

2016 SOLARIZE MASSACHUSETTS PROGRAM

Request for Proposals for Installers of Small-Scale Solar Photovoltaic Systems

RFP ID:

Posting Date: June 1, 2016

1. OPPORTUNITY SUMMARY

Medfield is releasing a request for proposals (“RFP”) from solar photovoltaic (“PV”) installers (“Installer(s)”) to participate in the 2016 Solarize Massachusetts Program (“Solarize Mass” or the “Program”), a Program run in partnership with the Massachusetts Clean Energy Center (“MassCEC”) and the Department of Energy Resources (“DOER”). This program will drive community adoption of solar photovoltaic (PV) projects through group purchasing model that includes a tailored community-based marketing effort within Medfield.

Solarize Mass Medfield seeks proposals from Installers that can provide residential and small-scale commercial¹ solar PV installations under both direct purchase and third-party ownership models. It is expected that customers who purchase a system under the program will receive competitive tiered pricing that results in a reduction in the total system purchase price as more people contract for solar PV in the Community are signed. Customers that enter into Power Purchase Agreements (PPAs) or leases will receive a greater financial incentive from the installer as higher tiers of aggregate capacity are reached. Quality of the installer proposal, proposed equipment, proposed pricing, ability to partner with the community, previous performance providing similar services, installation practices, and reference checks will be factors in the selection process.

Proposals must be received by **June 13, 2016 at 23:59 EDT**. Late proposals will not be accepted. Proposals shall be submitted via email and sent to solarizemedfield@gmail.com “2016 Solarize Massachusetts Installer Proposal” must appear in the subject line of the email submission.

2. PROGRAM OVERVIEW, SELECTION AND GOALS

Program Description and Goals

Solarize Mass Medfield is led by municipal officials, local volunteers, MassCEC, DOER and a competitively selected installer to implement a solar aggregation and education program on behalf of the community. Solarize Mass Medfield has developed the following goals for the program:

¹ Residential and small-scale commercial projects are the primary focus of Solarize Mass. Commercial projects over 15 kW generally fall outside the scope of the program, but installers may choose to count them toward the community’s total contracted capacity or tiered pricing. Please note larger commercial projects will not be the focus of the campaign’s marketing and outreach.

- Increase education and awareness of solar PV
- Reduce costs associated with solar PV
- Increase local adoption of solar PV
- Educate participants about reducing energy consumption with conservation measures

These goals will be accomplished through a number of activities. In particular, price reductions will be achieved through economies of scale by aggregation of solar PV projects, and by reducing customer acquisition costs -- including advertising and customer education -- which can be a significant portion of the total cost of a solar PV system. By educating the local community, streamlining marketing efforts, and aggregating sales, Solarize Mass Medfield will help make solar PV more accessible and affordable for local residents and businesses.

Roles and Responsibilities

The Solarize Mass Medfield program will be a partnership that includes a number of organizations and individuals that will work closely in order to provide a high-quality, streamlined customer experience for residents and businesses in Medfield. The following table provides a brief overview of the expected roles and responsibilities of organizations under Solarize Mass Medfield.

MassCEC & DOER	<ul style="list-style-type: none"> ● Competitively select Solarize communities ● Provide technical consultant support for Solarize Medfield ● Provide marketing and education grants and materials to communities
Medfield	<ul style="list-style-type: none"> ● Installer selection ● Volunteer support for outreach and education ● Community Solar Coach coordinates community volunteers
Installer	<ul style="list-style-type: none"> ● Provides free site assessments ● Customer service and follow-up ● Offers system pricing based on Solarize Medfield pricing ● Provides turnkey system installation
Homeowners	<ul style="list-style-type: none"> ● Contract with installers for solar installations ● Encourage others to explore going solar

3. INSTALLER SCOPE OF WORK

Installers selected for the 2016 Solarize Massachusetts Program will have primary responsibility for managing leads, performing site assessments, providing general customer service, contracting, installing, and all other functions typically associated with the sales and installation process. Installers will also play an integral role in public outreach and educational events coordinated under Solarize Mass Medfield.

Once selected, the installer will work with the Solarize Mass Medfield representatives to finalize a marketing strategy specific to the community. Shortly thereafter, the installer will participate in a Meet the Installer presentation, where the installer will be introduced to the Community. Installers are encouraged to provide additional training for the Community Solar Coach -- the lead volunteer coordinating the program -- on the installer's operations or other relevant topics.

As leads are identified during the outreach process, the installer will provide site assessments (as appropriate) and system designs for individual solar PV projects. The site assessment will evaluate a site's suitability for solar PV, including shading, onsite load, and any electrical, structural, or mechanical issues that may increase the price of the solar PV project relative to the baseline proposed price. The installer will be required to offer price proposals to potential program participants that include a detailed breakdown of any price adders that are in addition to the base pricing, clearly demonstrating that the customer is receiving pricing consistent with the Solarize Mass Medfield- installer contract.

All projects MUST meet the requirements outlined in the Solarize Mass Program Minimum Technical Requirements (MTR). See www.Solarizemass.com for more information regarding these requirements.

Below are proposed additional technical requirements. In Section 6 an addendum is specified for installers to comment on the MTR and on these requirements:

3-1. In systems without optimizers or micro inverters, each string of series connected modules connected to each MPPT of an inverter should have the same number of panels with the same orientation and shading.

3-2. Exposed outdoor rated conductors can be used within the footprint of the rooftop array in compliance with NEC. The Installer shall provide an option to use Galvanized Rigid Steel Conduit (GRC) Per direction of the Medfield Electrical Inspector, PVC conduit is not acceptable on any roof surface. Excess cable should be tied into neat coils secured to the racking, in addition to compliance with NEC 334.30.

3-3. A means for manual (not automatic) remote web based monitoring to the level of each MPPT point, ranging from overall system to per module (for micro inverter or optimizer systems), should be an additional option negotiated with individual residents.

Upon contracting, the installer will be responsible for providing each customer with a turnkey service, which includes securing all local permits, and completing the project within one year of contract signing. In addition, the installer will be expected to provide information regarding net metering, the sale of SRECs, and any other federal or state incentives available to the customer. Any costs or application fees associated with utility interconnection, net metering, or SREC sales should be negotiated between the installer and the customer.

The installer must identify a process for handling leads that have non-feasible sites for solar PV. Examples may include offering individuals with non-feasible sites more information on other technology options, such as energy efficiency or solar hot water, or requesting potential assistance in any Solarize Massachusetts volunteer opportunities.

The Installer **must** explain when and how earlier Solarize Mass Medfield participant’s payment structures will be adjusted each time a tier threshold is reached.

The installer will also provide to the community representatives with weekly data as requested, including but not limited to, the number of community initial interest contacts, number of site visits completed, number of feasible sites, number of signed contracts, and contracted capacity. The selected installer will also participate in a bi-weekly project management calls and will agree to share all communication email lists.

The installer will be required to provide the Community and MassCEC with a final report outlining the total number of contracted customers within the community and the resulting prices that will be associated with each installation.

The installer **must**, upon completion of the program, provide to Solarize Mass Medfield a spreadsheet that includes as a minimum: a list of the connection date, address, DC kW, number of panels, mount type, adders, and total cost of each installation.

4. EXPECTED TIMELINE

A preliminary timeline for the Solarize Medfield program is outlined below. **Please note that this is an estimated timeline and dates are subject to change.**

2016 Solarize Massachusetts Schedule	Tentative Timeline
RFP for Solar Installers Released	June 1, 2016
Installer Proposals Due	June 13, 2016 at 23:59 EDT
Threshold review of Installer Proposals	June 17, 2016
Community-Installer Interview Day	June 22, 2016
Announce Selected Solar PV Installers	June 27, 2016
Outreach Strategy Development with Installer	July-August
Customer Sign-Up Period Begins	July 1, 2016
Customer Sign-Up Period Ends	November 28, 2016

5. INSTALLER SELECTION PROCESS

Upon receipt of all installer proposals, Medfield will perform a threshold review to verify that all proposals are complete. Installer proposals that are received after the RFP submittal deadline will not be accepted. Proposals will be evaluated individually by a designated Technical Consultant and the Community Review Team.²

The Community Review team will be responsible for reviewing installer proposals (along with a Technical Consultant) and initially selecting high-ranking installers who will be invited to interview with Solarize Mass Medfield representatives. Interviews will be conducted during June 2016. At the completion of interviews, the Community Review Team, with the assistance of the Technical Consultant, will select their preferred installer. Medfield will then contract with the selected installer and begin the implementation of the program.

6. PROPOSAL REQUIREMENTS

Medfield, at its sole discretion, may determine whether a proposal is complete. The proposal must be in electronic form and should be submitted to solarizemedfield@gmail.com. Please note that Medfield will not accept electronic signatures, unless validated by a third party service such as DocuSign, EchoSign, or other service. "2016 Solarize Massachusetts Installer Proposal" must appear in the email subject line.

In order for an installer to be eligible to submit a proposal, the installer must:

1. Demonstrate experience and proficiency in solar PV installations. The installer must have installed a minimum of twenty-five (25) solar PV installations with a minimum size of 4kW.
2. Be, at minimum, a professional contractor licensed to conduct business in Massachusetts.
3. Include on the project team at least one electrician holding a valid and current Massachusetts electrical license enabling them to perform any electrical work on the solar PV projects.
4. Submit a proposal that meets all of the threshold review criteria outlined in section 7 below before the proposal deadline.
5. The installer must be listed in the Mass Solar Loan Expedited Installer's list at: <http://files.masscec.com/solar7loan/MSLInstallerList.pdf>

An Installer proposal must include the following:

- Attach a completed *Proposal Checklist and Application Form*
- **Attachment A:** Pricing Contingencies / Cost Adders

² No member of the External Review team can be affiliated (either directly employed or contracted for employment) with a solar PV installation company.

- **Attachment B:** Review the draft *COMMUNITY – Installer Contract Template*, and provide any comments (if applicable)
- **Attachment C:** Review the draft MassCEC – Installer Terms and Conditions draft, and provide any comments
- **Addendum 1:** A template contract for a direct purchase project, a contract for a Lease/PPA option (if applicable), and contract language for a project receiving financing option (if applicable).
- **Addendum 2:** Example marketing documents that may be provided to residential customers
- **Addendum 3:** Example email communication template, or if applicable, materials that would be provided to residents who are determined not to have a feasible site for solar
- **Addendum 4:** Resumes, licenses, or certifications (if pertinent) of key members of the installer team
- **Addendum 5:** Proposed equipment specification sheets

In order to streamline the proposal review process, additional documentation provided beyond the attachments and addendums listed above will not be reviewed by Community Review Team. In the event of a public records request, certain elements of the proposals will be deemed confidential. Please see section 3 for more information.

Once a proposal has been submitted, the installer should not contact any Solarize Medfield program volunteers, the Community Solar Coach, or the Municipal Representative of the participating Community. If it is determined that an installer has made contact with members of the community volunteer team after submitting a proposal (outside of the formal RFP review process), the installer’s proposal may be deemed invalid.

Components of Proposal Checklist and Application Template Components

- I. **Installer Primary Point of Contact**
- II. **Proposed Company Partners/Team:** Contact information for any partner organizations
- III. **Proposed Equipment:** Identify specifications for equipment that will be used for projects going through the Program, including equipment manufacturer, model, warranties for equipment, inverters, racking, meters, and data acquisition systems, if applicable. MassCEC and the selected Communities are interested in high quality as well as cost competitive equipment.
- IV. **Proposed Services:** Clarify service-specific questions related to site assessments and installation, contracts, and site-specific services. Describe how the installer will provide the paperwork and communication necessary to set up the owner’s CEC/DOER and aggregator accounts for SREC reporting.
- V. **Installer Pricing Proposal:** Clarify pricing for direct purchase systems, as well as lease/PPA systems (if applicable). Outline the tiered Purchase Price, the Lease/PPA Price (if offered), and the Lease/PPA financial incentive (if third-party ownership is offered). The pricing should be based on the total capacity (DC @STC) of solar PV contracted using the following five tiers:

Tier 1	Tier 2	Tier 3	Tier 4	Tier 5
1kW – 25kW	>25kW – 50kW	>50kW – 100kW	>100kW – 200kW	200kW +

- **Purchase Price Requirements:** As total contracted capacity increases by tier, the installer’s proposed price per watt (\$/W) must decrease for customers that purchase a system under the program.
- **Lease/PPA Price Requirements (if offered):** Installers proposing a \$/kWh Lease/PPA Price for customers that sign a third-party ownership contract, must note an additional financial incentive as higher tiers of total contracted capacity within the community are reached. The financial incentive can include, though is not limited to, a rebate, gift card, or other financial incentive. For example, if an installer is offering a financial incentive at each tier for Lease/PPA customers, as higher tiers are reached, the Lease/PPA customers would receive a financial incentive(s) rather than a \$/kWh base tier price reduction.

Clearly indicate if money is required up front by the customer for the Lease/PPA offering, if there is a pricing escalator, and how the pricing will change for sites of various solar access.

- **Financing Options:** Installers are also welcome to provide financing mechanisms for customers under the Program, including loans, payment plans, or other mechanisms.

Pricing should include total installation costs, which includes system design, permitting, applicable materials and equipment, transportation, labor, a stamped structural letter, and all equipment and workmanship warranties. The price should be independent of any tax credits or incentives available to the customers. Alternative pricing structures or financial models will be evaluated as appropriate.

- VI. Expected High-Use Pricing Contingencies / Cost Adders:** For costs that are over and above the base tier pricing, the installer must list any cost adders that are expected to be utilized for more than twenty five (25) percent of contracted projects. Common cost adders may include automatic reporting to the Production Tracking System, use of micro-inverters or DC optimizer technology (if not part of base pricing), GRC conduit and others. Installers should note common cost adders, and clarify the expected percent of systems that a cost adder may be applied.

- VII. Executive Summary:** The Executive Summary should identify why the installer is applying to the Solarize Mass Medfield RFP, and summarize the highlights, key features and distinguishing points of the proposal, as well as any unique challenges identified by the Installer, along with proposed solutions.
- VIII. Company Information:** Describe the installer company, including company size, financial stability, location, capacity for work, and access to various supply chains. Highlight relevant experience, skills and capabilities that would benefit Solarize Medfield, including, but not limited to, demonstrated experience through the sale and installation of solar PV projects in Massachusetts. The installer should provide references for a minimum of ten (10) of its projects within the commonwealth.
- IX. Installer Team Members and Partners:** Identify all members of the project team, including but not limited to, partners assisting in financing, customer service, outreach, project installations, and SREC aggregation or brokerage. For each partner entity, provide a description of their role in the program and a brief description of the installer's previous experience with that organization. Include an organization chart (if not submitting a team diagram in the following section) outlining the various key individuals and partners, with a description of each. Note that installers are welcome to multi-installer partnerships; however one installer must be the lead company on the proposal.

Application Narrative:

- X. Marketing Strategy:** Building off the existing Community marketing plan, outline a marketing plan that would be used to motivate residents to contract for solar PV under the program. Be sure to include information regarding how the installer and Community representatives will work together to implement the marketing strategy. This section should also clarify any previous experience the installer has with residential sales outreach efforts.
- XI. Program Operations Plan:** Describe a plan to provide highly-responsive customer service under the Solarize Mass Medfield program including timely lead contact, site assessments, installation services, and SREC aggregation. This operations plan should include:
- **Timeline:** Provide an expected timeline for the average residential lead under the program, from initial contact to contracting, to installation.
 - **Proposal for sites that are not feasible for solar PV:** Outline the process by which the installer team will handle leads that do not have feasible sites for solar PV. Offer example documentation or email templates of what a resident with a non-feasible site would receive. Describe whether a customer (even with a feasible site for solar PV) might be assisted in other renewable energy or energy

efficiency efforts. For example this may include solar hot water, additional thermal technologies, weatherization, or other energy related efforts.

- **Geographic Proximity:** Provide a plan to address the installer's geographic proximity to Medfield and how this will affect the services provided.

XII. Installer Group Proposal: If applicable, demonstrate the benefit of responding to the RFP as a group. This should include information about any previous history of partnering and how communication, marketing, and outreach efforts will be coordinated.

Attachment A: Pricing Contingencies / Cost Adders Components

It is understood that features of certain installations will result in higher costs. Installers must outline specific electrical, mechanical, structural, equipment, site, or labor features that will result in greater costs on the *Adder Form* (Attachment A). In addition, installers must identify a maximum Purchase Price or Lease/PPA Price associated with more complicated installations and understand that an individual project price cannot exceed the base price (at a given capacity tier) plus the additional price. Adders should be listed as a \$/watt cost for purchased projects, and a \$/kWh cost for Leased/PPA projects. If applicable, installers may also list an adder as a flat cost for purchased projects. Installers will be responsible for identifying individual projects that trigger additional pricing and will submit appropriate documentation to MassCEC for tracking purposes.

Addendum Components

Addendum 1: Provide a copy of the standard agreement for purchase projects, as well as the standard agreement for Lease or PPA projects (if applicable). The agreements should outline all of the terms and conditions for a customer under the program. For Lease or PPA offerings, the installer should clearly identify any criteria in which a price escalator may be present for customers, and include a maximum range for the price escalator.

Addendum 2: Provide example marketing documents that could be provided to residential customers.

Addendum 3: Attach resumes, licenses, or certifications (if pertinent) of key members of the Installer team.

Addendum 4: Attach proposed equipment specification sheets.

Addendum 5: Provide an example email communication template or (if applicable) materials that would be provided to residents who are determined not to have a feasible site

7. EVALUATION CRITERIA

All proposals must meet program objectives and must be responsive to the relevant scope of work and application requirements outlined above. Proposals will be evaluated on the general criteria below:

- **Threshold Requirements:** Proposals must meet a threshold review before they will be provided to the Community External Review Team. To meet the threshold review, the following criteria must be met:
 - Complete proposal and attachments must be received by Medfield before the RFP submittal deadline. Proposals received after the deadline will not be accepted;
 - Installer has installed at least 10 solar PV projects in Massachusetts;
 - The proposed Purchase Price to the customer **must** decrease by each of the five tiers. If a PPA/Lease is offered, there must be a Lease/PPA financial incentive available as higher tiers are reached.

Once an installer proposal passes threshold review, it will be evaluated by the corresponding Community Review Team and Technical Consultant based on the following criteria:

- **Overall quality and value:** overall quality of proposal and partnership potential with Solarize Mass Medfield;
- **Experience:** degree of installer's experience and proficiency in the scope of work, including demonstrated experience in developing, designing and installing small-scale solar PV systems. In addition, experience of installer team in outreach activities;
- **Marketing plan:** ability of proposal to drive community adoption of solar PV projects and reduce prices of small-scale PV installations;
- **Implementation:** ability to provide timely, quality customer service and installations as well as ability to communicate and work in partnership with the chosen Solarize Medfield;
- **Price structure:** quality and simplicity of pricing proposal for Purchase Price (\$/kW) and if applicable, Lease/PPA Price (\$/kWh) or financial incentive. In addition, the value offered by the proposed equipment, price adders, price escalators, and contract terms and conditions;
- **Demonstration of innovative concepts:** additional consideration will be given to installers that can provide innovative business models, or have options for other technologies such as Solar Hot Water and energy efficiency.

8. ANTICIPATED TERM OF CONTRACT:

Installers will be required to contract with the Town of Medfield. It is essential, in order to meet the program goals and timelines, that installers are prepared to execute a contract with Medfield soon after their selection. Therefore, each applicant installer must review the Terms and Conditions outlined in the *Draft Medfield-Installer Contract* (Attachment B) and provide comments on those Terms and Conditions at the time of application. Medfield's selection of an installer pursuant to this RFP does not mean that Medfield accepts all aspects of the proposal, modifications to which may be requested and agreed to during contract negotiations.

Medfield anticipates that the term of the contract with each installer will commence in **June 2016** and continue for one year after the last system is contracted under the program.

9. QUESTIONS AND CONTACT INFORMATION

Please submit all questions to solarizemedfield@gmail.com

10. NOTICE OF PUBLIC DISCLOSURE

As a public entity, Medfield is subject to Massachusetts' Public Records Law, codified at Chapter 66 of the Massachusetts General Laws. Thus, any documentary material, data, or other information received by MassCEC or Medfield from an applicant is a public record subject to disclosure. Materials that fall under certain categories, however, may be exempt from public disclosure under a statutory or common law exemption, including the limited exemption at Massachusetts General Laws Chapter 23J, Section 2(k) regarding confidential information submitted to MassCEC by an applicant for any form of assistance.

MassCEC and Medfield considers the following information to be confidential and may be redacted if MassCEC and/or Medfield receives a public records request:

- a. Individual cost adders and associated prices (note that the aggregate adder pricing will be made available for the sub-categories outlined in Attachment A).
- b. Template standard agreements for purchase projects, Lease/PPA projects, or financing.
- c. Licenses or certifications of key members of the installer team.
- d. Installer Proposal Checklist and Application Form: *Section 9. Company Information* and *Section 11. Marketing Strategy* sections.

11. CONTRACTUAL REQUIREMENTS

Upon the selection of a proposal, the Town of Medfield and the selected Installer will execute a contract, which will set forth the respective roles and responsibilities of the parties. See Attachment B for a draft version of this contract.

12. COMMUNITY MARKETING AND OUTREACH PLANS

MassCEC has posted the marketing and outreach sections of Medfield marketing plan, which can be found at www.masscec.com/installer-resources-solarize-massachusetts. Installers are welcome to review for more information on their proposed marketing and outreach plans for the 2016 Solarize Mass program.

13. WAIVER AUTHORITY

Medfield reserves the right, at its sole discretion, to waive minor irregularities in submittal requirements, to modify the anticipated timeline, to request modifications of the application, to accept or reject any or all applications received, and/or to cancel all or part of this RFP at any time prior to awards.

14. DISCLAIMER

This RFP does not commit Medfield to award any funds, pay any costs incurred in preparing an application, or procure or contract for services or supplies. Medfield reserves the right to accept or reject any or all applications received, cancel or modify the RFP in part or in its entirety, or change the application guidelines, when it is in its best interests.