



Solarize Harrisonburg RFP

August 19, 2014

Dear Installer,

Thank you for your interest in our Solarize Harrisonburg coop! We're excited to issue a RFP on behalf of a group of homeowners in Harrisonburg Virginia. We've worked closely with community stakeholders and volunteers to recruit interested homeowners for this group.

Enclosed please find the official RFP for this solar coop. Although we've been organizing solar coops since 2007, we've recently ramped up our efforts. Over the last year we've facilitated 16 different solar coops with over 1200 participants. Throughout the process we've collected data and feedback from participants.

Our goal is to help as many homeowners go solar as possible. We also want to help grow a strong, vibrant solar market in the state of Virginia. By using our lessons learned from previous solar coops, we hope to continue to help communities go solar and support our region's growing solar market.

As part of our effort to promote a fair and transparent solar coop process, below we've outlined (1) our solar coop program process, (2) some of our lessons learned from previous solar coops, and (3) our expectations for installers that are selected by a solar coop. We want to be as clear as possible about the solar coop process and what to expect if your company is chosen by the Selection Committee.

If you have any questions about the process or installer expectations, please don't hesitate to email Virginia SUN Program Director, Aaron Sutch (aaron@vasun.org).

We look forward to receiving your submissions!

Best,

Anya Schoolman
Executive Director
[CPN](#)

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Solar Coop Process

Phase I: Education and Outreach

1. Community members organize to form a solar coop.
 - a. CPN facilitates info sessions, educates participants on solar.
 - b. Participants signs up via online form.
 - c. CPN pre-screens participant roofs and excludes anyone unfit for solar.

Phase II: Installer Selection

2. CPN issues RFP on behalf of group.
3. Participants form a Selection Committee, review bids, and select installer.
 - a. CPN facilitates selection process and provides technical assistance but final decision is made by participants (not CPN).
4. CPN notifies selected installer of Selection Committee's decision.
5. Selected installer signs Letter of Agreement with CPN that outlines expectations for process.
6. CPN notifies participants of the Selection Committee's decision and provides group with winning bid.

Phase III: Site Visits and Recruiting Additional Participants

7. Installer contacts all participants via phone to schedule site visits.
8. CPN recruits additional participants for solar coop.
 - a. Sign up for new participants closes one month after installer is selected.

Phase IV: Ongoing Process Management

9. Installer updates tracking spreadsheet each week with status of each participant.
10. CPN and installer have weekly check-in calls on Tuesdays. Installer has tracking spreadsheet updated in advance of calls.
11. CPN sends weekly update emails to participants with information about solar coop, next steps, and any instructions from installers.
 - a. These emails are an opportunity for the installer to communicate information to the entire group. They also help to keep the group engaged and increase the number of participants signing contracts.
12. CPN follows up with participants that have received their proposal to check in, answer questions, and encourage them to move forward.

Phase V: Celebrate!

13. Installer completes all installations.
14. CPN and installer host party to celebrate successful group!
 - a. We'll do lots of press outreach to help spread the word about the group's success and your company's involvement.

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Lessons Learned from Previous Solar Coops

Our goal with each solar coop is to have a 50% (or higher) close rate for participants. We've put a lot of time into recruiting and educating the participants and we want to make sure that as many people as possible move forward with projects (assuming their homes are a good fit for solar).

Our aim is not to interfere with your internal processes or micromanage how you do business. We have, however, seen very different close rates within solar coops. Some of this has to do with the installer's process and approach. Below we've put together some lessons learned that we've found are helpful in getting a high close rate.

Installers with higher close rates:

- Called participants to schedule initial site visits (gets the best response rate compared to just emailing).
- Scheduled site visits as soon as possible and provided quick turn-around times for sending proposals to participants (proposals received 1 week or less after site visit).
- Provided participants with proposal *and* final contract for signature at the same time (so customer has all information to finalize their decision).
- Had short, concise, very clear email communications with participants. When there's lots of text in a proposal or email, participants stop reading.
- Let the group know when they would be unavailable, or are experiencing delays. Participants understand when there are delays, they just want to be kept in the loop about when to expect information from installers. CPN can communicate this to the group as a whole and help manage expectations, too. Just let us know how things are going.
- Maintained an organized, updated tracking spreadsheet. CPN uses the tracking spreadsheets to monitor the progress of the group and respond to participant questions or concerns.
- Communicated with CPN when there were difficulties reaching participants. CPN will remain involved throughout the process and is happy to reach out to participants to reassure them, to encourage scheduling site visits, signing contracts, etc. Just let us know what you need!

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Our Expectations

We want to be as clear as possible about the solar coop process and what to expect if your company is chosen by the Selection Committee. The following are some of our expectations when working with an installer chosen by the group.

Expectations include:

- Your designated contact participates in a weekly check-in call each Tuesday. On the call you let us know:
 - Status of the group (number of site visits scheduled, number of proposals issued, number of signed contracts—see tracking sheet for details)
 - Questions or concerns that have come up during your site visits or interactions with customers. This will allow us to respond to those questions to the group at large, helping to better educate everyone and saving you time on future site visits. It will help us calm down customers who are concerned.
 - Which participants, if any, you have had difficulty contacting. If participants do not respond to your initial emails and/or voicemails, CPN will reach out in parallel.
 - Any changes in staffing capacity for the week (for example, 2 people will be out of the office).
- The tracking spreadsheet is updated in advance of each Tuesday call.
- You are checking the tracking spreadsheet each day and reaching out to new participants as they sign up.
 - The tracking spreadsheet is linked directly to the sign up form, so it is automatically updated as people sign up. Therefore you need to keep checking as new people will be signing up. Their names will automatically be added to the sign up sheet for 30 days after the announcement that you have been selected as the installer for the group.
- You provide us with a sample copy of your proposal and contract BEFORE it is sent out to participants. This way we can make sure we understand how the information is presented and are able to answer participant questions.
- You pay CPN \$500/signed contract within 10 days of receipt of invoice at the end of each month.
- We will issue promotional materials such as a press release, website, Facebook, web postings, and newspaper articles. We will clear materials with you to the best of our ability. We will feature your company prominently although we will keep the specific details of the winning bid confidential.
- We expect you to also let your customers know about CPN and to encourage them to [sign up for the VA SUN email list](#) as well as [refer them to our website](#) for more information about solar in their state. This will also help you lighten the load of general solar questions you may get. Let us and other solar enthusiasts help instead!

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Solarize Harrisonburg Request for Proposal

Executive Summary

This electronic document represents a Request For Proposals that CPN is issuing on behalf of a group of residential homeowners in Harrisonburg Virginia. We are issuing this RFP on behalf of the group. They intend to select one or more project developers (“Proposers”) to provide solar photovoltaic (PV) energy systems for all of the participating homeowners. The participants will select one or more Proposers to develop all of the projects.

The Proposers will provide a single price/kW installed for the group. This price will be offered to all homeowners participating in the group. The PV projects are to be installed on the roofs of each of the properties and will be owned by the individual property owners.

The goal of the Solar Coop Program is two-fold: (1) to enable the participants to receive a discount on their solar systems by going solar as a group, and (2) to provide one or more project developers with an extensively pre-screened and well educated group of customers.

Request for Proposals

CPN has identified homeowners that are interested in going solar as a group. We have pre-screened these participants by reviewing each roof via Google Maps to confirm that they are well oriented (either south facing, flat, or low-sloped roofs) and un-shaded. Homeowners have also signed a [Letter of Commitment](#) indicating that they intend to move forward with a solar project with the solar coop. While this document is not a binding commitment to install solar, it indicates participants understand the process and are seriously considering going solar. A spreadsheet of these participants, including their address, is available online via Google Documents. To access this document, contact aaron@vasunorg. CPN will continue to recruit participants for one month after the installer is selected. We expect the numbers of participants to increase significantly by the end of the project cycle.

CPN requests a bid for a single purchase price (\$/watt) for the group of projects. This price will be offered to all of the homeowners participating in the solar coop. Developers may not exclude from their proposals any of the participants involved in this RFP. Proposer does not need to provide individualized bids for each homeowner in this initial bid. If selected to develop the group of projects we will request that Proposer provide individualized proposals for each participant.

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Any additional charges not included in the \$/watt price must be explicitly explained in the proposal (e.g., charges for electrical upgrades, steep roofs, specific roofing types/materials, roof attachment methods/components, multiple array locations, small system size, customized racking, tree trimming, etc.) The assumption is that all costs to most homeowners are factored into the base price, and that an additional charge, if necessary, is reserved for unique homeowner circumstances. We have found that past Selection Committees preferred a single inclusive base price with limited or no additional charges, instead of a lower base price with many additional potential charges. Furthermore, CPN will hold the chosen installer to the bid base price and additional charge prices (or lack thereof).

Although the Selection Committee will look for aggressive pricing in this RFP, price is not the only factor that the Selection Committee will consider. Participants also value experience in the marketplace, quality system components, and strong warranties, among other factors. We do not want the solar coops to be a “race to the bottom” in terms of system price and quality, nor do we want proposers to feel they must sacrifice quality in order to be selected.

The proposer should calculate a fee of \$500 per signed contract to be paid to CPN as a development fee. This fee should be incorporated into the \$/W price, not listed as an adder.

If available, Proposers are strongly encouraged to provide information about solar financing or leasing opportunities for homeowners participating in this solar coop.

A Selection Committee, consisting of homeowners participating in the solar coop, will review the proposals. The Committee will select a single Proposer to develop all of the projects for the group.

The Proposer(s) selected by the group will then provide each homeowner with an individual proposal that lists at a minimum (1) the proposed system size for their home, (2) the total price of the proposed system for their home, and (3) the estimated annual production of the system and the resulting percentage of annual electricity consumption the system is expected to produce. The Proposer will then sign a separate bilateral contract with each of the homeowners represented under this RFP.

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Submission Requirements and Selection Criteria

We request that Proposers answer the following questions in their response to this RFP. Responses will be scored based on the points assigned to each set of questions, with a maximum possible score of 100 points. The scoring of each proposal will be the exclusive discretion of the Selection Committee.

Proposals must be sent to aaron@vasun.org and be received by 4:59pm on Thursday, September 11th, 2014. Late submissions will not be accepted, so please consider submitting before the deadline to ensure all materials have been received by CPN.

When developing your response to this RFP, please adhere to the following formatting requirements:

- Respond to each question in the order it is listed below.
- Provide clear, concise, numbered responses that correspond to each question.
- Provide a **single** PDF document that contains your entire RFP response. You are welcome to provide additional documentation, such as warranties or performance information, at the end of your response. **However, any additional documents must be included in the single PDF, not as separate folders or attachments.**

Keep in mind that the bids will be reviewed by a Selection Committee made up of homeowners. While CPN will provide them technical assistance and support as they review bids and select an installer, they do not have a formal background in solar energy issues. Keeping responses simple, straightforward, and easy to review will make easier for participants to understand and evaluate your proposal.

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Selection Criteria

Competitive Pricing – The extent to which proposed pricing terms are competitive. (30 pts)

1. Provide the base \$/W price the Proposer will offer to all solar coop participants. Please note if there is a minimum system size.

Any additional charges not included in the \$/watt price must be explicitly explained and quantified in the proposal (either \$/W or flat fee) (e.g., charges for electrical upgrades, steep roofs, specific roofing types/materials, multiple array locations, small system size, customized racking, tree trimming, etc). The assumption is that all costs to most homeowners (those already signed up in the spreadsheet of participants) are factored into the base price, and that an additional charge, if necessary, is reserved for unique homeowner circumstances. We have found that past Selection Committees preferred a single inclusive base price with limited or no additional charges, instead of a lower base price with many additional potential charges. Furthermore, CPN will hold the chosen installer to the bid base price and prices for additional charge (or lack thereof).

Please include if the Proposer is able to work on slate roofs, and any additional cost to do so. Please include if the Proposer is able to offer ground-mounted installations, and any additional cost to do so.

2. List any optional upgrades to system components (for example, upgrading to higher efficiency, all black, or American-made panels, different inverters, etc). Some participants have expressed interest in the SMA Sunny Boy 3000/4000/5000TL inverter that provides a limited amount of islanding capability during a power outage. If upgrades are available, please list their \$/W or flat price as well.
3. Some participants have expressed interest in battery storage in addition to PV installation. Please specify if Proposer would offer this option to participants and the estimated additional costs (\$/W or flat price) that participants could expect to incur by having battery storage installed (for an average residential storage system).
4. List any opportunities for financing systems that Proposer will offer participants (optional). If available, include terms for financing.
5. List any opportunities for a Power Purchase Agreement or lease option (optional). If providing such options, please provide the starting \$/kWh price, percentage escalator that would be included in the contract, length of the contract, and any other provisions.

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6. Describe Proposer's incentive processing services, including if Proposer will be responsible for registering system with appropriate entities (public service commissions, PJM GATS, etc) and who will take ownership of system SRECs.
7. Clarify if you will be fully responsible for the cost and work required to secure all permits and interconnection approvals.
8. Please specify any additional cost to the homeowners for securing historic permits, HOA approvals, or other permits or approvals that go above and beyond normal permitting requirements.
9. Should a participant require roof repairs or replacement at a later date independent of Proposer's PV installation, please specify if Proposer is able to remove and reinstall the original PV installation, and at what cost to the participant.

System Quality – The extent to which the Proposer incorporates high-quality components (high CEC panel ratings, American-made products, flashed/non-penetrating attachments, etc) into their system design. (30 pts)

10. Describe and list all model names/numbers of equipment and components Proposer intends to install including panels, roof attachments, type of racking system, and type of inverters. If you offer multiple options for panels (i.e. American-made vs. not American-made), inverters (i.e., central inverters vs. micro-inverters) or roof attachments/racking, please specify components and costs for each option.
11. Describe if proposed system components offer online monitoring, and if such services are included in the cost of installation. Please specify if such monitoring would be on the system level or panel-by-panel.
12. Describe preferred roof attachment methods and components for flat and low-sloped roofs.

Proposer Experience & Qualifications – The extent to which the Proposer demonstrates a track record of quality work and incorporates photovoltaic technologies in line with industry standards. Experience in the Virginia market a plus. (20 pts)

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13. Describe Proposer's prior experience designing PV systems and detail the number of distinct projects the Proposer has constructed in Virginia. If none, please number your other project experience and their locations.
14. Provide three (3) customer references from customers who worked with Proposer during the installation phase.
15. Describe Proposer's experience with Virginia permitting, Virginia system interconnection, and any other work with Virginia government agencies. Provide Proposer's Virginia license number.
16. Some participants will require new roofs before/in conjunction with the solar installation. (Optional) Please specify if Proposer is able to do roofing work or if Proposer will partner with a roofing company to have roof repair/replacement included as part of solar installation costs. Provide either Proposer's experience with, or partner roofing company's information and experience with, roof repair/replacement in conjunction with solar PV installation.
17. Please describe the company's key personnel and the number of staff people that will be dedicated specifically to this solar coop project. Please indicate the role that each staff member will play in: scheduling site visits, completing site visits, drafting proposals, issuing and tracking participant proposals, scheduling installations, coordinating installations, and general administrative work that accompanies managing a large group of participants. Please include the phone numbers and email addresses for a primary and a secondary point of contact for the solar coop project.

Our goal is to understand how your organization will staff and coordinate an additional 40-100 leads in a short time frame.
18. Describe the timeline in which you anticipate completing the proposed projects. Indicate if you will commit to completing the project in a certain amount of time after each contract is signed.
19. Describe insurance, bonding, number of years in business, and any other relevant information relating to the company's stability and standing.

System Warranty – The extent to which the Proposer offers strong warranties on system components and labor. (12 pts)

20. Describe warranty provided for system panels.

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21. Describe warranty provided for inverters.
22. Describe warranty provided for Proposer's labor and workmanship.
23. Describe impact of solar system installation to existing warranties on homeowner roofs.
24. Describe commitment to customer service beyond completion of installation.

Social & Community Benefits – The extent to which the proposed solar PV systems foster social and community development, including hiring Virginia-based workers and offering local job training opportunities. Preference will be given to locally-owned companies. Active membership in MDV SEIA, our partner on policy issues, is also a plus. (8 pts)

25. Provide location of Proposer's nearest regional office.
26. Please describe any commitments you have made or are willing to make regarding local engagement. For example, will you provide on the job internships or other training opportunities for solar job training programs?

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Q&A Process

CPN will act as the point of contact for all solar coop and RFP related questions on behalf of the participants covered under this RFP. VA SUN Program Director, Aaron Sutch will manage all communications. Please submit any questions and/or comments to him via email at aaron@vasun.org. Proposers that contact participants directly for any reason will be disqualified.

About CPN

Community Power Network (CPN) is a network of grass roots, local, state, and national organizations working to build and to promote locally based renewable energy projects & policies. Our team has extensive experience using project development, community organizing, and policy building to catalyze equitable solar deployment in the National Capital Region

Timeline

1. RFP Issue Date: August 19, 2014
2. Proposals Due: September 11th, 2014 by 4:59pm
3. Selection Committee Meeting: Week of September 15, 2014
4. Notice of Intent to Award: September 22, 2014
5. Contract Negotiations Completed: September 24, 2014
6. Deadline for new participants to sign up: October 31, 2014
7. Deadline for all site visits to be completed: November 14, 2014
8. Deadline for all proposals to be provided to participants: November 21, 2014
9. Deadline for all signed contracts: December 12, 2014