**Solarize Community Solar Toolkit**

**Solar Installer RFP Template Overview**

Selecting a solar installer or PV developer for your campaign is one of the most important roles for your core group to play. The installer selection process is a great opportunity to shape the campaign to meet the goals of your community, and to get to know the solar installers who will be working with you to serve your neighbors. The process can also be challenging, as it involves reviewing multiple competing proposals while trying to make “apples to apples” comparisons.

As a Solarize campaign participant, you’ll receive the following support:

 Prequalification of solar installers (see RFP for details).

 This RFP template for solar installers.

 An informational workshop/webinar about the process.

 A review of proposals by our technical assistance provider.

We hope this support will help you make a well-informed and confident decision. And it is *your* decision: your team is fully responsible for issuing an RFP, collecting responses, and utilizing NYSERDA resources in making the best decision for your campaign. *Please note,* *NYSERDA cannot*

*provide legal advice or act as legal counsel to any community.*

**How the RFP Template Works**

This RFP template is meant to provide clear guidelines and expectations for solar installers interested in participating in a Solarize campaign, and to encourage responses that are detailed but easily understood. It is also meant to make the process as straightforward as possible for installers, who are investing their time and resources to respond.

Solarize is not one size fits all. This template both requires the addition of campaign-specific information (the highlighted text) and provides opportunities for your Solarize team to include your own community priorities. For example, some campaigns choose to select installers that are locally based, or may be partnering with local installers. You should be as clear as possible about your campaign’s selection preferences.

In addition, the overall structure of Solarize campaigns can vary depending on individual team goals and the local context. This template allows campaigns to offer their community the option to participate in community solar. A community solar project is a group of solar panels installed in a sunny location where homeowners, renters, and businesses can subscribe to access the clean energy produced by the panels, and get credits on their electric bills. By using this template, your Solarize team will be able to select a solar installer that will provide clear and transparent community solar options. For more information on community solar, please visit nyserda.ny.gov/communitysolar.

Installers of community solar projects determine which plans are available. These are the basic options:

|  |  |
| --- | --- |
| **Membership Types** | **Details** |
| **Subscription Model** | * Little to no up-front cash layout * “Pay-as-you-go” subscription * Different term options |
| **Purchase Plans** | * You own the panels located in the community solar project * Financing options are usually available * Potentially greater savings over time * You may also be eligible for tax credits |

Once again, the RFP template is provided for your guidance. Your team is responsible for its use, the installer selection process and decisions, and the implementation of your Solarize campaign. **Please**

**feel free to contact NYSERDA at** [communitysolar@nyserda.ny.gov.](mailto:communitysolar@nyserda.ny.gov.%20)

**Frequently Asked Questions (FAQs))**

**Can we change the RFP or use our own?**

Yes, this is your community and your campaign. This template requires you to make some changes and edits, and you can add your own community priorities.

*(continued)*

**How should we make solar installers aware of our campaign and distribute our RFP?**

NYSERDA and its partners will be providing all eligible solar installers with a list of campaigns launching this spring. However, we also recommend reaching out to installers in your area and utilizing the public list of NY-Sun participating installers at [www.ny-sun.ny.gov/Get-Solar/Find-A-Solar-Electric-Installer](http://www.ny-sun.ny.gov/Get-Solar/Find-A-Solar-Electric-Installer).

We recommend setting up an email address for your campaign and possibly using a file sharing service to receive proposals.

**What if someone on our core team has a business or personal connection to an installer that is applying?**

Any individual with conflicts should exclude themselves from the Solarize campaign.

**Solarize \_\_\_\_\_\_**

**Request for Proposals**

**Posting Date: xx/xx/xxxx**

**Proposals Due: xx/xx/xxxx**

**Proposal submissions and all communications regarding this RFP must be directed to \_\_\_@\_\_\_\_.\_\_\_**

**Prior to submitting a proposal**

Installers must send an email to [communitysolar@nyserda.ny.gov](mailto:communitysolar@nyserda.ny.gov) including the following information: name of company, physical address, and contractor/builder relationship if applicable, Salesforce number(s) of participating project(s). As a service to Solarize communities and the installers, NYSERDA will be prequalifying installers before proposals are submitted. Please see *Eligibility Requirements* for more information.

|  |  |
| --- | --- |
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**Overview**

Solarize \_\_\_\_ invites proposals from solar electric (PV) developers (“Developers”) to participate in Solarize \_\_\_\_\_\_. One or more Developers may be selected (“Selected Developers”) to provide services to customers participating in Solarize \_\_\_\_\_. Proposers must be NY-Sun Participating Contractors and meet all eligibility requirements described in this RFP. Developers are welcome to submit joint/consortium proposals, providing responsibilities are clearly delineated.

Solarize \_\_\_\_\_ is a community campaign led by Town/Organization, Town/Organization, and Town/Organization (“Solarize Team”), working with a committed team of partners and volunteers. [Add short description of your Solarize campaign, including specific geographical area served].

The goals of this campaign include: (Add/adjust for additional campaign goals)

1. Bring together a critical mass of educated, engaged solar customers.
2. Provide transparent and clear pricing for community solar subscriptions or purchases.
3. Raise awareness and increase the adoption of solar energy.

Complete proposals from eligible Developers that are received by the (\_\_\_\_ deadline) will be reviewed and evaluated by the Solarize Team as described in this RFP.

Once selected, the Selected Developer(s) will collaborate with the Solarize Team to roll out a 16-week community marketing and outreach campaign, which is planned to start in XXX with the goal of securing \_\_subscriptions in a community solar project. All leads gained as a result of the outreach campaign will be forwarded to the Selected Developer(s), who will provide the services described in this RFP, including responsive customer service, and transparent customer terms.

Solarize\_\_\_\_\_\_\_\_\_ is supported by the New York State Energy Research and Development Authority (NYSERDA) under the NY-Sun Initiative. This dynamic public-private partnership is driving growth of the solar industry and making solar technology more affordable for all New Yorkers. Solarize is designed to reduce customer acquisition costs and other common barriers to promote greater adoption of solar energy.

**Community Solar Solarize Campaign Summary**

This section provides a summary of campaign activities and responsibilities. The success of a campaign depends on the collaboration of the Solarize Team and its partners, the Selected Developer(s), and the participating community members (customers). Please review **Roles and Responsibilities** for more details on expectations for all participants.

Solarize Team Organization and Preparation (Winter 2018 − Spring 2018)

* The Solarize Team organized a team of partner organizations and a core group of individuals responsible for the implementation of the campaign.
* The Solarize Team successfully applied to participate in Solarize and receive support from NYSERDA (visit [ny-sun.ny.gov/solarize](https://www.nyserda.ny.gov/All-Programs/Programs/NY-Sun/Communities/Solarize) for more information).
* The Solarize Team has developed an outreach plan and is preparing for widespread community education and marketing during the campaign.

Developer Selection (March 2018)

* Eligible Developers interested in participating in this Solarize campaign review this RFP, including the **Proposal Requirements** section, and submit proposals to the Solarize Team.
* The Solarize Team, with assistance from the NY-Sun’s technical assistance provider, reviews and evaluates proposals. Interviews are conducted with a short list of Developers.
* The Solarize Team chooses one or more Selected Developer(s). Developers may be asked to revise their proposals before selection is finalized.

Community Marketing Campaign (May 2018 − September 2018)

* + The Solarize Team, working closely with the Selected Developer(s) to coordinate messaging and activities, will implement a community marketing and education campaign. The campaign will consist of public meetings and events, media outreach, social media, and online marketing along with other activities to encourage area residents and businesses to sign up for before the **Signup Deadline**. (See **Attachment A** for a list of currently planned events and activities).
* The Solarize Team will make use of the Solarize Marketing Toolkit provided through NYSERDA. The Solarize Team and the Selected Developer(s) may also use other marketing materials and approaches.
* The Solarize Team and Selected Developer(s) must clearly present to potential Solarize participants that, before signing a contract with the Selected Developer(s), they are free to independently seek other offers.

Participant Signup and Contracting (May 2018 − November 2018)

* + Interested residential and business customers will be referred to a dedicated Solarize campaign webpage, which will include information about the campaign, Selected Developer(s), and contracting process.
* Participants will sign up through an online form on the webpage. These leads will be accessible to the Selected Developer(s) and Solarize Team through an online platform.
* Customers that are deemed qualified for a community solar subscription will have the option to contract with the Selected Developer(s) before the deadline.

**Solarize Timeline**

***Please note that dates are estimates and subject to change.***

|  |  |
| --- | --- |
|  | |
| RFP for Solarize Developers Released | 03/\_/18 |
| RFP Questions Due | 03/\_/18 |
| RFP Question Responses Released | 04/\_/18 |
| RFP for Solarize Developers: Proposals Due | 04/\_/18 |
| Interviews with Developer(s) | \_4/\_/18 |
| Developer(s) Selected | \_/\_/18 |
| Solarize Launch Event | Week of 5/\_/18 |
| Solarize Public Outreach & Education Events | \_/\_/18 - \_/\_/18 |
| Participant Signup Deadline | \_/\_/18 |
| Participant Contracting Deadline | \_/\_/18 |
| Community Solar Project Completion | 10/4/18 |

**Eligibility Requirements**

To be eligible to submit a proposal, Developers must:

1. Prior to submitting a proposal, send an email to [communitysolar@nyserda.ny.gov](mailto:communitysolar@nyserda.ny.gov) including the following information: name of company, physical address, and contractor/builder relationship if applicable, and Salesforce number(s) for participating community solar project(s). As a service to Solarize communities and the Developers, NYSERDA will be prequalifying Developers before proposals are submitted based on the following criteria. The Developers must:
   * Be a NY-Sun Participating Contractor in full compliance with program rules.
   * Maintain insurance of the types and in the amounts specified in Article 6 of the Selected Developer(s) Participation Agreement with NYSERDA under the NY-Sun Incentive Program.
2. Hold all relevant licenses and other requirements for the jurisdiction(s) served by the campaign.
3. Demonstrate at least 3 years of experience and proficiency in solar electric installations.
4. Provide detailed reporting to the community on a twice monthly basis using a provided reporting template. Reports should include, at minimum, name of customer, date of contact, status of lead, and all relative notes.
5. Agree that if at any time throughout the project the applicant is suspended or terminated from the NY-Sun Program by NYSERDA, all work and or services will immediately cease unless otherwise directed by NYSERDA. It is the campaign’s and NYSERDA’s discretion to determine a course of action following this removal. All leads generated through the Solarize campaign are owned by the campaign, and must be turned over at time of removal.
6. Submit a complete proposal by 5:00 p.m. on \_\_\_\_\_\_\_\_\_\_\_. Proposals should be emailed to \_\_\_\_\_\_\_\_\_\_.

**Proposal Requirements**

*Please read the important confidentiality warning on page 15; it may affect your rights. Proposals must contain the following sections, clearly labeled:*

1. **Cover Letter:** Include Solarize RFP Cover Letter (**Attachment B**) signed by authorized company representative on company letterhead. Submit as a PDF file.
2. **Community solar Project(s) Profile and Pricing Form:** Developers must use the Solar Developer Profile and Pricing Form template (**Attachment C**) and submit the completed form as a Microsoft Excel file. Follow instructions within the template and fill in relevant fields in all tabs, including:

* Firm information and experience
* Certifications, licenses, and insurance
* Service territory and load zone
* Estimated subscriber capacity
* Standard pricing for subscription (or purchase)
* Equipment specifications (manufacturers; models; and warranties for modules, inverters, racking, and other equipment)

1. **Core Proposal:** Address the key elements of the Developer’s qualifications and services to be provided through the Solarize campaign. The Core Proposal should reference, not repeat, information that is provided in the Profile and Pricing Form. The Core Proposal should not exceed six (6) pages in length and must be submitted as a single PDF document. Each page must be numbered and include the company’s name. Clearly label each of the subsections outlined below.

* **Developer Team Qualifications:** Describe the project team, constructions subcontractors, including, but not limited to, partners assisting in project financing, customer management and billing, and marketing and outreach.
  + Developers may provide a joint/consortium proposal, but one Developer must be identified as the lead company, with overall responsibility for the campaign.
  + Highlight relevant experience, skills, and capabilities necessary to implement this campaign.
  + Identify past experience with group purchasing programs, as well as any other Solarize campaigns for which you are applying.
* **Financial Strength and Credit Relationships:** Describe and document the state of the financial health of the company and how it will manage the financial requirements of the community solar project for the Solarize campaign.
  + If your firm utilizes a line of credit or has access to other credit facilities, please describe these and provide the contact information for the lending institutions.
  + If equipment suppliers provide your firm with trade credit, please describe these trade credit arrangements and provide contact information for the suppliers.
* **Implementation Plan:** The proposal should outline a detailed strategy that should at a minimum address the following items:
* Ability to provide the full set of required services to the community throughout the Solarize campaign, including ability to provide timely customer service and clear and transparent terms.
  + An outline of the process and timeline for community solar development, contracting, permits, installation, inspections, and the interconnection process with the local utility.
* **Marketing Strategy:** Describe ways in which a collaborative marketing strategy between the community and the Selected Developer(s) can expand the number of subscriptions within the community.
  + If applicable, cite specific examples of marketing services that will be provided, items, or marketing materials that will be offered by the Developer.
  + List marketing, outreach, and lead screening tasks the Solarize Team can perform as part of this plan to reduce the Developer’s soft costs.
* **Pricing Structure and Financing Options:** Provide any additional description (beyond what is included in the Profile and Pricing Form) of the proposed pricing and the financing options to be offered to Solarize participants.
  + Include existing relationships with banks or financial institutions and any other access to financing tools and products.
  + Alternative pricing structures or financial models will be evaluated as appropriate.
* **Low-to-Moderate Income (LMI) Customers:** Detail your experience working with LMI customers, and your approach to serving this market.
* **Special Requests:** Special requests could include requests for additional information about the Developer, indicated preference for certain qualities or services, indicated preference for specific equipment and specifications, etc.

1. **Contract Sample:** Provide in a PDF file.

* Developer’s subscription or PPA agreement with the customer, specifying all terms and conditions for a customer under the Solarize campaign

**Evaluation Criteria**

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

* **Overall quality and value:** Overall quality of proposal and specified equipment.
* **Experience:** Degree of Developer’s experience and proficiency in the scope of work, including demonstrated experience in developing, designing, and installing community solar projects.
* **Implementation and capacity:** Ability to provide timely, quality customer service and work well with the Solarize Team.
* **Adequate financial strength:** Solarize is intended to result in a very significant number of subscriptions to the Selected Developer’s community solar project. Selected Developers must be able to demonstrate sufficient financial strength to successfully carry out this program (e.g., adequate trade credit and cash availability).
* **Marketing plan:** Ability of proposal to drive community adoption of solar electric projects and drive down cost of solar electric installations.
* **Local and environmental impact:** Ability to employ, and hire within the local target area will be looked upon favorably. Developers who offer or would consider offering training, certification, and employment in the field, particularly to residents within the community, using strategies that encourage linkages to experienced community-based nonprofit workforce development organizations will be looked upon favorably, as well as developers who can demonstrate business sustainability practices.
* **Other factors:** Additional consideration will be given to developers that can provide innovative business models or have options for other technologies, such as battery storage, energy efficiency and approaches to land management practices (e.g. pollinator friendly vegetation). Information on siting solar on agricultural land can be found on NYSERDA’s Solar Guidebook website, nyserda.ny.gov/solarguidebook.

**General Conditions**

*Please note, NYSERDA cannot provide legal advice or act as legal counsel to any community. Communities should consider incorporating provisions regarding indemnification and limitations of damages in agreements with Selected Developer(s). The following is provided for informational purposes only.*

**Indemnification**

Selected Developer(s) will protect, indemnify and hold harmless [Solarize Team Members], and their officers, directors, employees, agents, and affiliates from and against all liabilities, losses, claims, damages, judgments, penalties, causes of action, costs and expenses (including, without limitation, experts’ and attorneys’ fees and expenses) imposed upon, incurred by or asserted against [Solarize Team members], resulting from, arising out of, or relating to the PV Contractor’s work under the Solarize campaign. The obligations of the PV Contractor under this indemnity will survive the expiration or termination of the Solarize campaign, and are not limited by any insurance coverage required under this RFP.

**Limitation of Liability**

[Solarize Team Members] shall not be liable to the Selected Developer(s) for any special, indirect, incidental, consequential, punitive, or exemplary damages of any kind whatsoever, whether based on contract, warranty, tort (including negligence or statutory liability), or otherwise.

**Nondiscrimination**

The Selected Developer(s) agrees and warrants that they will not discriminate or permit discrimination against any person or group of persons in any manner prohibited by the laws of the United States or of the state of New York;

**Waiver Authority**

The Solarize Team 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 Developer selection.

**Confidentiality Statement**

Proposal documents may be shared with public entities that are subject to the Freedom of Information Law. The NYS Freedom of Information Law (“FOIL”), Public Officers law, Article 6, provides for public access to information NYSERDA possesses. Therefore, proposal documents may be subject to public disclosure under FOIL. Careful consideration should thus be given before confidential information is submitted as part of your proposal.

Public Officers Law, Section 87(2)(d) provides for exceptions to disclosure for records or portions thereof that "are trade secrets or are submitted to an agency by a commercial enterprise or derived from information obtained from a commercial enterprise and which if disclosed would cause substantial injury to the competitive position of the subject enterprise." Information submitted to the Solarize Team that the proposer wishes to have treated as proprietary, and confidential trade secret information should be identified and labeled "Confidential" on each paragraph, table, or figure at the time of submission. Any such submission must include a detailed written explanation of the basis for withholding from disclosure. For further information, see Public Officers Law, Section 89(5) and the procedures set forth in 21 NYCRR Part 501 <https://www.nyserda.ny.gov/About/-/media/Files/About/Contact/NYSERDA-Regulations.ashx>. The Solarize Team and NYSERDA cannot guarantee the confidentiality of any information submitted.

**Disclaimer**

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

**Roles and Responsibilities**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Solarize Team** | **Selected Developer(s)** | **Customer** |
| **Organize Solarize Campaign** | * Gather a community team of volunteers, including a lead contact and a Selected Developer(s) selection committee * Evaluate Developer proposals and select Developer(s) * Build partnerships among various community leaders/organizations to help with outreach | * Submit accurate and complete proposal |  |
| **Reduce Costs** | * Lead community outreach to help the Solarize campaign reach target goals * Help community participants understand Solarize approach and set expectations | * Provide competitive, transparent pricing | * Provide all necessary information |
| **Marketing/Outreach** | * Organize/mobilize community networks and utilize a broad range of tactics to get the word out * Host outreach events and table at existing community events * Send regular Solarize updates to community contacts * Manage customer expectations | * Participate in outreach planning * Participate in community outreach events where appropriate * Manage customer expectations * Optional: supplement community outreach (direct mail, yard signs, etc.) | * Promote Solarize through social media and networking circles * Consider volunteering to help with the campaign |
| **Education** | * Answer community questions about the Solarize campaign * Answer basic solar energy questions and direct residents to available resources | * Present at the Solarize launch event and workshops * Answer technical questions from volunteers/residents | * Attend educational events and ask questions |
| **Web and Media** | * Assist in providing content (including photos and stories) for Solarize web pages and media outreach * Encourage and cooperate in local media coverage (print, radio, TV) * Submit “letters to the editor” to local newspapers | * Cooperate with Solarize Team to provide content (e.g., photos, stories) and accommodate reporters | * Consider participating in media coverage |
| **Customer Service** | * Provide participants with information about the Solarize campaign and process * Respond to inquiries and forward to the Developer(s) as appropriate | * Follow up promptly to participant signups and inquiries * Provide explanation for all terms | * Be responsive to Developer communications |

**Attachment A: Planned Events and Activities**

*List and describe any currently planned events and activities that would be helpful for proposing developers to be aware of. Indicate whether Developer(s) participation is required for each event or activity.*

**Attachment B: Solar Developer Cover Letter**

**Attachment B: Solar Developer Cover Letter**

**Solarize \_\_\_\_\_\_\_\_**

The undersigned is the duly authorized representative of the company or entity identified below (the “Company”), with full authority to sign this document and to submit the Company’s proposal pursuant to the Solarize \_\_\_\_ Request for Proposals (the “RFP”).

I hereby certify:

* The Company is duly organized and in good standing under the laws of the jurisdiction in which it is organized. The financial statements are true, correct, and complete and fairly present the financial condition of the Company as of their date. Since the date of the most recent financial statements, there has been no material adverse change in the Company’s financial condition. All tax returns required to be filed in any jurisdiction have been duly filed, and all taxes due in respect of the Company have been duly paid.
* The Company has read the RFP, understands it and is familiar with its requirements.
* The information contained in this proposal, and any correspondence or other documentation relating to this proposal, are all true, correct and complete. The information disclosed by the Company in this proposal relating to corporate partnerships, affiliations, and other relationships is true, correct, and complete.
* The Company understands and acknowledges that, until a final selection is made under the RFP, the Solarize Team may enter into discussions with the Company to negotiate the terms of its proposal in an effort to reach the most favorable arrangement for the relevant community. Moreover, the Solarize Team reserves the right (i) to reject any or all proposals; (ii) to waive defects or irregularities in any proposal; (iii) to discontinue discussions at any time and for any reason; (iv) to correct inaccurate awards; (v) to change the timing or sequence of activities related to Solarize \_\_\_\_; (vi) to modify, suspend or cancel Solarize \_\_\_\_\_; and (vii) to condition, modify or otherwise limit the mandate pursuant to the RFP.
* By submitting this proposal, the Company represents and warrants that, if it is selected under this RFP, it will comply with the terms of the RFP and will perform all of the duties and obligations of the “Selected Developer” under the RFP.

Developer: ­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*(Printed Name of Developer Organization)*

By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*(Printed Name of Authorized Representative)*

Signature: ­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_