



HABITAT FACILITIES PARTNERS

BIDDING & ONBOARDING PACKET

Thank you for your interest in partnering with Greater Fox Cities Area Habitat for Humanity, Inc. (HABITAT).

HABITAT welcomes Gift-in-Kind (GIK) contributions as part of or in place of a traditional bid. When including GIK, please show your standard fair-market price and the donated or discounted portion to accurately record and recognize your contribution. Upon request, HABITAT will provide an annual charitable contribution statement summarizing recorded GIK.

Below you'll find a summary of our ongoing RFQ process, and the required onboarding materials. HABITAT accepts contractor qualifications at any time and encourages you to submit outside of project requests.

How to Submit Onboarding Information or Bids

Contractors may submit onboarding documents and/or project bids using any of the following methods:

- **Mail:** 921 Midway Road, Menasha, WI 54952
- **Email:** constructionbids@foxcitieshabitat.org
- **In person:** During office hours (Mon–Thu 8:30 a.m.– 4:00 p.m.; Fri 8:30 a.m.– 3:00 p.m.)

Project Specifications

Bidders shall base all labor and material bids on Habitat-provided scopes of work, plans, and specifications for each Home Repair Program (HRP) project.

- In the event of conflict, permitted plans (where applicable) and Habitat specifications shall govern.
- Product substitutions of equal or better quality may be considered only with prior written approval from Habitat.

Important Note:

You may submit a project bid without completing this entire onboarding packet; however, onboarding must be completed or confirmed before any contract is awarded. These materials are provided so all potential partners understand HABITAT and applicable funding requirements.

If you wish to submit a bid with an incomplete onboarding packet, or if you are unsure whether your prior-year documents are current, please contact constructionbids@foxcitieshabitat.org.

We are happy to review your proposed bid at any time and support questions.

Thank you,

Heather Fraid

Administrative Coordinator

HeatherF@foxcitieshabitat.org

Office Phone: 920-968-7345

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ONBOARDING INFORMATION:

For purposes of this packet, the term “Contractor” is used in a general sense to include companies that provide construction labor or trade services as well as those that supply materials, products, or related services; when a requirement applies only to a particular type of work, that limitation will be stated explicitly in the packet.

Document Renewals: Only insurance coverage and Certificates of Insurance (COI) must be renewed and updated based on their expiration dates. All other onboarding documents are maintained by HABITAT once signed and generally do not require resubmission; if updates are needed in the future, HABITAT will contact you.

Procurement Procedure and Evaluation Criteria

Greater Fox Cities Habitat for Humanity (HABITAT) solicits bids for construction-related supplies and subcontracted services, making a good faith effort to include all interested vendors, with strong encouragement for women-owned and minority-owned businesses to participate. HABITAT maintains a vendor list and advertises bid opportunities through various channels and partnerships. Bids are evaluated and awarded based on cost; relevant experience; proposed technical approach; compliance with bid requirements; overall quality and clarity of the proposal; and references and past performance.

Billing & Payment: Invoices must be submitted by email to ap@foxcitieshabitat.org or mailed to Accounts Payable at 921 Midway Road in Menasha, Wisconsin. All invoices must include a unique invoice number, the project address (which serves as the purchase order number), an itemized description of goods, services, delivery, or installation, and confirmation that all work or materials have been completed, delivered, installed, or accepted by HABITAT. Properly documented invoices will be paid within thirty days of receipt.

Availability: The contractor must be available at the times specified on the building schedule to complete work in a timely manner, as communicated by Greater Fox Cities Area Habitat for Humanity (HABITAT). Any delays or back orders need to be communicated promptly.

Warranties: The contractor agrees to provide and support applicable manufacturer or product warranties.

Volunteers: The contractor should be aware that volunteers may be present on the job site at various times. HABITAT aims to schedule only a limited number of volunteers to minimize interference.

Licensing: The contractor must hold and provide proof of all required licenses from the State of Wisconsin and any applicable trade licenses.

Ethics & Conduct: By submitting a bid, the Contractor agrees to comply with the Habitat for Humanity Ethics Covenant. This covenant is included in the bid packet and becomes a binding part of any contract awarded.

Contractor Status: The Contractor and any individuals employed by the Contractor are not employees of Greater Fox Cities Area Habitat for Humanity. Contractors are treated as independent entities and are solely responsible for any and all subjects related to their organization’s operations. HABITAT will not withhold income taxes, social security taxes, or other statutory deductions. Contractors are not eligible for employee benefits such as sick leave, vacation, pension contributions, medical insurance, life insurance, or unemployment compensation.

Cause or Convenience: If the Contractor fails to deliver goods or services in accordance with the specifications contained in the bid documents or fails to meet required deadlines, HABITAT reserves the right to cancel the contract for cause and award the work to the next most qualified bidder. The Contractor in default may be held liable for any additional costs incurred by HABITAT because of the cancellation. HABITAT also reserves the right



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to cancel the contract at its convenience without cause.

Indemnity: If awarded the bid, the Contractor agrees to defend, indemnify, and hold harmless Greater Fox Cities Area Habitat for Humanity from any liabilities, claims, judgments, damages, costs, losses, fees, or expenses arising out of or resulting from work performed under the contract. This includes claims related to bodily injury, sickness, disease, death, or damage to or destruction of property, regardless of cause, except where such claims arise solely from the gross negligence or willful misconduct of HABITAT.

IRS Form W-9: A valid IRS Form W-9 must be completed and on file before any payments are made to the Contractor.

Sales Tax Exemption: Greater Fox Cities Area Habitat for Humanity is exempt from Wisconsin state sales tax. Contractors who require a Wisconsin Sales and Use Tax Exemption Certificate (Form S-211) may request one from HABITAT.

Insurance Requirements: The Contractor must submit current Certificate of Insurance (COI) with its proposal and must maintain all required coverage for the full term of the contract. The COI must list Greater Fox Cities Area Habitat for Humanity (HABITAT) as an Additional Insured on all applicable liability policies, and this status must be clearly indicated on the certificate.

The Contractor must carry commercial general liability insurance with a minimum limit of \$250,000 per occurrence, maintain automobile liability insurance with proof of active coverage, and carry workers' compensation insurance if the Contractor has three or more employees.

All insurance policies and the COI must include an endorsement requiring at least ten (10) days' written notice to HABITAT in the event of cancellation, non-renewal, or material reduction of coverage. Upon receiving such notice, the Contractor must immediately suspend operations and may not resume work until compliant coverage is reinstated and updated proof of insurance is provided.

Upon award of a contract, the Contractor must provide documentation (COI and endorsements) confirming HABITAT's status as an Additional Insured. Questions related to insurance should be directed to constructionbids@foxcireshabitat.org.

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Required Forms: The following pages contain the required forms we ask to be completed and submitted. These forms are mandatory prior to any contract award. Our intent is to ensure partners are fully informed of the requirements associated with working with Greater Fox Cities Area Habitat for Humanity (HABITAT).

Because HABITAT projects often use a mix of private, state, and federal funding, all contractors must complete the federal compliance forms in this packet as part of onboarding. This ensures you are already eligible if a project includes public funds. When additional federal or state requirements apply, HABITAT will provide written information about those obligations in advance and will not retroactively apply new requirements to completed work.

Most of the information requested in these forms—such as insurance, licensure, and basic business details—is already part of your standard documentation. Some federal compliance forms may ask for additional certifications (for example, debarment, lobbying, or affirmative action status), and we are always happy to answer questions about these requirements or why they are needed.

Greater Fox Cities Habitat for Humanity Forms:

- ☐ Contractor Checklist & Disclosure Form
- ☐ Ethics and Conduct
- ☐ Proof of valid licensure from the State of Wisconsin (if applicable)
- ☐ Certificate of Insurance (COI) meeting all requirements
- ☐ Form W-9



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Contractor Checklist & Disclosure Form

Company Name: _____

Company Address: _____

City: _____ State: _____ Zip: _____

EIN (Corporate ID #): _____

WI Business License #: _____

Primary Contact Name(s): _____

Primary Contact Phone(s): _____

Primary Contact Email(s): _____

Billing Contact Name(s): _____

Billing Contact Phone(s): _____

Billing Contact Email(s): _____

QUESTION	YES	NO
Do you have your own tools and equipment to do this job?	☐	☐
Do you have employees?	☐	☐
Do you have Workers' Compensation insurance?	☐	☐
Are your employees on our job sites covered by your Workers' Compensation insurance?	☐	☐
Do you send invoices?	☐	☐
Do you send monthly statements?	☐	☐
Does your business assume financial responsibility for defective workmanship?	☐	☐
Are you a minority-owned or women-owned business?	☐	☐
Do you have a relationship with any Habitat staff or Board member that may create a conflict of interest? If yes, please describe below.	☐	☐

Conflict of Interest Disclosure (if applicable):

Printed Name: _____ Title: _____

Signature: _____ Date: _____

Business Name: _____

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ETHICS & CONDUCT

We intentionally seek business partners, clients, customers, contractors, vendors, and suppliers who share our commitment to ethical conduct. These expectations outline the minimum standards for all Suppliers working with Habitat for Humanity.

BUSINESS ETHICS: Habitat for Humanity complies with all applicable federal, state, and local laws (including Job Safety & Health, Equal Employment Opportunity, Fair Labor Standards, and Environmental laws). We expect Suppliers to do the same and to maintain business ethics policies that apply to their own employees and subcontractors.

ENVIRONMENTAL PROTECTION: Suppliers must comply with all environmental laws and regulations and maintain procedures to notify local authorities in the event of an environmental incident related to their operations.

QUALITY ASSURANCE: Habitat for Humanity maintains quality through internal and external feedback and customer sign-off on projects. We reserve the right to inspect all goods and shipments and to reject any that are damaged, defective, or do not meet our standards. When items are rejected, the Supplier is responsible for all inbound and outbound freight plus handling charges incurred by Habitat for Humanity.

CORRECTIVE ACTION: If violations are found, Habitat for Humanity and the Supplier will agree on a corrective action plan with timely resolution. If a Supplier is knowingly and/or repeatedly in violation of this Ethics & Conduct Covenant, Habitat for Humanity may impose chargebacks, cancel orders, and/or terminate the business relationship.

GIFTS & GRATUITY POLICY: To avoid conflicts of interest, employees may not accept gifts or entertainment from any Habitat for Humanity customer, supplier, or other business partner unless the gift is sent to the workplace (not the employee's home), is occasional, and is valued at no more than \$50 or, if valued at more than \$50, is placed in a team or common area for others to share (e.g., fruit baskets, candy), and meals and other business entertainment are held to the same standard of being modest, infrequent, and as reciprocal as reasonably possible.

CONFIDENTIALITY: During the business relationship, Habitat for Humanity and the Supplier may share confidential or proprietary information with one another. "Confidential Information" includes non-public technical, financial, operational, customer, supplier, and business information in any form (oral, written, graphic, or electronic) that is marked confidential, is reasonably understood to be confidential, or is proprietary in nature.

Both parties agree that, during their relationship and after it ends, the recipient will not use or disclose the other party's Confidential Information for any purpose other than the intended business relationship, unless they have prior written consent. This obligation does not apply to information that:

- Was already in the recipient's possession from a source with no duty of confidentiality;
- Becomes publicly available through no fault of the recipient; or
- It is later received from another source with no duty of confidentiality to the disclosing party.

Reporting a Concern: We encourage business partners to ask questions, and report concerns about possible violations of this Ethics & Conduct Covenant. Reports may be made anonymously or by name. All reports will be taken seriously and investigated thoroughly. To ask a question or report a concern, email ethics@foxcitieshabitat.org

I have read and understand the Ethics & Conduct expectations.

Printed Name: _____ Title: _____

Signature: _____ Date: _____

Business Name: _____