMR and worker's compensation rate where available.</i>	To date, we have not had any lost hours due to work related accidents. We have never had a worker's comp claim.  *EMR Attached*
<b>Qualification and Experience (25 Points)</b>		
Respondent reputation in the marketplace	<i>Provide a link to your company's website</i>	<a href="https://www.trulitesolutions.com/">https://www.trulitesolutions.com/</a>
	<i>Please provide a brief history of your company, including the year it was established.</i>	The company was established 2014 and initially was an insulation company doing retrofits for residential and commercial insulation. The company teamed up with Graybar Electric and began doing commercial lighting installations in 2016. For the last three years AZ Insulation & Energy Solutions doing business as Tru Lite has performed as subcontractor to companies such as Honeywell and McKinstry. In addition, we have self-performed high profile electrical lighting contracts as well as ESCO projects primarily in Arizona and New Mexico. We are licensed as a General Contractor for commercial and residential.
Past relationship with Region 10 ESC and/or Region 10 ESC members	<i>Have you worked with Region 10 in the past? If so, what was the timeframe for that work?</i>	No.
Experience and qualification of key employees	<i>Please provide contact information and resumes for the person(s) who will be responsible for the following areas. Region 10 requests contacts to cover the following: * Executive Support * Account Manager * Contract Manager * Marketing * Billing, reporting &amp; Accounts Payable</i>	Sales Reports / Accounts Payable / Account Manager Contact Person: Ashley Jones Title: Director of Operations Company: AZ Insulation & Energy Solutions 7205 E. Southern Ave., Suite 120 Mesa, AZ 85209 Phone: 602-980-1556 Email: ashley@az-insulation.com  Purchase Orders / Contract Manager: Contact Person: Joseph Papa Title: Director of Sales



		<p>Company: AZ Insulation &amp; Energy Solutions  Address: 7205 E. Southern Ave., Suite 120 Mesa, AZ 85209  Phone: 602-568-1356  Email: <a href="mailto:joepapamgr@yahoo.com">joepapamgr@yahoo.com</a>.</p> <p>Sales and Marketing:  Contact Person: Robert Ellsworth  Title: Director of Sales  Company: AZ Insulation &amp; Energy Solutions  Address: 7205 E. Southern Ave., Suite 120 Mesa, AZ 85209  Phone: 602-320-5111  Email: <a href="mailto:rob.trulite@gmail.com">rob.trulite@gmail.com</a></p> <p>*Resumes attached at the end of this document*</p>
Past experience working with the public sector	<p><i>What are your overall public sector sales, excluding Federal Government, for last three (3) years?</i></p>	\$2,649,000.00
	<p><i>What is your strategy to increase market share in the public sector?</i></p>	We have contracted marketing firms whose job is to contact commercial and public entities or to use online tools/resources to generate leads. Should we be selected for this RFP, we will work with our marketing agencies to increase our territory reach and call volume and to focus on the appropriate public organizations and agencies that can benefit from this contract. We will continue to expand our offering as a subcontractor to McKinstry and Honeywell. Internally our sales teams are currently working to contact public entities within the southwest region in the normal course of our ESCO offerings. Lately we have been specifically targeting all public education entities in AZ and NM. Those that we have not been able to work with due to lack of a procurement vehicle will be contacted again do discuss the opportunities brought by the ESC contract
Past litigation, bankruptcy, reorganization, state investigations of entity or current officers and directors	<p><i>Provide information regarding whether your firm, either presently or in the past, has been involved in any litigation, bankruptcy, or reorganization.</i></p>	We have never been involved in any litigation, bankruptcy or reorganization.
Minimum of 5 public sector customer references relating to the products and services within this RFP	<p><i>Provide a minimum of five (5) customer references for product and/or services of similar scope dating within the past 3 years. Please try to provide references for K12, Higher Education, City/County and State entities. Provide the entity; contact name &amp; title; city &amp; state; phone number; years serviced; description of services; and annual volume</i></p>	<p>Benjamin Franklin Charter School  Contact Chris Brooks: (623) 628-3663  LED Lighting Retrofit Project  \$115,000</p> <p>Legacy Traditional Schools  Contact Corey Kennedy: (480) 270-5438  LED Lighting Retrofit Project  \$1,215,000</p>

		<p>Math and Science Academy Contact: Ronell Wilburn: (480) 440-0816 LED Lighting/Solar TBD</p> <p>Sierra Vista Unified School District Contact Jim Torrey: (520) 227-7160 LED Lighting \$1,319,000</p> <p>Arizona State University Contact Larry Dylan: (480) 967-3348 LED Lighting Retrofit Project \$26,000</p>
Certifications in the Industry	<i>Provide a copy of all current licenses, registrations and certifications issued by federal, state and local agencies, and any other licenses, registrations or certifications from any other governmental entity with jurisdiction, allowing Respondent to perform the covered services including, but not limited to licenses, registrations or certifications. M/WBE, HUB, DVBE, small and disadvantaged business certifications and other diverse business certifications, as well as manufacturer certifications for sales and service must be included if applicable</i>	*Licenses Attached*
Company profile and capabilities	<i>What best describes your position in the distribution channel? (Manufacturer, Authorized Distributor, Value-Add Reseller, Other</i>	Authorized Distributor, Value-added reseller.
Other factors relevant to this section as submitted by the Respondent	<i>If your company is a privately held organization, please indicate if the company is owned or operated by anyone who has been convicted of a felony. If yes, a detailed explanation of the names and conviction is required.</i>	No owners or operators have been convicted of a felony.
	Provide a copy of all current licenses, registrations and certifications issued by federal, state and local agencies, and any other licenses, registrations or certifications from any other governmental entity with jurisdiction, allowing Respondent to perform the covered services. These will be provided in the space provided in Form 6. No answer is required here.	
<b>MWBE Status and/or Program Capabilities (10 Points)</b>		
MWBE status, subcontractor plan, and/or joint venture program	<i>Please indicate whether you hold any diversity certifications, including, but not limited to MWBE, SBE, DBE, DVBE, HUB, or HUBZone</i>	No

	<i>Do you currently have a diversity program in place, such as a Mentor Protégé Program or subcontractor program? If you have a diversity program, please describe it and indicate whether you plan to offer your program or partnership through Equalis Group?</i>	No
Please attach any certifications you have as part of your response to Form 6.		
Good faith efforts to involve MWBE subcontractors in response	<i>Did your company contact MWBEs or minority chambers of commerce by telephone, written correspondence, or trade associations at least one week before the due date of this RFP to provide information relevant to this opportunity and to determine whether any MWBEs were interested in subcontracting and/or joint ventures?</i>	No
Demonstrated ongoing MWBE program	<i>Outline your subcontractor strategy and efforts your organization takes to include MWBE subcontractors in future work, including but not limited to efforts to reach out to individual MWBE businesses, minority chambers of commerce, and other minority business and trade associations.</i>	When we need services, we search the MWBE directory in Justworks.com.
<b>Commitment to Service Equalis Group Members (10 Points)</b>		
Marketing plan, capability, and commitment	<i>Detail how your organization plans to market and promote this contract upon award, including how this contract will fit into your organization's current go-to-market strategy in the public sector.</i>	Many of our projects start with a lighting audit, but when participants learn of our other capabilities, they frequently request a comprehensive energy audit. We intend to market our lighting and comprehensive energy audits through our website and our call center. We intend to list Region10-ESC on our website.
	<i>Detail how your organization will train your sales force and customer service representatives on this contract to ensure that they can competently and consistently present the contract to public agency customers and answer any questions they might have concerning it.</i>	Most of our sales staff members are familiar with government procurement requirements. Adding this agreement will fit well into our existing solicitation efforts. Many are anticipating this award and using it to go back to past government agency and public education customers that were looking for a procurement vehicle to use for their lighting and electrical needs. Additional training will be needed to go over website links and information that is required to be made available to the customers in order to participate in this particular solicitation.
	<i>Acknowledge that your organization agrees to provide its company logo(s) to Region 10 ESC and Equalis Group and agrees to provide permission for reproduction of such logo in marketing communications and promotions</i>	Yes, we agree.
Ability to manage a cooperative contract	<i>Describe the capacity of your company to report monthly sales through this agreement to Equalis Group.</i>	We can provide monthly accounts reporting as required as part of our monthly accounting process.



	<i>Identify any contracts with other cooperative or government group purchasing organizations of which your company is currently a part of:</i>	We have contracts with NCPA and CES.
Commitment to supporting agencies to utilize the contract	<i>If awarded a contract, how would you approach agencies in regards to this contract? Please indicate how this would work for both new customers to your organization, as well as existing.</i>	For new customers, we would direct them to Region 10-ESC to become members, so that we can work with them utilizing Region 10-ESC's preferred pricing rates.  For existing customers, we will offer a discount for them to use the procurement.
Other factors relevant to this section as submitted by the Respondent	<i>Provide the number of sales representatives which will work on this contract and where the sales representatives are located.</i>	4 located in Arizona and Utah.



### **PROPOSAL FORM 3: CERTIFICATIONS AND LICENSES**

Provide a copy of all current licenses, registrations and certifications issued by federal, state and local agencies, and any other licenses, registrations or certifications from any other governmental entity with jurisdiction, allowing Respondent to perform the covered services including, but not limited to licenses, registrations or certifications. M/WBE, HUB, DVBE, small and disadvantaged business certifications and other diverse business certifications, as well as manufacturer certifications for sales and service must be included if applicable.

[AZ Census 2020 \(https://azcensus.gov/\)](https://azcensus.gov/)

[Visit OpenBooks \(https://openbooks.az.gov/\)](https://openbooks.az.gov/)

[Ombudsman-Citizen Aide \(https://www.azoua.gov/\)](https://www.azoua.gov/)

Get the facts on COVID-19 (<https://azdhs.gov/preparedness/epidemiology-disease-control/infectious-disease-epidemiology/index.php?view=content&view=detail>)

<https://www.azcourts.gov/>

[AZ Gov \(https://az.gov/search/\)](https://az.gov/search/)



<https://az.gov/>

**DISCLAIMER**

The data supplied below is based on your specific request(s) and is current to the best of our knowledge as of the date and time it was extracted from our data files. The information is provided without personal research or analysis. The data is subject to change on a daily basis. You may obtain additional public records related to any licensee, including discipline, complaints and non-disciplinary actions and orders, by contacting the ROC directly. If this information is required for legal purposes, you may request an affidavit or certified copies for a fee as specified in [ARS 32-1104\(A\)](https://www.azleg.gov/viewdocument?docId=1164104&title=/www.azleg.gov/ars/301104.html) (<https://www.azleg.gov/viewdocument?docId=1164104&title=/www.azleg.gov/ars/301104.html>). Please read our Standard Terms of Use at <https://azroc.com/terms> (Terms)

Please note: The company or individuals listed on this license may hold other Arizona contractor licenses. To view information, status and complaint history for the past two years on other licenses held, go to the License Inquiry page and use a "Company Name and Personnel" search by entering the name of the company or individuals listed on the license.

# DETAILS FOR AZ INSULATION & ENERGY SOLUTIONS LLC

LICENSE NUMBER ROC 301682

WEDNESDAY AUGUST 26, 2020 02:08:11 PM

## CONTRACTOR

## LICENSE

NAME / ADDRESS / PHONE

**AZ Insulation & Energy Solutions LLC**

7661 E Posada Ave  
Mesa, AZ 85212-1734  
Phone: (480) 662-2077

STATUS / ACTION

Active

CLASS & DESCRIPTION

Specialty Dual CR-40 Insulation

ENTITY TYPE

LLC

ISSUED / RENEWAL

First Issued: 2015-10-30  
Renewed Through: 2021-10-31

## QUALIFYING PARTY & PERSONNEL

The Qualifying Party listed below is associated with this license. All other persons named, if any, are associated with the company. They are not all necessarily associated with this license.

Name: Joseph Lawrence Papa  
Position: Qualifying Party

Name: Robert Maurice Ellsworth  
Position: Member

Name: Joseph Lawrence Papa  
Position: Member

## COMPLAINT INFORMATION

Complaints against this contractor are listed below. Complaints that were cancelled, resolved or settled without a corrective work order or dismissed are not included. Contact the Registrar of Contractors at 602-542-1625 or toll-free statewide at 1-877-My AZROC (1-877-692-9762) to identify the ROC office location you need to visit to view complete complaint documentation.

CLOSED CASES		
<b>0</b> Open Cases	<b>0</b> Disciplined Cases	<b>0</b> Resolved / Settled Cases

# STATE OF ARIZONA

## Office of the Registrar of Contractors

License No. ROC 319867

*This is to Certify That*

AZ Insulation & Energy Solutions LLC

DBA Tru-Life

*Having been shown to possess all the necessary qualifications, and having complied with all the requirements of the law, is by order of the Registrar of Contractors duly licensed and admitted to engage in and pursue the business of*

KB-2

**Dual Residence and Small Commercial**

*Contractor in the State of Arizona. Given my hand and the seal of the Registrar of Contractors in my office, City of Phoenix, on 05/29/2018*



DIRECTOR, ARIZONA REGISTRAR OF CONTRACTORS

# State of Idaho

Office of the Secretary of State

## CERTIFICATE OF REGISTRATION OF AZ INSULATION & ENERGY SOLUTIONS LLC

Filing Number: 4583823

I, LAWRENCE DENNEY, Secretary of State of the State of Idaho, hereby certify that an application for Foreign Registration Statement, duly executed pursuant to the provisions of the Idaho Uniform Business Organization Code, has been received in this office and is found to conform to law.

ACCORDINGLY, by virtue of the authority vested in me by law, I issue this Certificate of Registration to transact business in this State and attach hereto a duplicate of the application for such certificate.

Dated: 22 February 2022



  
Lawrence Denney  
Secretary of State

Processed by: Business Division

**Company Details**

Company Name	AZ INSULATION & ENERGY SOLUTIONS LLC	License Number	398822
Phone Number	6023205111	License Status	Active
Issue Date	06/20/2019	Expiry Date	06/30/2022
Volume	\$1000000.00 +		

**Principal Place of Business Address**

7205 SOUTHERN AVE  
STE 120

City	MESA		
State	AZ	Zip Code	85209

**QP Details**

Name	Certificate No	Classification	Attach Date	Status
<a href="#">JOEL D BAKER</a>	362280	EE98	03/10/2020	Attached

[Back to search page](#) [Back](#)

PROPOSAL FORM 4: CLEAN AIR WATER ACT

I, the Vendor, am in compliance with all applicable standards, orders or regulations issued pursuant to the Clean Air Act of 1970, as Amended (42 U.S. C. 1857 (h), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 117389 and Environmental Protection Agency Regulation, 40 CFR Part 15 as required under OMB Circular A-102, Attachment O, Paragraph 14 (1) regarding reporting violations to the grantor agency and to the United States Environment Protection Agency Assistant Administrator for the Enforcement.

Potential Vendor: AZ Insulation and Energy Solutions DBA Tru Lite

Title of Authorized Representative: Robert Ellsworth (Partner)

Mailing Address: 7205 E Southern Ave, Suite 120, Mesa, AZ 85209

Signature: DocuSigned by:  
  
E8B3C10FCD3445A...


**PROPOSAL FORM 5: DEBARMENT NOTICE**

I, the Vendor, certify that my company has not been debarred, suspended or otherwise ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension", as described in the Federal Register and Rules and Regulations.

Potential Vendor: AZ Insulation and Energy Solutions DBA Tru Lite

Title of Authorized Representative: Robert Ellsworth (Partner)

Mailing Address: 7205 E Southern Ave, Suite 120, Mesa, AZ 85209

Signature:  \_\_\_\_\_  
DocuSigned by:  
E8B3C10FCD3445A...



## PROPOSAL FORM 6: LOBBYING CERTIFICATION

Submission of this certification is a prerequisite for making or entering into this transaction and is imposed by Section 1352, Title 31, U.S. Code. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Any person who fails to file the required certification shall be subject to civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The undersigned certifies, to the best of his/her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract or cooperative agreement, the undersigned shall complete and submit Standard Form LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all covered sub-awards exceeding \$100,000 in Federal funds at all appropriate tiers and that all sub-recipients shall certify and disclose accordingly.

DocuSigned by:

*Robert Ellsworth*

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Signature of Respondent

3/9/2022

Date



## PROPOSAL FORM 7: CONTRACTOR CERTIFICATION REQUIREMENTS

### Contractor's Employment Eligibility

By entering the contract, Contractor warrants compliance with the Federal Immigration and Nationality Act (FINA), and all other federal and state immigration laws and regulations. The Contractor further warrants that it is in compliance with the various state statutes of the states it will operate this contract in.

Participating Government Entities including School Districts may request verification of compliance from any Contractor or subcontractor performing work under this Contract. These Entities reserve the right to confirm compliance in accordance with applicable laws.

Should the Participating Entities suspect or find that the Contractor or any of its subcontractors are not in compliance, they may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Contract for default, and suspension and/or debarment of the Contractor. All costs necessary to verify compliance are the responsibility of the Contractor.

The Respondent complies and maintains compliance with the appropriate statutes which requires compliance with federal immigration laws by State employers, State contractors and State subcontractors in accordance with the E-Verify Employee Eligibility Verification Program.


Contractor shall comply with governing board policy of the Region 10 ESC Participating entities in which work is being performed.

### Fingerprint & Criminal Background Checks

If required to provide services on school district property at least five (5) times during a month, contractor shall submit a full set of fingerprints to the school district if requested of each person or employee who may provide such service. Alternately, the school district may fingerprint those persons or employees. An exception to this requirement may be made as authorized in Governing Board policy. The district shall conduct a fingerprint check in accordance with the appropriate state and federal laws of all contractors, subcontractors or vendors and their employees for which fingerprints are submitted to the district. Contractor, subcontractors, vendors and their employees shall not provide services on school district properties until authorized by the District.

The Respondent shall comply with fingerprinting requirements in accordance with appropriate statutes in the state in which the work is being performed unless otherwise exempted.

Contractor shall comply with governing board policy in the school district or Participating Entity in which work is being performed.

DocuSigned by:  
  
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3/9/2022

Signature of Respondent

Date

**PROPOSAL FORM 8: ANTITRUST CERTIFICATION STATEMENTS**  
**(Tex. Government Code § 2155.005)**

I affirm under penalty of perjury of the laws of the State of Texas that:

- (1) I am duly authorized to execute this contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Company) listed below;
- (2) In connection with this proposal, neither I nor any representative of the Company has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15;
- (3) In connection with this proposal, neither I nor any representative of the Company has violated any federal antitrust law; and
- (4) Neither I nor any representative of the Company has directly or indirectly communicated any of the contents of this proposal to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.

**VENDOR AZ Insulation and Energy Solutions DBA Tru Lite**

**ADDRESS 7205 E Southern Ave, Suite 120, Mesa, AZ  
85209**

**PHONE 602-320-5111**

**FAX N/A**

**RESPONDANT**

DocuSigned by:  
*Robert Ellsworth*  
E8B3C10FCD3445A...  
Signature

Robert Ellsworth  
Printed Name

Partner  
Position with Company

**AUTHORIZING OFFICIAL**

DocuSigned by:  
*Robert Ellsworth*  
E8B3C10FCD3445A...  
Signature

Robert Ellsworth  
Printed Name

Partner  
Position with Company

## **PROPOSAL FORM 9: IMPLEMENTATION OF HOUSE BILL 1295**

### **Certificate of Interested Parties (Form 1295):**

In 2015, the Texas Legislature adopted House Bill 1295, which added section 2252.908 of the Government Code. The law states that a governmental entity or state agency may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties to the governmental entity or state agency at the time the business entity submits the signed contract to the governmental entity or state agency. The law applies only to a contract of a governmental entity or state agency that either (1) requires an action or vote by the governing body of the entity or agency before the contract may be signed or (2) has a value of at least \$1 million. The disclosure requirement applies to a contract entered into on or after January 1, 2016.

The Texas Ethics Commission was required to adopt rules necessary to implement that law, prescribe the disclosure of interested parties form, and post a copy of the form on the commission's website. The commission adopted the Certificate of Interested Parties form (Form 1295) on October 5, 2015. The commission also adopted new rules (Chapter 46) on November 30, 2015, to implement the law. The commission does not have any additional authority to enforce or interpret House Bill 1295.

### **Filing Process:**

Starting on January 1, 2016, the commission will make available on its website a new filing application that must be used to file Form 1295. A business entity must use the application to enter the required information on Form 1295 and print a copy of the completed form, which will include a certification of filing that will contain a unique certification number. An authorized agent of the business entity must sign the printed copy of the form and have the form notarized. The completed Form 1295 with the certification of filing must be filed with the governmental body or state agency with which the business entity is entering into the contract.

The governmental entity or state agency must notify the commission, using the commission's filing application, of the receipt of the filed Form 1295 with the certification of filing not later than the 30th day after the date the contract binds all parties to the contract. The commission will post the completed Form 1295 to its website within seven business days after receiving notice from the governmental entity or state agency.

Information regarding how to use the filing application will be available on this site starting on January 1, 2016. [https://www.ethics.state.tx.us/whatsnew/elf\\_info\\_form1295.htm](https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm)

**PROPOSAL FORM 10: BOYCOTT CERTIFICATION AND TERRORIST STATE CERTIFICATION**

**BOYCOTT CERTIFICATION**

Respondents must certify that during the term of any Agreement, it does not boycott Israel and will not boycott Israel. "Boycott" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made for ordinary business purposes.

Does vendor agree? <sup>DS</sup>  
RE  
(Initials of Authorized Representative)

**TERRORIST STATE CERTIFICATION**

In accordance with Texas Government Code, Chapter 2252, Subchapter F, REGION 10 ESC is prohibited from entering into a contract with a company that is identified on a list prepared and maintained by the Texas Comptroller or the State Pension Review Board under Texas Government Code Sections 806.051, 807.051, or 2252.153. By execution of any agreement, the respondent certifies to REGION 10 ESC that it is not a listed company under any of those Texas Government Code provisions. Responders must voluntarily and knowingly acknowledge and agree that any agreement shall be null and void should facts arise leading the REGION 10 ESC to believe that the respondent was a listed company at the time of this procurement.

Does vendor agree? <sup>DS</sup>  
RE  
(Initials of Authorized Representative)

**PROPOSAL FORM 11: RESIDENT CERTIFICATION**

This Certification Section must be completed and submitted before a proposal can be awarded to your company. This information may be placed in an envelope labeled "Proprietary" and is not subject to public view. In order for a proposal to be considered, the following information must be provided. Failure to complete may result in rejection of the proposal:

As defined by Texas House Bill 602, a "nonresident Bidder" means a Bidder whose principal place of business is not in Texas, but excludes a contractor whose ultimate parent company or majority owner has its principal place of business in Texas.

Texas or Non-Texas Resident

- I certify that my company is a "**resident Bidder**"
- I certify that my company qualifies as a "**nonresident Bidder**"

If you qualify as a "nonresident Bidder," you must furnish the following information:

What is your resident state? (The state your principal place of business is located.)

<b>AZ Insulation and Energy Solutions</b>	<b>7205 E Southern Ave, Suite 120</b>	
Company Name	Address	
<b>Mesa</b>	<b>AZ</b>	<b>85209</b>
City	State	Zip

**PROPOSAL FORM 12: FEDERAL FUNDS CERIFICATION FORM**

When a participating agency seeks to procure goods and services using funds under a federal grant or contract, specific federal laws, regulations, and requirements may apply in addition to those under state law. This includes, but is not limited to, the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 CFR 200 (sometimes referred to as the “Uniform Guidance” or “EDGAR” requirements). All Vendors submitting proposals must complete this Federal Funds Certification Form regarding Vendor’s willingness and ability to comply with certain requirements which may be applicable to specific participating agency purchases using federal grant funds. This completed form will be made available to participating agencies for their use while considering their purchasing options when using federal grant funds. Participating agencies may also require Vendors to enter into ancillary agreements, in addition to the contract’s general terms and conditions, to address the member’s specific contractual needs, including contract requirements for a procurement using federal grants or contracts.

**For each of the items below, Vendor should certify Vendor’s agreement and ability to comply, where applicable, by having Vendor’s authorized representative complete and initial the applicable lines after each section and sign the acknowledgment at the end of this form.** If a vendor fails to complete any item in this form, Region 10 ESC will consider the Vendor’s response to be that they are unable or unwilling to comply. A negative response to any of the items may, if applicable, impact the ability of a participating agency to purchase from the Vendor using federal funds.

**1. Vendor Violation or Breach of Contract Terms:**

Contracts for more than the simplified acquisition threshold currently set at \$150,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 USC 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

Any Contract award will be subject to Region 10 ESC General Terms and Conditions, as well as any additional terms and conditions in any Purchase Order, participating agency ancillary contract, or Member Construction Contract agreed upon by Vendor and the participating agency which must be consistent with and protect the participating agency at least to the same extent as the Region 10 ESC Terms and Conditions.

The remedies under the Contract are in addition to any other remedies that may be available under law or in equity. By submitting a Proposal, you agree to these Vendor violation and breach of contract terms.

Does vendor agree? DS  
RE  
(Initials of Authorized Representative)

**2. Termination for Cause or Convenience:**

When a participating agency expends federal funds, the participating agency reserves the right to immediately terminate any agreement in excess of \$10,000 resulting from this procurement process in the event of a breach or default of the agreement by Offeror in the event Offeror fails to: (1) meet schedules, deadlines, and/or delivery dates within the time specified in the procurement solicitation, contract, and/or a purchase order; (2) make any payments owed; or (3) otherwise perform in accordance with the contract and/or the procurement solicitation. participating agency also reserves the right to terminate the contract immediately, with written notice to offeror, for convenience, if participating agency believes, in its sole discretion that it is in the best interest of participating agency to do so. Offeror will be compensated for work performed and accepted and goods accepted by participating agency as of the termination date if the contract is terminated for convenience



of participating agency. Any award under this procurement process is not exclusive and participating agency reserves the right to purchase goods and services from other offerors when it is in participating agency's best interest.

Does vendor agree? DS  
RE  
(Initials of Authorized Representative)

**3. Equal Employment Opportunity:**

Except as otherwise provided under 41 CFR Part 60, all participating agency purchases or contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 shall be deemed to include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR Part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

The equal opportunity clause provided under 41 CFR 60-1.4(b) is hereby incorporated by reference. Vendor agrees that such provision applies to any participating agency purchase or contract that meets the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 and Vendor agrees that it shall comply with such provision.

Does vendor agree? DS  
RE  
(Initials of Authorized Representative)

**4. Davis-Bacon Act:**

When required by Federal program legislation, Vendor agrees that, for all participating agency prime construction contracts/purchases in excess of \$2,000, Vendor shall comply with the Davis-Bacon Act (40 USC 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, Vendor is required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determinate made by the Secretary of Labor. In addition, Vendor shall pay wages not less than once a week.

Current prevailing wage determinations issued by the Department of Labor are available at [www.wdol.gov](http://www.wdol.gov). Vendor agrees that, for any purchase to which this requirement applies, the award of the purchase to the Vendor is conditioned upon Vendor's acceptance of the wage determination.

Vendor further agrees that it shall also comply with the Copeland "Anti-Kickback" Act (40 USC 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled.

Does vendor agree? DS  
RE  
(Initials of Authorized Representative)

**5. Contract Work Hours and Safety Standards Act:**

Where applicable, for all participating agency contracts or purchases in excess of \$100,000 that involve the employment of mechanics or laborers, Vendor agrees to comply with 40 USC 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 USC 3702 of the Act, Vendor is required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 USC 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

Does vendor agree? <sup>DS</sup>  
RE  
(Initials of Authorized Representative)

**6. Right to Inventions Made Under a Contract or Agreement:**

If the participating agency’s Federal award meets the definition of “funding agreement” under 37 CFR 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance or experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.

Vendor agrees to comply with the above requirements when applicable.

Does vendor agree? <sup>DS</sup>  
RE  
(Initials of Authorized Representative)

**7. Clean Air Act and Federal Water Pollution Control Act:**

Clean Air Act (42 USC 7401-7671q.) and the Federal Water Pollution Control Act (33 USC 1251-1387), as amended –Contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders, or regulations issued pursuant to the Clean Air Act (42 USC 7401-7671q.) and the Federal Water Pollution Control Act, as amended (33 USC 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

When required, Vendor agrees to comply with all applicable standards, orders, or regulations issued pursuant to the Clean Air Act and the Federal Water Pollution Control Act.

Does vendor agree? <sup>DS</sup>  
RE  
(Initials of Authorized Representative)

**8. Debarment and Suspension:**



Debarment and Suspension (Executive Orders 12549 and 12689) – A contract award (see 2 CFR 180.220) must not be made to parties listed on the government-wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR Part 1966 Comp. p. 189) and 12689 (3CFR Part 1989 Comp. p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

Vendor certifies that Vendor is not currently listed on the government-wide exclusions in SAM, is not debarred, suspended, or otherwise excluded by agencies or declared ineligible under statutory or regulatory authority other than Executive Order 12549. Vendor further agrees to immediately notify the Cooperative and all participating agencies with pending purchases or seeking to purchase from Vendor if Vendor is later listed on the government-wide exclusions in SAM, or is debarred, suspended, or otherwise excluded by agencies or declared ineligible under statutory or regulatory authority other than Executive Order 12549.

Does vendor agree? DS  
RE  
(Initials of Authorized Representative)

**9. Byrd Anti-Lobbying Amendment:**

Byrd Anti-Lobbying Amendment (31 USC 1352) -- Vendors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 USC 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award. As applicable, Vendor agrees to file all certifications and disclosures required by, and otherwise comply with, the Byrd Anti-Lobbying Amendment (31 USC 1352).

Does vendor agree? DS  
RE  
(Initials of Authorized Representative)

**10. Procurement of Recovered Materials:**

For participating agency purchases utilizing Federal funds, Vendor agrees to comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act where applicable and provide such information and certifications as a participating agency may require to confirm estimates and otherwise comply. The requirements of Section 6002 include procuring only 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, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery, and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Does vendor agree? DS  
RE  
(Initials of Authorized Representative)

**11. Profit as a Separate Element of Price:**

For purchases using federal funds in excess of \$150,000, a participating agency may be required to negotiate profit as a separate element of the price. See, 2 CFR 200.323(b). When required by a participating agency, Vendor agrees to provide information and negotiate with the participating agency regarding profit as a separate element of the price for a particular purchase. However, Vendor agrees that the total price, including profit, charged by Vendor to the participating agency shall not exceed the awarded pricing, including any applicable discount, under Vendor’s Cooperative Contract.

Does vendor agree? <sup>DS</sup>  
RE  
(Initials of Authorized Representative)

**12. Prohibition on Certain Telecommunications and Video Surveillance Services or Equipment**

Vendor agrees that recipients and subrecipients are prohibited from obligating or expending loan or grant funds to procure or obtain, extend or renew a contract to procure or obtain, or enter into a contract (or extend or renew a contract) to procure or obtain equipment, services, or systems that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system from companies described in Public Law 115-232, section 889. Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of the National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country are also prohibited.

Does vendor agree? <sup>DS</sup>  
RE  
(Initials of Authorized Representative)

**13. General Compliance and Cooperation with Participating Agencies:**

In addition to the foregoing specific requirements, Vendor agrees, in accepting any Purchase Order from a participating agency, it shall make a good faith effort to work with participating agencies to provide such information and to satisfy such requirements as may apply to a particular participating agency purchase or purchases including, but not limited to, applicable recordkeeping and record retention requirements.

Does vendor agree? <sup>DS</sup>  
RE  
(Initials of Authorized Representative)

**14. Applicability to Subcontractors**

Offeror agrees that all contracts it awards pursuant to the Contract shall be bound by the foregoing terms and conditions.

Does vendor agree? <sup>DS</sup>  
RE  
(Initials of Authorized Representative)

By signature below, I certify that the information in this form is true, complete, and accurate and that I am authorized by my company to make this certification and all consents and agreements contained herein.

**AZ Insulation and Energy Solutions DBA Tru Lite**

Company Name

DocuSigned by:

*Robert Ellsworth*

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Signature of Authorized Company Official

**Robert Ellsworth**

Printed Name

**Partner**

Title

**3/9/2022**

Date

**PROPOSAL FORM 13: ADDITIONAL ARIZONA CONTRACTOR REQUIREMENTS**

**AZ Compliance with Federal and state requirements:** Contractor agrees when working on any federally assisted projects with more than \$2,000.00 in labor costs, to comply with all federal and state requirements, as well as Equal Opportunity Employment requirements and all other federal and state laws, statutes, etc. Contractor agrees to post wage rates at the work site and submit a copy of their payroll to the member for their files. Contractor must retain records for three years to allow the federal grantor agency access to these records, upon demand. Contractor also agrees to comply with the Arizona Executive Order 75-5, as amended by Executive Order 99-4.

When working on contracts funded with Federal Grant monies, contractor additionally agrees to comply with the administrative requirements for grants, and cooperative agreements to state, local and federally recognized Indian Tribal Governments.

**AZ Compliance with workforce requirements:** Pursuant to ARS 41-4401, Contractor and subcontractor(s) warrant their compliance with all federal and state immigration laws and regulations that relate to their employees, and compliance with ARS 23-214 subsection A, which states, ..."every employer, after hiring an employee, shall verify the employment eligibility of the employee through the E-Verify program" Region 10 ESC reserves the right to cancel or suspend the use of any contract for violations of immigration laws and regulations. Region 10 ESC and its members reserve the right to inspect the papers of any contractor or subcontract employee who works under this contract to ensure compliance with the warranty above.

**AZ Contractor Employee Work Eligibility:** By entering into this contract, contractor agrees and warrants compliance with A.R.S. 41-4401, A.R.S. 23-214, the Federal Immigration and Nationality Act (FINA), and all other Federal immigration laws and regulations. Region 10 ESC and/or Region 10 ESC members may request verification of compliance from any contractor or sub contractor performing work under this contract. Region 10 ESC and Region 10 ESC members reserve the right to confirm compliance. In the event that Region 10 ESC or Region 10 ESC members suspect or find that any contractor or subcontractor is not in compliance, Region 10 ESC may pursue any and all remedies allowed by law, including but not limited to suspension of work, termination of contract, suspension and/or debarment of the contractor. All cost associated with any legal action will be the responsibility of the contractor.


**AZ Non-Compliance:** All federally assisted contracts to members that exceed \$10,000.00 may be terminated by the federal grantee for noncompliance by contractor. In projects that are not federally funded, Respondent must agree to meet any federal, state or local requirements as necessary. In addition, if compliance with the federal regulations increases the contract costs beyond the agreed on costs in this solicitation, the additional costs may only apply to the portion of the work paid by the federal grantee.

**Registered Sex Offender Restrictions (Arizona):** For work to be performed at an Arizona school, contractor agrees that no employee or employee of a subcontractor who has been adjudicated to be a registered sex offender will perform work at any time when students are present, or reasonably expected to be present. Contractor agrees that a violation of this condition shall be considered a material breach and may result in the cancellation of the purchase order at the Region 10 ESC member's discretion. Contractor must identify any additional costs associated with compliance to this term. If no costs are specified, compliance with this term will be provided at no additional charge.

**Offshore Performance of Work Prohibited:** Due to security and identity protection concerns, direct services under this contract shall be performed within the borders of the United States.

**Terrorism Country Divestments:** In accordance with A.R.S. 35-392, Region 10 ESC and Region 10 ESC members are prohibited from purchasing from a company that is in violation of the Export Administration Act. By entering into the contract, contractor warrants compliance with the Export Administration Act.

The undersigned hereby accepts and agrees to comply with all statutory compliance and notice requirements listed in this document.

DocuSigned by:  
 \_\_\_\_\_ **3/9/2022**  
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Signature of Respondent

Date

**PROPOSAL FORM 14: OWNERSHIP DISCLOSURE FORM (N.J.S. 52:25-24.2)**

Pursuant to the requirements of P.L. 1999, Chapter 440 effective April 17, 2000 (Local Public Contracts Law), the Respondent shall complete the form attached to these specifications listing the persons owning 10 percent (10%) or more of the firm presenting the proposal.

**Company Name:** AZ Insulation and Energy Solutions DBA Tru Lite  
**Street** 7205 E Southern Ave, Suite 120  
**City, State, Zip Code:** Mesa, AZ 85209

**Complete as appropriate:**

I \_\_\_\_\_, certify that I am the sole owner of \_\_\_\_\_, that there are no partners and the business is not incorporated, and the provisions of N.J.S. 52:25-24.2 do not apply.

**OR:**

I Rob Ellsworth, a partner in Az Insulation and Energy Solutions, do hereby certify that the following is a list of all individual partners who own a 10% or greater interest therein. I further certify that if one (1) or more of the partners is itself a corporation or partnership, there is also set forth the names and addresses of the stockholders holding 10% or more of that corporation's stock or the individual partners owning 10% or greater interest in that partnership.

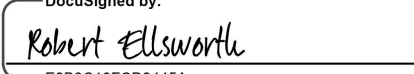
**OR:**

I Robert Ellsworth, an authorized representative of AZ Insulation and Energy Solutions DBA Tru Lite, a corporation, do hereby certify that the following is a list of the names and addresses of all stockholders in the corporation who own 10% or more of its stock of any class. I further certify that if one (1) or more of such stockholders is itself a corporation or partnership, that there is also set forth the names and addresses of the stockholders holding 10% or more of the corporation's stock or the individual partners owning a 10% or greater interest in that partnership.

**(Note: If there are no partners or stockholders owning 10% or more interest, indicate none.)**

Name	Address	Interest
Joe Papa	7829 E Plata Ave, Mesa, AZ 85212	1/2
Robert Ellsworth	11114 E Rembrandt Ave Mesa, AZ 85212	1/2

I further certify that the statements and information contained herein, are complete and correct to the best of my knowledge and belief.

DocuSigned by:  
  
 Robert Ellsworth (Partner)  
**Authorized Signature and Title**

3/9/2022  
**Date**

**PROPOSAL FORM 15: NON-COLLUSION AFFIDAVIT**

**Company Name:**

**Street:**

**City, State, Zip Code:**

*State of New Jersey*

*County of \_\_\_\_\_*

I, \_\_\_\_\_ of the \_\_\_\_\_  
Name City

*in the County of \_\_\_\_\_, State of \_\_\_\_\_ of full  
age, being duly sworn according to law on my oath depose and say that:*

I am the \_\_\_\_\_ of the firm of \_\_\_\_\_  
Title Company Name

*the Respondent making the Proposal for the goods, services or public work specified under the Harrison Township Board of Education attached proposal, and that I executed the said proposal with full authority to do so; that said Respondent has not directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free, competitive bidding in connection with the above proposal, and that all statements contained in said bid proposal and in this affidavit are true and correct, and made with full knowledge that the Harrison Township Board of Education relies upon the truth of the statements contained in said bid proposal and in the statements contained in this affidavit in awarding the contract for the said goods, services or public work.*

*I further warrant that no person or selling agency has been employed or retained to solicit or secure such contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, except bona fide employees or bona fide established commercial or selling agencies maintained by*

\_\_\_\_\_  
*Company Name*

\_\_\_\_\_  
*Authorized Signature & Title*

Subscribed and sworn before me

this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
Notary Public of New Jersey  
My commission expires \_\_\_\_\_, 20\_\_\_\_

SEAL

**PROPOSAL FORM 16: AFFIRMATIVE ACTION AFFIDAVIT (P.L. 1975, C.127)**

**Company Name:** \_\_\_\_\_

**Street:** \_\_\_\_\_

**City, State, Zip Code:** \_\_\_\_\_

**Bid Proposal Certification:**

*Indicate below your compliance with New Jersey Affirmative Action regulations. Your proposal will be accepted even if you are not in compliance at this time. No contract and/or purchase order may be issued, however, until all Affirmative Action requirements are met.*

**Required Affirmative Action Evidence:**

*Procurement, Professional & Service Contracts (Exhibit A)*

Vendors must submit with proposal:

- 1. A photo copy of their Federal Letter of Affirmative Action Plan Approval \_\_\_\_\_  
OR
- 2. A photo copy of their Certificate of Employee Information Report \_\_\_\_\_  
OR
- 3. A complete Affirmative Action Employee Information Report (AA302) \_\_\_\_\_

**Public Work – Over \$50,000 Total Project Cost:**

A. *No approved Federal or New Jersey Affirmative Action Plan. We will complete Report Form AA201-A upon receipt from the Harrison Township Board of Education* \_\_\_\_\_

B. *Approved Federal or New Jersey Plan – certificate enclosed* \_\_\_\_\_

*I further certify that the statements and information contained herein, are complete and correct to the best of my knowledge and belief.*

\_\_\_\_\_  
**Authorized Signature and Title**

\_\_\_\_\_  
**Date**

**P.L. 1995, c. 127 (N.J.A.C. 17:27)**

**MANDATORY AFFIRMATIVE ACTION LANGUAGE**

**PROCUREMENT, PROFESSIONAL AND SERVICE CONTRACTS**

During the performance of this contract, the contractor agrees as follows:

The contractor or subcontractor, where applicable, will not discriminate against any employee or applicant for employment because of age, race, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation. The contractor will take affirmative action to ensure that such applicants are recruited and employed, and that employees are treated during employment, without regard to their age, race, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation. Such action shall include, but not



be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the Public Agency Compliance Officer setting forth provisions of this non-discrimination clause.

The contractor or subcontractor, where applicable will, in all solicitations or advertisement for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to age, race, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation.

The contractor or subcontractor, where applicable, will send to each labor union or representative of workers with which it has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the agency contracting officer advising the labor union or workers' representative of the contractor's commitments under this act and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

The contractor or subcontractor, where applicable, agrees to comply with any regulations promulgated by the Treasurer pursuant to P.L. 1975, c. 127, as amended and supplemented from time to time and the Americans with Disabilities Act.

The contractor or subcontractor agrees to attempt in good faith to employ minority and female workers trade consistent with the applicable county employment goal prescribed by N.J.A.C. 17:27-5.2 promulgated by the Treasurer pursuant to P.L. 1975, C.127, as amended and supplemented from time to time or in accordance with a binding determination of the applicable county employment goals determined by the Affirmative Action Office pursuant to N.J.A.C. 17:27-5.2 promulgated by the Treasurer pursuant to P.L. 1975, C.127, as amended and supplemented from time to time.

The contractor or subcontractor agrees to inform in writing appropriate recruitment agencies in the area, including employment agencies, placement bureaus, colleges, universities, labor unions, that it does not discriminate on the basis of age, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation, and that it will discontinue the use of any recruitment agency which engages in direct or indirect discriminatory practices.

The contractor or subcontractor agrees to revise any of its testing procedures, if necessary, to assure that all personnel testing conforms with the principles of job-related testing, as established by the statutes and court decisions of the state of New Jersey and as established by applicable Federal law and applicable Federal court decisions.

The contractor or subcontractor agrees to review all procedures relating to transfer, upgrading, downgrading and lay-off to ensure that all such actions are taken without regard to age, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation, and conform with the applicable employment goals, consistent with the statutes and court decisions of the State of New Jersey, and applicable Federal law and applicable Federal court decisions.

The contractor and its subcontractors shall furnish such reports or other documents to the Affirmative Action Office as may be requested by the office from time to time in order to carry out the purposes of these

regulations, and public agencies shall furnish such information as may be requested by the Affirmative Action Office for conducting a compliance investigation pursuant to Subchapter 10 of the Administrative Code (NJAC 17:27).

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Signature of Procurement Agent

**PROPOSAL FORM 17: C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM****Public Agency Instructions**

This page provides guidance to public agencies entering into contracts with business entities that are required to file Political Contribution Disclosure forms with the agency. **It is not intended to be provided to contractors.**

What follows are instructions on the use of form local units can provide to contractors that are required to disclose political contributions pursuant to N.J.S.A. 19:44A-20.26 (P.L. 2005, c. 271, s.2). Additional information is available in Local Finance Notice 2006-1 ([https://www.nj.gov/dca/divisions/dlgs/resources/lfns\\_2006.html](https://www.nj.gov/dca/divisions/dlgs/resources/lfns_2006.html)).

1. The disclosure is required for all contracts in excess of \$17,500 that are **not awarded** pursuant to a “fair and open” process (N.J.S.A. 19:44A-20.7).
2. Due to the potential length of some contractor submissions, the public agency should consider allowing data to be submitted in electronic form (i.e., spreadsheet, pdf file, etc.). Submissions must be kept with the contract documents or in an appropriate computer file and be available for public access. **The form is worded to accept this alternate submission.** The text should be amended if electronic submission will not be allowed.
3. The submission must be **received from the contractor and** on file at least 10 days prior to award of the contract. Resolutions of award should reflect that the disclosure has been received and is on file.
4. The contractor must disclose contributions made to candidate and party committees covering a wide range of public agencies, including all public agencies that have elected officials in the county of the public agency, state legislative positions, and various state entities. The Division of Local Government Services recommends that contractors be provided a list of the affected agencies. This will assist contractors in determining the campaign and political committees of the officials and candidates affected by the disclosure.
  - a) The Division has prepared model disclosure forms for each county. They can be downloaded from the “County PCD Forms” link on the Pay-to-Play web site at [https://www.state.nj.us/dca/divisions/dlgs/programs/pay\\_2\\_play.html](https://www.state.nj.us/dca/divisions/dlgs/programs/pay_2_play.html) They will be updated from time-to-time as necessary.
  - b) A public agency using these forms **should edit them to properly reflect the correct legislative district(s)**. As the forms are county-based, **they list all legislative districts** in each county. **Districts that do not represent the public agency should be removed from the lists.**
  - c) Some contractors may find it easier to provide a single list that covers all contributions, regardless of the county. These submissions are appropriate and should be accepted.
  - d) The form may be used “as-is”, subject to edits as described herein.
  - e) The “Contractor Instructions” sheet is intended to be provided with the form. It is recommended that the Instructions and the form be printed on the same piece of paper. The form notes that the Instructions are printed on the back of the form; where that is not the case, the text should be edited accordingly.
  - f) The form is a Word document and can be edited to meet local needs, and posted for download on web sites, used as an e-mail attachment, or provided as a printed document.
5. It is recommended that the contractor also complete a “Stockholder Disclosure Certification.” This will assist the local unit in its obligation to ensure that contractor did not make any prohibited contributions to the committees listed on the Business Entity Disclosure Certification in the 12 months prior to the contract. (See Local Finance Notice 2006-7 for additional information on this obligation) A sample Certification form is part of this package and the instruction to complete it is included in the Contractor Instructions. **NOTE: This section is not applicable to Boards of Education.**

## C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM

### Contractor Instructions

Business entities (contractors) receiving contracts from a public agency that are NOT awarded pursuant to a “fair and open” process (defined at N.J.S.A. 19:44A-20.7) are subject to the provisions of P.L. 2005, c. 271, s.2 (N.J.S.A. 19:44A-20.26). This law provides that 10 days prior to the award of such a contract, the contractor shall disclose contributions to:

1. any State, county, or municipal committee of a political party
2. any legislative leadership committee\*
3. any continuing political committee (a.k.a., political action committee)
4. any candidate committee of a candidate for, or holder of, an elective office:
  1. of the public entity awarding the contract
  2. of that county in which that public entity is located
  3. of another public entity within that county
  4. or of a legislative district in which that public entity is located or, when the public entity is a county, of any legislative district which includes all or part of the county. The disclosure must list reportable contributions to any of the committees that exceed \$300 per election cycle that were made during the 12 months prior to award of the contract. See N.J.S.A. 19:44A-8 and 19:44A-16 for more details on reportable contributions.

N.J.S.A. 19:44A-20.26 itemizes the parties from whom contributions must be disclosed when a business entity is not a natural person. This includes the following:

5. individuals with an “interest” ownership or control of more than 10% of the profits or assets of a business entity or 10% of the stock in the case of a business entity that is a corporation for profit
6. all principals, partners, officers, or directors of the business entity or their spouses
7. any subsidiaries directly or indirectly controlled by the business entity
8. IRS Code Section 527 New Jersey based organizations, directly or indirectly controlled by the business entity and filing as continuing political committees, (PACs). When the business entity is a natural person, “a contribution by that person’s spouse or child, residing therewith, shall be deemed to be a contribution by the business entity.” [N.J.S.A. 19:44A-20.26(b)] The contributor must be listed on the disclosure. Any business entity that fails to comply with the disclosure provisions shall be subject to a fine imposed by ELEC in an amount to be determined by the Commission which may be based upon the amount that the business entity failed to report. The enclosed list of agencies is provided to assist the contractor in identifying those public agencies whose elected official and/or candidate campaign committees are affected by the disclosure requirement. It is the contractor’s responsibility to identify the specific committees to which contributions may have been made and need to be disclosed. The disclosed information may exceed the minimum requirement. The enclosed form, a content-consistent facsimile, or an electronic data file containing the required details (along with a signed cover sheet) may be used as the contractor’s submission and is disclosable to the public under the Open Public Records Act. The contractor must also complete the attached Stockholder Disclosure Certification. This will assist the agency in meeting its obligations under the law.

**NOTE: This section does not apply to Board of Education contracts.**

\* N.J.S.A. 19:44A-3(s): “The term “legislative leadership committee” means a committee established, authorized to be established, or designated by the President of the Senate, the Minority Leader of the Senate, the Speaker of the General Assembly or the Minority Leader of the General Assembly pursuant to section 16 of P.L.1993, c.65 (C.19:44A-10.1) for the purpose of receiving contributions and making expenditures.”

**C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM**

Required Pursuant To N.J.S.A. 19:44A-20.26

This form or its permitted facsimile must be submitted to the local unit no later than 10 days prior to the award of the contract.

**Part I – Vendor Information**

Vendor Name:			
Address:			
City:			

The undersigned being authorized to certify, hereby certifies that the submission provided herein represents compliance with the provisions of N.J.S.A. 19:44A-20.26 and as represented by the Instructions accompanying this form.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

**Part II – Contribution Disclosure**

Disclosure requirement: Pursuant to N.J.S.A. 19:44A-20.26 this disclosure must include all reportable political contributions (more than \$300 per election cycle) over the 12 months prior to submission to the committees of the government entities listed on the form provided by the local unit.

Check here if disclosure is provided in electronic form.

<b>Contributor Name</b>	<b>Recipient Name</b>	<b>Date</b>	<b>Dollar Amount</b>
			\$

Check here if the information is continued on subsequent page(s)



**List of Agencies with Elected Officials Required for Political Contribution Disclosure**

**N.J.S.A. 19:44A-20.26**

**County Name:**

State: Governor, and Legislative Leadership Committees

Legislative District #s:

State Senator and two members of the General Assembly per district.

**County:**

Freeholders

County Clerk

Sheriff

{County Executive}

Surrogate

Municipalities (Mayor and members of governing body, regardless of title):

**USERS SHOULD CREATE THEIR OWN FORM, OR DOWNLOAD FROM [WWW.NJ.GOV/DCA/LGS/P2P](http://WWW.NJ.GOV/DCA/LGS/P2P) A COUNTY-BASED, CUSTOMIZABLE FORM.**



**PROPOSAL FORM 18: STOCKHOLDER DISCLOSURE CERTIFICATION**

**Name of Business:**

I certify that the list below contains the names and home addresses of all stockholders holding 10% or more of the issued and outstanding stock of the undersigned.

OR

I certify that no one stockholder owns 10% or more of the issued and outstanding stock of the undersigned.

**Check the box that represents the type of business organization:**

Partnership

Sole Proprietorship

Limited Liability Partnership

Limited Partnership

Subchapter S Corporation


Corporation

Limited Liability Corporation

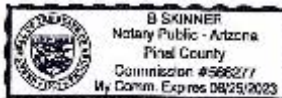
Subchapter S Corporation

Sign and notarize the form below, and, if necessary, complete the stockholder list below.

Stockholders:

Name: Robert Ellsworth Home Address: 11114 E Rembrandt Ave Mesa, AZ 85212	Name: Joe Papa Home Address: 7829 E Plata Ave. Mesa, Arizona 85212
Name: <u>N/A</u> Home Address: _____	Name: <u>N/A</u> Home Address: _____
Name: <u>N/A</u> Home Address: _____	Name: <u>N/A</u> Home Address: _____
Subscribed and sworn before me this <u>10<sup>th</sup></u> day of <u>March</u> , 20 <u>22</u> . (Notary Public) My Commission expires: <u>6-25-23</u>	 _____ (Affiant) <u>Robert M. Ellsworth, owner</u> (Print name & title of affiant)  (Corporate Seal)

State of AZ County of Maricopa  
Subscribed and sworn to (or affirmed) before me  
on this 10<sup>th</sup> day of March, 2022  
by Robert M. Ellsworth,  
proved to me on the basis of satisfactory evidence to be  
the person(s) who appeared before me.  
B. Skinner  
Notary Public Signature





**PROPOSAL FORM 19: GENERAL TERMS AND CONDITIONS ACCEPTANCE FORM**

*Signature on the Vendor Contract Signature form certifies complete acceptance of the General Terms and Conditions in this solicitation, except as noted below (additional pages may be attached, if necessary).*

**Check one of the following responses to the General Terms and Conditions:**

**We take no exceptions/deviations to the general terms and conditions**

*(Note: If none are listed below, it is understood that no exceptions/deviations are taken.)*

We take the following exceptions/deviations to the general terms and conditions. All exceptions/deviations must be clearly explained. Reference the corresponding general terms and conditions that you are taking exceptions/deviations to. Clearly state if you are adding additions terms and conditions to the general terms and conditions. Provide details on your exceptions/deviations below:

*(Note: Unacceptable exceptions shall remove your proposal from consideration for award. Region 10 ESC shall be the sole judge on the acceptance of exceptions/deviations and the decision shall be final.)*

## PROPOSAL FORM 20: EQUALIS GROUP ADMINISTRATION AGREEMENT

### Requirements for Master Agreement To be administered by Equalis Group

**Attachment A, Equalis Group Administrative Agreement** is used in administering Master Agreements with Region 10 and is preferred by Equalis Group. Redlined copies of this agreement should not be submitted with the response. Should a respondent be recommended for award, this agreement will be negotiated and executed between Equalis Group and the respondent. **Respondents must select one of the following options for submitting their response.**

- Respondent agrees to all terms and conditions outlined in each of the Administration Agreement.
- Respondent wishes to negotiate directly with Equalis Group on terms and conditions outlined in the Administration Agreement. Negotiations will commence after sealed Proposals are opened and Region 10 has determined the respondent met all requirements in their response and may be eligible for award.

**PROPOSAL FORM 21: OPEN RECORDS POLICY ACKNOWLEDGEMENT AND ACCEPTANCE**  
**OPEN RECORDS POLICY ACKNOWLEDGMENT AND ACCEPTANCE**

Be advised that all information and documents submitted will be subject to the Public Information Act requirements governed by Chapter 552 of the Texas Government Code.

Because contracts are awarded by a Texas governmental entity, all responses submitted are subject to release as public information after contracts are executed. If a Respondent believes that its response, or parts of its response, may be exempted from disclosure to the public, the Respondent must specify page-by-page and line-by-line the parts of the response, which it believes, are exempted from disclosure. In addition, the Respondent must specify which exception(s) are applicable and provide detailed reasons to substantiate the exception(s). Respondent must provide this information on the "Acknowledgement and Acceptance to Region 10 ESC's Public Information Act Policy" form found on the next page of this solicitation. Any information that is unmarked will be considered public information and released, if requested under the Public Information Act.

The determination of whether information is confidential and not subject to disclosure is the duty of the Office of Attorney General (OAG). Region 10 ESC must provide the OAG with the information requested in order for the OAG to render an opinion. In such circumstances, Respondent will be notified in writing that the material has been requested and delivered to the OAG. Respondent will have an opportunity to make arguments to the OAG in writing regarding the exception(s) to the TPIA that permit the information to be withheld from public disclosure. Respondents are advised that such arguments to the OAG must be specific and well-reasoned--vague and general claims to confidentiality by the Respondent are generally not acceptable to the OAG. Once the OAG opinion is received by Region 10 ESC, Region 10 ESC must comply with the opinions of the OAG. Region 10 ESC assumes no responsibility for asserting legal arguments on behalf of any Respondent. Respondents are advised to consult with their legal counsel concerning disclosure issues resulting from this procurement process and to take precautions to safeguard trade secrets and other proprietary information.

After completion of award, these documents will be available for public inspection.

**Signature below certifies complete acceptance of Region 10 ESC's Open Records Policy, except as noted below (additional pages may be attached, if necessary). Check one of the following responses to the Acknowledgment and Acceptance of Region 10 ESC's Open Records Policy below:**

We acknowledge Region 10 ESC's Public Information Act policy and declare that no information submitted with this proposal, or any part of our proposal, is exempt from disclosure under the Public Information Act. *(Note: All information believed to be a trade secret or proprietary must be listed below. It is further understood that failure to identify such information, in strict accordance with the instructions below, will result in that information being considered public information and released, if requested under the Public Information Act.)*

We declare the following information to be a trade secret or proprietary and exempt from disclosure under the Public Information Act. *(Note: Respondent must specify page-by-page and line-by-line the parts of the response, which it believes, are exempt. In addition, Respondent must specify which exception(s) are applicable and provide detailed reasons to substantiate the exception(s).)*

3/9/2022

Date

DocuSigned by:  
*Robert Ellsworth*  
E8B3C10FCD3445A...

**Robert Ellsworth (Partner)**  
*Authorized Signature & Title*

**PROPOSAL FORM 22: VENDOR CONTRACT AND SIGNATURE FORM**

The undersigned hereby proposes and agrees to furnish goods and/or services in strict compliance with the terms, specifications and conditions at the prices proposed within response unless noted in writing. The undersigned further certifies that he/she is an officer of the company and has authority to negotiate and bind the company named below and has not prepared this proposal in collusion with any other Respondent and that the contents of this proposal as to prices, terms or conditions of said proposal have not been communicated by the undersigned nor by any employee or agent to any person engaged in this type of business prior to the official opening of this proposal.

**VENDORS MUST SUBMIT THIS FORM COMPLETED AND SIGNED WITH THEIR RESPONSE TO BE CONSIDERED**

Company name AZ Insulation and Energy Solutions dba Tru Lite

Address 7205 E Southern Ave, Suite 120

City/State/Zip Mesa, AZ 85209

Telephone No. 602-320-5111

Fax No. N/A

Email address rob.trulite@gmail.com

Printed name Robert Ellsworth

Position with company Partner

Authorized signature DocuSigned by:  
*Robert Ellsworth*  
E8B3C10FCD3445A...

**Term of contract** March 1, 2022 to February 28, 2025

Unless otherwise stated, all contracts are for a period of three (3) years with an option to renew annually for an additional two (2) years if agreed to by Region 10 ESC. Vendor shall honor all administrative fees for any sales made based on the contract whether renewed or not.

*Dr. Jana Melsheimer*  
Jana Melsheimer (Apr 20, 2022 10:36 CDT)  
Region 10 ESC Authorized Agent

4/20/22  
Date

Dr. Jana Melsheimer  
Print Name

**Equalis Group Contract Number** R10-1133B



Did you sign the vendor contract and signature form? **If not, your Proposal will be rejected.**

Region 10 will negotiate any exceptions and both parties will agree upon which exceptions will be accepted or altered before the Region 10 board votes to accept or reject the proposals.

## Resume

Joe Papa  
7829 E Plata Ave.  
Mesa, Arizona 85212

### Summary of Qualifications

- Sold, closed and constructed over \$17,500,000 in ESCO and Solar projects in the last five years. Currently have over \$5,000,000 in pipeline projects
- 30 years of Executive Management and sales experience in Performance Contracting, Energy Conservation, Renewable Energy, Telecommunications, Governmental Administration and Business Development
- Extensive Project Management experience
- Facilitator of Engineering, Procurement, Permitting and construction processes
- Knowledgeable and experienced in Contract Administration, Intergovernmental Agreements and Environmental Reviews
- Experienced in financing public and private projects. Have secured bond, equity and debt instruments
- Served many years on Boards, Commissions and Councils
- Served on many volunteer Foundations
- Served as facilitator in large and small forums and well versed in media relations

### Summary of Experience

- Co Owner of ESCO Company, AZ Insulation and Energy Solutions
- Senior Sales Executive, Sylvania Lighting Corporation
- Senior Sales Executive, AMERESCO
- Senior Sales Executive, APS Energy Services
- CEO of Baycor Fiber LLC
- City Manager for Town of Snowflake, AZ
- Executive Director for Regional Economic Development Corporation
- Tri-State Manager for GTE

### Awards and Accomplishments

- Highest sales in the MUSH market outside of the Universities
- Awarded highest achievement for Managing Through Transition
- Achieved highest per capita increase in sales tax per year in State of Arizona for small communities several years in a row.
- Recognized by SCF for many years of managing safe work practices
- Awarded highest recognition for Economic Development achievements
- Recognized for Historic Preservation, Tourism and Commerce achievements
- Numerous awards for exemplifying teamwork and collaboration as both a professional and as a volunteer.

### Work History

3/1/2015 to present, AZ Insulation and Energy Solutions  
6/1/2014 to 3/1/2015, Sylvania Lighting Corp  
10/1/2010 to 6/1/2014, Ameresco Corp  
5/1/2009 to 10/1/2010, APS Energy Services Corp  
7/1/2006 to 5/1/2009, Baycor Fiber Corp  
3/1/2002 to 7/1/2006 White Mountain Development Corp  
6/1/1990 to 1/1/2002, City of Snowflake

**Education**

- MA University of Phoenix
- BSBA Northern Arizona University



## **Robert M. Ellsworth**

11114 E Rembrandt Ave.

Mesa, AZ 85212

[rob@az-insulation.com](mailto:rob@az-insulation.com)

602-320-5111

### **Profile**

I am a driven leader and entrepreneur. Importantly, I hold myself and others to a high standard of honesty and integrity. I love working with people and I am passionate about helping them to succeed. I am innovative and solutions oriented, and I find a way to succeed in whatever circumstance I am in.

### **Work History**

#### **Co-Owner/ Founder**

Energy X

Mesa, AZ Nov. 2018 to Present

Innovated a new model for selling solar and organized a team of executives and salesmen.

#### **Co-Owner/Founder**

AZ Insulation & Energy Solutions

Mesa, AZ Oct. 2014 to Present

Started this company to do residential and commercial insulation and other energy services.

- Took the company from \$0 - \$3.2M in sales in 4 years
- Helped develop the commercial lighting model for the business
- Assisted with Finance and Procurement for large lighting and HVAC projects

#### **Regional Sales Manager**

AAMCO Medical

Arizona Region 2012-2015

Tasked to open up a new territory. Learn/develop a model for Arizona, hire and train sales reps.

- Took sales from \$0 to over \$7M annually in 3 years.
- Consistently to top salesman in Arizona
- Hired and trained a team of 15 individuals for both sales and operations.

#### **Insulation Sales Manager**

Elite Energy Solutions

October 2011 – August 2012

Recruited, trained, and managed a sales team of 16 representatives in a door to door campaign.

- I was the top salesman in the office



- Lead the team to break all previous sales records in a very short timeframe.
- Maintained high levels of integrity as a salesman and as a sales manager.

**Other**

- **Home Security Salesman (Platinum Protection)**
- **Property Manager/ Salesman (J&G Strategic Investments)**
- **Construction Worker (SC Homebuilders)**

**Education**

High School Graduate

Utah State University

Bachelor of Science (Kinesiology)

**References**

Tyler Mickelsen

Regional Manager of Platinum Protection

435-201-1504

Breck Hughes

Owner of AAMCO Medical

801-822-9133

Chet Stevens

Owner of Elite Energy Solutions

435-253-0389

# Ashley Jones Resume

## EXPERIENCE

### **Sassy's Café and Bakery**

*Customer Service Clerk*

OCTOBER 2020 – CURRENT

Responsible for taking customer orders, payment and general customer service.

- Ensure customer satisfaction, problem solve, build customer relationships
- Run cash register, answer phones, restock merchandise
- Cheerfully interact with vendors and customers

### **Scrapbook.com**

*Fulfillment Associate*

MAY 2020 – OCTOBER 2020

Responsible for fulfilling customer orders, including picking, packing and shipping.

- Work with team to ensure order accuracy
- Identify areas for process improvements and problem solving
- Improved attention to detail when dealing with order accuracy

### **Arizona Grassroots**

*East Valley Field Staff*

JUNE 2018 – JULY 2019

Responsible for candidate and issue advocacy in the East Valley.

- Telephone based issue advocacy and surveys with Arizona residents
- Ability to pleasantly handle negative responses over the phone and in-person
- In person door to door signature collection and advocacy
- Voter registration campaign support

## **AZ Insulation and Energy Solutions**

*Office Manager*

APRIL 2021 – PRESENT

Responsible overseeing/managing business operations.

- Providing quotes for insulation services over the phone.
- Takes care of communication between technicians and customers.
- Scheduling Appointments.
- Recording all financial activity.
- Managing technicians

## **EDUCATION**

Chandler-Gilbert Community College, Mesa, Arizona

-Associates in General Business

-Expected graduation May 2022

Desert Ridge High School, Mesa, Arizona

-Graduated May 2020

NAMED INSURED: AZ INSULATION & ENERGY SOLUTIONS  
STATE: AZ  
Completed by: ROBIN PLEMMONS  
Date: 09/14/2021

POLICY NUMBER: XWS 57483168  
POLICY EFFECTIVE DATE: 09/14/2021

WORKERS COMPENSATION SCHEDULE MODIFICATION WORKSHEET

THE TOTAL SCHEDULE MODIFICATION SHALL NOT EXCEED THE MAXIMUM PERMITTED UNDER THE FILED RATING PLAN.

RISK CHARACTERISTIC	RANGE OF MODIFICATIONS		ACTUAL MODIFICATION APPLIED	REASON
	CREDIT	DEBIT		
TOTAL SCHEDULE MODIFICATION			25.0% DB	
EXPERIENCE MODIFICATION			-8% CR	

THE UNDERWRITING FILE MUST CONTAIN DOCUMENTATION SUPPORTING EACH DEBIT OR CREDIT. ALL SCHEDULE DEBITS OR CREDITS MUST BE SUPPORTED OBJECTIVELY AND APPLIED IN A NON-DISCRIMINATORY MANNER.



STUBBER

GROUP

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410

410



**Liberty Mutual Insurance**

Business Service Center  
PO Box 188065  
Fairfield, OH 45018-8065  
(800) 845-3666 Fax

March 4, 2022

AZ INSULATION & ENERGY SOLUTIONS LLC  
7661 E POSADA AVE  
MESA, AZ 85212

Policy Number: XWS57483168

To Whom It May Concern,

Please note that our Insured, AZ Insulation & Energy Solutions has an experience modification rate of .920 on his current Worker's Compensation policy. Attached is a copy of his current Declaration Pages also showing the rate.

Please contact the Liberty Mutual Service Center if you have any questions, 800-962-7132, option 5.

Thank you,

*Christine E Smith*

Christine Smith  
Service Representative  
Business Service Center

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Liberty Mutual Insurance  
Phone: 800-962-7132 | Fax: 800-345-3666



NCCI Co. No. 19291

Workers Compensation And Employers Liability Insurance Policy  
 Coverage Is Provided In:  
 Ohio Security Insurance Company

WC 00 00 01 A

Policy Number:  
**XWS (22) 57 48 31 68**  
 Prior Policy Number:  
**XWS (21) 57 48 31 68**  
 Risk ID **021134155**

**Workers Compensation and  
 Employers Liability Insurance Policy  
 Information Page**

**ITEM 1: The Insured & Mailing Address**

AZ INSULATION & ENERGY SOLUTIONS  
 LLC  
 7661 E Posada Ave  
 Mesa, AZ 85212

**Agent Mailing Address & Phone No.**

(800) 524-7024  
 AUTOMATIC DATA PROCESSING  
 INSURANCE AGENCY INC  
 1 ADP BLVD  
 ROSELAND, NJ 07068-1728

Individual  Partnership  
 Corporation or  Limited Liability Company

**FEIN:** 471743024 **NAICS:** 238310

**Other workplaces not shown above:**

**ITEM 2** The policy period is from 09/14/2021 to 09/14/2022 12:01 am Standard Time at the insured's mailing address.

**ITEM 3 A. Workers Compensation Insurance:** Part One of the policy applies to the Workers Compensation Law of the states listed here: AZ NM

**B. Employers Liability Insurance:** Part Two of the policy applies to work in each state listed in Item 3.A.  
 The limits of our liability under Part Two are:

Bodily Injury by Accident	\$1,000,000	each accident
Bodily Injury by Disease	\$1,000,000	policy limit
Bodily Injury by Disease	\$1,000,000	each employee

**C. Other States Insurance:** Part Three of the policy applies to the states, if any, listed here: See Extension of Information Page

**D. This policy includes these endorsements and schedules:** See Policy Forms and Endorsements Summary

**ITEM 4** The premium for this policy will be determined by our Manuals of Rules, Classifications, Rates and Rating Plans. All information required below is subject to verification and change by audit.

Classifications	Code No.	Premium Basis - Total Estimated Annual Remuneration	Rate per \$100 of Remuneration	Estimated Annual Premium
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See Extension of Information Page(s)

Total Estimated Annual Premium **\$4,144.00**

Total Charges **\$4,144.00**

**Minimum Premium** \$901.00 AZ Total Estimated Premium **\$4,144.00**

If indicated below, Interim adjustments of premiums shall be made.

Deposit Premium **\$1,111.00**

Issue Date 07/16/21

Countersigned by: \_\_\_\_\_

To report a claim, call your Agent or 1-844-325-2487

WC 00 00 01 A (WC 30 10 E)

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## AZ Insulation &amp; Energy Solutions dba Tru Lite

## Profit and Loss

January 2018 - December 2021

	TOTAL
<b>Income</b>	
45100 Job Income	7,070,619.06
Purchase Returns	372.19
QBO Income vs Deposits adjustment	-218,522.54
<b>Total 45100 Job Income</b>	<b>7,652,469.51</b>
Sales Discount	-450.00
Unapplied Cash Payment Income	2,900.00
<b>Total Income</b>	<b>\$7,654,919.51</b>
<b>Cost of Goods Sold</b>	
50000 Cost of Goods Sold	182.50
50800 Equipment Rental for Jobs	707.31
51400 Job Materials Purchased	2,946,974.93
52000 Other Job Related Costs	152,844.57
53600 Subcontracted Labor Expense	2,484,628.46
53700 Field and Crew Supplies	4,416.02
53800 Tools and Small Equipment	2,321.66
54100 Worker's Compensation Insurance	30,408.72
61100 Bonds	27,344.00
<b>Total 50000 Cost of Goods Sold</b>	<b>5,649,828.17</b>
<b>Total Cost of Goods Sold</b>	<b>\$5,649,828.17</b>
<b>GROSS PROFIT</b>	<b>\$2,005,091.34</b>
<b>Expenses</b>	
60100 Auto and Truck Expenses	18,929.42
60100.1 Auto Registration	108.90
60100.2 Auto Repairs & Maintenance	25,111.11
60100.3 Gas and Oil expense	81,968.27
60100.4 Parking	15.00
60100.5 Transfer Station Fees	357.66
<b>Total 60100 Auto and Truck Expenses</b>	<b>126,490.36</b>
60400 Bank Service Charges	3,449.99
61200 Business Relations	1,645.21
61300 Commissions	5,148.00
61600 Dues & Subscriptions	7,456.10
61700 Computer and Internet Expenses	7,763.57
61800 Job Supplies	11,405.10
61900 Merchant Service Fees	38,036.90
62100 Payroll Processing Fees	14,385.82
62401 Current Year Bonus Depr (deleted)	217,086.00
62402 Current Year Regular Depr (deleted)	31,643.00

## AZ Insulation &amp; Energy Solutions dba Tru Lite

## Balance Sheet

As of December 31, 2021

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
10001 Petty Cash	758.12
10002 Chase Phx (1299)	265.70
10003 Chase Bank Tucson (1873)	27.88
10004 Chase Checking (0723)	26,127.06
10005 Stripe Merchant Account	0.00
QuickDooks Checking Account	19,240.47
<b>Total Bank Accounts</b>	<b>\$46,419.23</b>
Accounts Receivable	
11000 Accounts Receivable	0.00
<b>Total Accounts Receivable</b>	<b>\$0.00</b>
Other Current Assets	
12000 Undeposited Funds	0.00
12100 Inventory Asset	3,825.87
<b>Total Other Current Assets</b>	<b>\$3,825.87</b>
<b>Total Current Assets</b>	<b>\$50,245.10</b>
Fixed Assets	
15000 FIXED ASSETS	
15200 Office Furniture & Equipment	1,800.00
15300 Construction Equipment	89,000.00
15400 Capitalized Repairs	34,941.00
15900 Vehicles & Trailers	295,631.00
<b>Total 15000 FIXED ASSETS</b>	<b>421,372.00</b>
17000 Accumulated Depreciation	-408,550.00
<b>Total Fixed Assets</b>	<b>\$12,822.00</b>
Other Assets	
19000 Goodwill	170,000.00
<b>Total Other Assets</b>	<b>\$170,000.00</b>
<b>TOTAL ASSETS</b>	<b>\$233,067.10</b>