

# REQUEST FOR PROPOSALS

FOR THE GROUP PURCHASE OF RESIDENTIAL SOLAR ENERGY SYSTEMS

RFP Issued date: May 9, 2024

Responses due: June 14, 2024

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## I. Summary of Solarize Campaign

Clean energy advocacy efforts have identified expanded residential solar installation as a priority in sun-blessed locations such as Central Oregon. The Solarize Campaign was established to accelerate the pace of solar installations in Deschutes County. This campaign intends to follow a model that has proven successful in other communities across the country. A local team of partner organizations and volunteers will provide intensive outreach, education, and advocacy, along with discount pricing from carefully selected contractors, to help encourage new solar installations. The goal of the campaign is to sign-up at least 50 new customers for solar or solar + storage systems over a 10-week period. The campaign will strive to reach residents across income levels and provide information about Community Solar for households that are not a good fit for rooftop solar.

The benefits we provide to customers include:

- **Simplicity:** We provide a starting point, basic information and education about the process, and connections to a vetted partner installer.
- **Trust:** We are a non-profit and offer unbiased information.
- **Savings:** People who sign up during a campaign get a special discount.

We are looking for partner installers to work with us on this campaign. Because we do the work to find new customers, you will save on acquisition costs. We ask you to pass on the savings as a special group discount to customers who sign up during the campaign. The discount can be tiered based on the number of customers who sign up.

### **Solarize Campaign Goals**

- A substantial surge in residential solar power system installations during the campaign period (generate 50+ additional installations over the next 6-9 months).
- Significant customer cost savings for installation of a new solar power system compared to typical individual residential installations.
- A simplified consumer process facilitated by pre-screened contractors who can deliver a high quality system and provide exceptional customer experience before, during and after system installation.
- Increased participation by low and moderate-income households through targeted outreach and guidance about upcoming Solar for All and other low and moderate income incentives.
- Create a model that can be scaled and replicated across Central Oregon.

## II. 2024 Solarize Campaign Geographic Scope and Partners

### Geographic Scope

This campaign is targeting households throughout Deschutes County.

### Campaign Partners



#### **Energize Bend - Project Lead**

*energizebend.org*

Energize Bend is a non-profit coalition of organizations and individuals educating the community, helping individuals make upgrades, and advocating for the transition to clean energy and electrification in Bend. Energize Bend is fiscally sponsored by The Environmental Center, a 501c3 nonprofit.



#### **The Environmental Center - Project Sponsor**

*envirocenter.org*

LOCAL CHANGE. A WORLD OF DIFFERENCE.

Lindsey Hardy (she/her), 541-948-9915, [lindsey@envirocenter.org](mailto:lindsey@envirocenter.org)

In 1989 The Environmental Center was born to inspire locals to live lighter on the planet. Our work began with a handful of people and a building in the center of Bend. Today, we've grown to become a regional leader in environmental education, engagement, and action. Our team works alongside people of all ages, local businesses, and elected officials to create and advocate for meaningful change. Through unique programs and partnerships, we strive to engage as many people as possible in our mission: To embed sustainability into daily life in Central Oregon.



#### **Envision Bend**

*envisionbend.org*

Envision Bend brings diverse stakeholders together to educate, engage and empower all members of the Bend community to have a voice in our city's future. In 2023, Envision Bend published the community's Vision Action Plan for the greater Bend region. Solarizing Bend is one of 28 strategies outlined to significantly move the needle and move our region forward in the coming 5+ years.



**Energy Trust of Oregon**

*energytrust.org*

Energy Trust of Oregon is an independent nonprofit organization dedicated to helping utility customers benefit from saving energy and generating renewable power. Our services, cash incentives, and energy solutions have helped participating customers of Portland General Electric, Pacific Power, NW Natural, Cascade Natural Gas and Avista save \$4.6 billion on energy bills. Our work helps keep energy costs as low as possible, creates jobs, and builds a sustainable energy future.

### **III. 2024 Solarize Campaign Timeline**

The following is the proposed timeline for the Solarize Campaign. The proposed timeline and dates are subject to change and should be used for planning purposes only.

Outreach to installers	Beginning 5/6
RFP Announced	5/9/24
Q&A Webinar	5/16/24
Questions / Comments from Installers due	5/22/24
Question responses posted	5/29/24
Proposals due	6/14/24
Reference checks & interviews	Week of 6/17
Firms Selected	6/28/24
Participant registration open	8/15/24
Participant registration closed	10/31/24
Participant list available to selected installer(s)	On a rolling basis
Installations completed goal	6/30/25

#### IV. Proposal Due Date & Submittal

Please submit a proposal no later than **5pm PST on Friday, June 14th** via the Google Form posted on <https://envirocenter.org/solarize>.

#### V. Basic Requirements for Proposing Firms

- Must provide a group-based pricing structure that reduces cost.
- Must provide service throughout the campaign area.
- Must accurately represent solar regulations, incentives, and benefits to the community and customers.
- Must be an Energy Trust of Oregon Trade Ally in good standing.

#### VI. Proposal Evaluation Criteria

Evaluation Criteria includes, but is not limited to:

**Cost proposition** - Including base price and additional cost factors

**Equipment and warranty quality** - Based on Energy Sage [ranking](#), good, very good and excellent rated products.

**Contractor's proximity to the service area** - Based on local presence such as brick and mortar office or warehouse in Deschutes County and/or work performed in the last five years.

**Contractor's history of quality work, reliability and customer service** - Based on permit inspections, consumer protection complaints, business standing, customer service process, and reference calls.

**Contractor's business practices** - Based on installer providing family wages, benefits, apprenticeships and the installer's sustainability practices.

**Contractor's longevity and stability** - Based on the number of years the company has been licensed and number of installs in Deschutes county over the last five years.

**Community partnership** - Based on willingness to partner with the Solarize Campaign on events, workshops, press and other marketing and outreach activities.

**Interview** - for the top scoring respondents.

## VII. Proposal Contents

### **I. Cover letter**

The cover letter shall discuss the proposal's highlights, key features, and distinguishing points. It must be signed by a manager with the authority to make offers and enter into financial agreements on behalf of the firm(s).

### **II. Proposing firm profile (20 points)**

- A. Detail the proposing firm's size and organizational structure.
- B. Describe your local presence.
- C. How many total installs has the firm done in the past 5 years, by year, and how many were in Deschutes County?
- D. Describe the demonstrated experience of the firm in developing, designing, and installing residential solar electric systems, and how that would apply on a group scale.
- E. Length of time in business.
- F. Indicate your service areas.
- G. Include a statement of the firm's financial stability.

### **III. Qualifications of the project team (10 points)**

- A. Identify key personnel for this project including roles, experience, licenses, and certificates and location with corresponding identification numbers as appropriate. Key personnel should include at a minimum: Owners/Principals; Project Managers; Designers; Installers; Sales; and the Office Manager who will provide data to the Solarize Campaign per the specifications outlined in the Scope of Work.
- B. Identify any subcontractors the firm plans to use, along with their value to the project, and provide background information on their size, experience, management, licensing, and subcontracting agreement.

### **IV. Capacity (5 points: Installer will be evaluated on ability to meet projections, not on total capacity)**

- A. How many leads per week can you accommodate?
- B. Indicate the total installations your team can complete per month (average size 7

kW).

C. Provide a statement describing the firm's capability to complete the program per the timeline specified above. Explain how the firm can meet the demand you have indicated above and if you will need to expand your local capacity.

**V. Business practices (10 points)**

**A.** Describe the process for in-office management of leads, from receipt of lead information from the solarize campaign through customer contact, scheduling of site assessments and installations, and processing of relevant paperwork. Indicate what software and systems the firm uses to facilitate sales and reporting.

**B.** Describe your expected time frames between receiving a lead and site visit, site visit and quote delivery, and contract signing and system installation. Describe your expected timeline for project commissioning.

**C. Provide a representative copy of the customer proposal and contract** that the firm plans to use during the campaign that includes the scope of work, equipment to be installed, terms and timeline of payments, terms for termination, performance verification, and construction timeline.

**D. Liability:** Provide a statement of liability coverage as per trade ally status with Energy Trust of Oregon.

**E. Wages and Labor Practices:** Provide information about labor practices, including your commitment to providing family wages, benefits, apprenticeships, and mentoring programs. Identify the percentage of workers who receive healthcare and other benefits.

**VI. Community and sustainability practices (10 Points)**

**A.** Discuss the firm's previous experience with public awareness and education in the target area of the campaign. Identify the individual(s) who will represent the firm at Solarize workshops.

**B.** Describe any sustainability practices adopted by the firm, partners or contractors. Include energy conservation, energy efficiency services, and waste management practices that the firm or its business partners provide to customers or have adopted internally.

**VII. Work quality and equipment (10 Points)**

- A. Upload the manufacturing spec sheets and warranty information for each piece of major equipment (modules, inverters and storage).
- B. Explain why the products included in the proposal are appropriate for this project. Products should be rated “excellent, very good or good” per EnergySage rating.
- C. Please describe system monitoring capabilities.
- D. Describe the installation process, including how the firm will minimize disruption and disturbance.

**VIII. Customer service (15 points)**

- A. Describe how the firm plans to handle incident reports (trouble-shooting incidents, service and installation warranty issues, service calls, and inquiries). Discuss the firm’s typical response time on calls, hours of coverage for customer service calls, and process for providing status reports after an incident is logged.
- B. Discuss the most common problems and reported issues that the firm has experienced and how they have been resolved. List any complaints received by the Better Business Bureau or the Oregon Attorney General’s office, or other relevant agency over the last 3 years.
- C. Describe the training the firm provides the homeowner, including materials or manuals, customer care books, and/or support for later questions and system performance.

**IX. Pricing and financing schedule (20 points)**

- A. Using the attached pricing spreadsheet, please present a price-per-watt, exclusive of any incentives, tax credits, or company promotions for a grid-tied system installed on a typical detached dwelling. The price shall include all work described in Section X. Scope of Work in this RFP.
- B. Using the attached pricing spreadsheet, identify any factors or special conditions which would result in additional costs (such as roof materials, roof slope, improvements to existing wiring, roof access) and provide estimates of additional charges for each such factor or condition. Describe any changes to the proposed pricing that would be applicable to commercial customers.
- C. Consider indicating common additional services your firm provides such as EV chargers, storage, or energy efficiency.
- D. Describe the financing options that you provide homeowners. Do you work with



Puget Sound Community Credit Union (PSCCU)? Are there other vendors that you offer financing through for solar and solar+storage?

*Note: Customer contact, site assessments, system design and cost estimates are to be provided free of charge.*

#### **X. Appendix**

The Appendix may include any supporting information, such as resumes, references, or other data that will support the firm as the best for this campaign and for the community.

### **VIII. Anticipated Outcome from RFP Process**

The Solarize Campaign intends to engage at least one contractor for the campaign service area. The Campaign may engage multiple contractors to support the goals of the campaign.

### **IX. Conditions & Reservations**

The Solarize Campaign is not obligated to enter into an agreement with any Proposer and has no financial obligation to any Proposer arising from this RFP. The contract between the homeowner and the selected firm will not include Solarize Campaign as a party, and the selected contractor will be solely liable for any claims, losses, or damages arising out of the Contract. The contractor will be expected to sign a Memorandum of Understanding (MOU) with Solarize Campaign to confirm each party's roles and responsibilities prior to work starting.

Furthermore, Solarize Campaign reserves all rights regarding this RFP, including, without limitation, the right to:

- Amend, delay, or cancel the RFP without liability if the team finds it is in the best interest of the project to do so. In the event it becomes necessary to amend any part of this RFP, notice will be provided in the same manner as notice of the original solicitation;
- Reject any or all Proposals received;
- Waive any minor informality or non-conformance with the provisions or procedures of the RFP, or to seek clarification of any Proposal;
- Negotiate and/or amend the Scope of Work to serve the best interest of the project.

### **X. Scope of Work**

The purpose of this Campaign is to enable the selected firms to access cost efficiencies through a program that combines lowered customer acquisition costs with group purchasing.

Solarize Campaign will perform outreach to motivate participants to seek solar site assessments. The Campaign's goal is to reach 30,000 households using city utility mailers, local marketing and press and community outreach. The Solarize Campaign team will present information, answer questions, and provide an interface to the community at workshops.

As prospective participants are identified, their information will be distributed to the selected firms on a rolling basis. The selected firms will provide site assessments and proposals for each interested participant. Individual system designs should be aesthetically pleasing, taking into consideration the preferences of the owner while minimizing project costs and maximizing solar energy production. Proposals should take into consideration each owner's financial and site limitations.

For each participating home or small business, the selected firms will be responsible for securing all required permits and scheduling and passing all jurisdictional and utility inspections. The firms will provide introductions and support materials to the campaign's potential financing options.

**Solar Installation Partners Scope of Work:**

- Fulfill solar installations in accordance with the proposal presented for this RFP;
- Manage all participant site evaluations, work contracts, and solar system installations;
- Provide the participant with initial outreach within an agreed upon time frame between the campaign and the selected firm. Coordinate and complete participant initial site evaluations within the agreed upon time frame between the campaign and the selected firm. Proposals must be valid for 30 days, until at least December 1, 2024.
- The written proposal to the customer should at a minimum include the following content:
  - a. A summary of major equipment to be installed, including solar modules, inverters, control panels, etc.
  - b. A clear representation of the likely physical placement of solar panel modules , exterior equipment, conduit and other boxes and panels, and modifications to existing electrical service equipment.
  - c. A summary of federal, state or local tax credits and other financial incentives available to the customer, along with an explanation of which will be obtained by the contractor on the customers behalf, and those which must be applied for separately by the customer.
  - d. A break-even analysis that clearly explains system costs, expected utility cost savings, and likely break-even point considering available financing scenarios (down payment, interest rate and loan period).
  - e. Expectations for annual and monthly/seasonal electrical power generation, and associate electrical utility cost saving.
- Execute customer contracts between the participant and the installation partner, with written specification within the customer contract that Solarize Campaign is not a party to the contract and that the installation partner is solely liable for any claims, losses, or damages arising out of

the contract;

- Provide the following required customer services before and after customer installations:
  - After initial screening, the contractor will conduct a site assessment and meet with the homeowner to assess the viability of solar installation, explain the installation process, and explain the major provisions of the proposal.
  - Contractor will provide the name and phone number for a customer liaison during the installation process who can meet with the customer on the first day of installation and address any on-going customer concerns during the installation process.
  - Contractor will conduct a close-out meeting with the customer after installation to explain key safety provisions, how to operate the system and recommended periodic on-going maintenance.
  - Contractor will provide written documentation that provides the specifications and configuration of the installed system, a summary of safety provisions, operational instructions and maintenance recommendations.
  - Contractor will define a period for no-cost post-installation technical support (for operations and maintenance), and corrective action to quickly address any installation problems or defects.
- Take photos of each completed installation and compile them into a shared folder;
- Maintain an up-to-date customer management system and provide the Solarize Campaign with bi-weekly reports that include;
  - o Customer status
  - o Date of scheduled or completed site assessment
  - o Date of contract signing
  - o Date of scheduled installation
  - o Date of final payment
  - o Kilowatt capacity, price of system, and any applicable cost adders
- Participate in campaign team meetings as scheduled;
- Provide Solarize Campaign with a \$400 per installation commission payment. Commission payments are due within 30 days of receipt of the Project Sponsor's invoice. The project sponsor will generate invoices monthly based on the submitted customer reports. Late payments may be subject to a \$10.00 per business day late fee.
- Occasionally attend and present at community workshops;
- Support project partners to publicize the campaign and provide press interviews as needed under coordination by Solarize Campaign;
- Secure Solarize Campaign's approval to publish any external statements or publications relating to the project prior to publication;
- Participate in campaign evaluation.

## **XI. Example Terms & Conditions to be Included in MOU**

**Roles & Responsibilities:** MOU will identify the roles and responsibilities for both the Solarize Campaign and the Installation Partner as represented through this RFP document.

**Privacy Policy:** Names, addresses, and additional information of those who participate in workshops, register on the website, or install solar systems through the project will not be made public or otherwise sold or exchanged unless the homeowner or business gives express written or opt-in permission.

The Solarize Campaign reserves the right to inspect solar contracts and warranty information from projects to ensure compliance with Campaign terms.

**Campaign Expectations:**

- Additional customers resulting from a campaign customers' referral must receive Project pricing and inclusion until the contracting deadline passes.
- Installation partners must accurately represent incentives and tax credits. Misrepresentation of credit eligibility will result in termination of this agreement.
- Installation partners will not contract installations on roofs in poor condition (less than 10 years of usable or warrantied life remaining) nor on sites with poor solar resource (less than 75% TSPF) unless the Campaign provides written approval.
- Installation partners may only offer the equipment outlined in the MOU or approved in writing by the Campaign. Installation partners are responsible for ensuring and providing proof that extended warranties are secured.
- Campaign will distribute participant leads in a non-biased fashion based on the participant's location and installer partner's capacity. The Campaign may change distribution practices based on contracting rates and kilowatts contracted.

## XII. Pricing Sheet

<p><b>Pricing Guidance:</b> Please indicate a "base price" for this Campaign, expressed in dollars per watt, that accounts for a simple turnkey installation.</p>		
<p><b>Cost Adders:</b> For projects with special circumstances, contractors may choose to include cost adders in addition to the base price, expressed in dollars per watt, where applicable. Please add others as relevant.</p>		
<p><b>Optional Extras:</b> Please indicate if your firm offers services in addition to solar installations.</p>		
Cost Factors	Installer Proposal	Description
Base Cost		
Premium Modules		
Specialized Mounting		
Roof slope		
Number of Roof Surfaces		
Small System Adder		
Large System Discount		
Trenching		
Lift required		
Travel		
Electrical Panel Upgrade		
Other adders		
Optional Extras		
Residential Energy Storage		
Energy Audit		
L2 EV Charger		
Heat Pump HVAC		
Heat Pump Water Heater		
Energy Efficiency Products		
(Add other services)		

