

REQUEST FOR PROPOSALS

Solarize Johnson County, Iowa Group Buy Program Spring/Summer 2018

INSTALLATION OF RESIDENTIAL AND COMMERCIAL SOLAR ELECTRIC SYSTEMS

Date of Issue: February 1, 2018

Proposal Date Due: February 23, 2018 at 2pm CST

Issued By: Midwest Renewable Energy Association

RFP Point of Contact: Peter Murphy, Solar Program Manager
Midwest Renewable Energy Association
3628 W Pierce St. Milwaukee, WI 53215
peterm@midwestrenew.org

INTRODUCTION

Midwest Renewable Energy Association (MREA) is seeking qualified firms (“Proposers” or “proposing firms”) to submit proposals for a Group Buy Program for the design, procurement, and installation of new, residential and, potentially, small commercial, direct-owned photovoltaic systems at a per-watt price lower than the typical, single solar electric installation.

The group buy is being led by Midwest Renewable Energy Association. The goal of the group buy is to increase solar education and installations in all of Johnson County, Iowa, (including West Branch) through a group purchase involving free information sessions and a competitive proposal process. The group-based pricing structure must incentivize participation through lower prices as the number of participants or kW capacity rises. MREA creates and manages a central website to publicize the group buy program.

Between 2013 and 2017, the MREA facilitated fourteen Solar Group Buys around the Midwest, reaching over 4,000 individuals with our Solar Power Hour information sessions, and leading to more than 3,700 kW on nearly 600 properties. Among those property owners who received assessments/estimates for installations through these programs, the average proportion to ultimately add solar to their property through the program has been 40.85%.

The group buy involves MREA and the full support of Johnson County, Johnson County Conservation, Johnson County Public Health, and the cities of Coralville, Iowa City, North Liberty, Shueyville, Solon and West Branch with MREA and Johnson County leading widespread publicity and awareness in the area.

ABOUT THIS RFP

The intent of this RFP is to select one or more firms to provide site assessment/estimates and system design, procurement and installation services for eligible participants of the group buy. Proposing firms are invited to submit proposals individually or collaborate with another firm to submit a joint proposal.

As a result of this solicitation, qualified solar installation contractors may enter into a Master Service Agreement (“Agreement”) with MREA. The Agreement will set forth the terms and conditions under which a contractor will provide site assessments/estimates and design, procure, and install residential and commercial solar systems for group buy participants. Installations shall be completed and energized before December 31, 2018, unless an extension is granted by MREA.

Additionally, MREA reserves the right to select two contractors to ensure quality customer interaction. To select a contractor, MREA may negotiate with or solicit quotes from one or more contractors qualified under this RFP. Nothing in this solicitation process, RFP, or any contemplated or final agreement relieves any qualified vendor from complying with all laws and regulations applicable to the agreement.

QUESTIONS RELATED TO RFP

Questions, including requests for explanations of the meaning or interpretations of the provisions of the RFP, **shall be submitted in writing (via email)** to the RFP Point of Contact Peter Murphy at peterm@midwestrenew.org by 2/14/2018 at 2:00 pm CST. Questions and answers will be posted to <https://www.growsolar.org/news-item/request-proposals-johnson-county-iowa-solar-group-buy> as they are received, with no additional questions accepted after 2/14/2018 at 2:00 pm CST.

PROPOSAL DUE DATE AND SUBMITTAL

Proposals must be received no later than 2/23/2018 at 2:00 pm CST. Proposals must be submitted electronically by email to Peter Murphy at peterm@midwestrenew.org. All emailed proposals will generate an emailed response within one business day confirming receipt of the proposal. If you do not receive a confirmation email, please email peterm@midwestrenew.org or call 414-988-7963. Proposal content is outlined on page 5, and templates for two required Exhibits (B and C) are also provided in this document.

In order to maintain the fairness and integrity of the selection process, proposals must conform to the requirements of this RFP. All communications shall be through the RFP Point of Contact listed on the RFP Cover Sheet. Communications with members of an evaluation committee (Advisory Committee) for the purpose of unfairly influencing the outcome of this RFP may be cause for the proposal to be rejected and disqualified from further consideration.

ADVISORY COMMITTEE

The selection of the contractor will be made by the Group Buy Advisory Committee, which consists of representatives from Johnson County Planning, Development and Sustainability (PDS); Johnson County Conservation; City of Coralville; City of Iowa City; City of Shueyville; and City of West Branch.

The Solar Group Buy Advisory Committee is responsible for selecting one or more firms to provide assessments/estimates and design, procure, and install PV systems for participating home and commercial building owners. During the evaluation process, the Advisory Committee has the right to require any clarification they need in order to understand the Proposer's approach.

SOLAR GROUP BUY TIMELINE

Participant Registration	April, 2018 to August 31, 2018
RFP Announced	February 1, 2018
RFP Questions Due/Posted	February 14, 2018
RFP Proposals Due	February 23, 2018
Firm(s) Selected	March 23, 2018
Solar Power Hours Held (MREA provides speaker/presentations)	April through July, 2018
Participant List Available to Contractor	Ongoing
Site Assessment/Estimate Provided to All Participants Who Request One	April through August 31, 2018
Participants Make "Go" or "No Go" Decision	April through August 31, 2018
Installations Begin	Ongoing
Installations Completed	December 31, 2018

PROPOSING FIRM REQUIREMENTS

Proposing firms are responsible for carefully reading all the terms and conditions contained in this RFP and for

following the instructions given. Proposals that do not contain all the information requested may be rejected as non-responsive. Proposers must review the entire RFP to ensure that all required information is included in their proposal.

PROPOSING FIRM QUALIFICATIONS

Proposers must meet the minimum qualifications described in this section to participate. The determination of whether a proposing firm meets the minimum qualifications will be based on the complete proposal.

Required:

- Installation firms **must** have at least one employee who is a North American Board of Certified Energy Practitioners (NABCEP) Certified PV Installer and will remain certified during the course of the program. Firms that do not have a NABCEP Certified PV Installer on staff may submit a proposal jointly with a firm that does.
- Proposers must be, or contract with, an electrical contractor that must have licensure requirements for the State of Iowa.
- Proposers must carry insurance and be bonded.
- Proposers must respond to each section of this Request for Proposals and use the outline provided below (pages 5 through 8 beginning with “cover letter”) as a guide for formatting proposals.
- Proposers will provide a group-based pricing structure that incentivizes participation through lower prices as the number of participants or kW capacity rise.

Preference Given To:

- Installation firms where the primary place of business is located in Iowa.
- Installation firms that have a Master Electrician on staff.
- Installation firms that have an online site assessment scheduling tool on the firm’s website.
- Installation firms that offer a Power Purchase Agreement option.
- Installation firms that provide financing options for solar arrays.

PROPOSAL SCORING & EVALUATION

The Advisory Committee shall evaluate each proposal based on the categories outlined below in the checklist. Proposal ranking will be the central evaluation in determining successful applicants and final award. All Proposers will be notified of the outcome of the selection.

CONDITIONS AND RESERVATIONS

MREA and the Advisory Committee are not obligated as a result of the submission of a Proposal to enter into an agreement with any Proposer, and have no financial obligation to any Proposer arising from this RFP. All Contracts will be executed between the home or commercial building owners and the selected contractor. Home and commercial building owners are not obligated to use the selected contractor for any services and may still choose other contractors.

The Contract between the owner and the selected firm will state that MREA, Johnson County, and the Solar Group Buy Advisory Committee are not parties to the Contract, and that 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 an Agreement with MREA to confirm each organization's roles and responsibilities prior to work starting.

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

- Amend, delay or cancel the RFP without liability if the Advisory Committee 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 upon finding that it is in the best interest of the project to do so;
- Waive any minor informality or non-conformance with the provisions or procedures of the RFP, and seek clarification of any Proposal, if required;
- Reject any Proposal that fails substantially to comply with all prescribed RFP procedures and requirements;
- Negotiate and/or amend the Scope of Work to serve the best interest of the project

SOLAR GROUP BUY 2018 PROPOSAL CONTENT

PROPOSAL FORMAT AND EVALUATION CRITERIA

Please create project proposals in 8½" x 11" document size using a minimum 12-point font size. Proposals should be submitted as one PDF file, or, if multiple files are required, one ZIP file containing the proposal folder and files. Proposals shall not exceed 25 pages, including cover page, cover letter, exhibits B and C and any appendices and/or attachments. The sample customer assessment/estimate and sample customer contract do not count toward your 25-page maximum.

Proposal Checklist:

- 1. Cover Letter**
- 2. Firm Profile**
- 3. Qualifications**
 - NABCEP certified staff member**
 - Any Subcontractors**
 - Proof of insurance/bonding**
- 4. Business Practices**
 - Sample Customer Assessment/Estimate**
 - Sample Customer Contract**
- 5. Work Quality**
- 6. Customer Service**
 - References**
- 7. Point of Contact**
- 8. Appendix (Optional)**
- 9. Exhibit A (informational only)**
- 10. Exhibit B (fill out and sign)**
- 11. Exhibit C (fill out)**

I. Cover Letter

The cover letter shall discuss the highlights, key features and distinguishing points of the Proposal. As part of this discussion, please describe specifically why you want to work with MREA and Johnson County. The cover letter must be prepared and signed by a manager having the authority to make offers and enter into financial agreements on behalf of the firm(s).

II. Proposing Firm Profile

- A. Detail the proposing firm size and local organizational structure. Describe the demonstrated experience of the firm in developing, designing and installing residential and commercial solar electric systems, and how that would apply on a community-wide scale.
- B. Provide a statement describing the firm's capability to complete the project per the project timeline specified above. Include a discussion of the firm's financial stability, number of employees, length of time in business, capacity, and resources. Include any website or marketing support your firm plans to provide for this project. (As noted earlier, MREA will maintain a central publicity website for the program.)
- C. Explain how the firm can expand quickly if necessary—and maintain quality—to meet the large demand that may occur due to this project. Present your plan to accommodate large demand within the timeline stated above. If possible, provide two examples of projects completed to date which have prepared the firm for an undertaking of this scale (potentially 15 to 85 installations).

III. Qualifications of the Project Team

- A. Fill out and sign Exhibit B.
- B. Identify key personnel for this project including roles, experience, licenses and certificates, with corresponding numbers as appropriate. Key personnel should include at a minimum: Owners; Project Managers; Designers; Installers and Office Manager who will provide data to homeowners per the specifications outlined in the Scope of Work (see **Exhibit A**). Include NABCEP Certification information here, as well as any Master Electrician or other certified staff involved in this project. Indicate when certifications expire and, if applicable, plans for renewal. Include proof of insurance/bonding.
- C. Identify any subcontractors you plan to use, along with their value to the project, and provide background information on size, experience, management, licensing, and subcontracting agreement.

IV. Business Practices

- A. Lead management practices: Describe the process for in-office management of a large volume of leads, scheduling of site assessments and installations, and processing of relevant paperwork.
- B. **Please provide a sample site assessment and cost estimate that is representative of what program participants will receive from you as the selected installer for the program.**
- C. **Provide a sample customer contract tailored for use with this group buy program that includes a description of your terms of payment, process, and timeline, from initial deposit to final payment. Customer contract must also provide production credit in the event installation ends on or after 1/1/19 according to production estimates given to customer in site assessment and cost estimate (systems installed before 1/1/19 but interconnected after 1/1/19 do not need production credit).** *(Note: All Contracts will be executed between the home or small commercial building owner and the selected contractor. The Contract between the owner and the selected firm will state that the Midwest*

Renewable Energy Association or the Advisory Committee are not parties to the Contract, and that the selected contractor will be solely liable for any claims, losses or damages arising out of the Contract.)

- D. Please describe any financing options your company provides (or partners with a lending institution to provide) to customers who intend to finance their solar array.
- E. Change orders: Describe how the firm addresses change orders. Please provide an example of a recent change order and how it was priced, tracked, and managed.
- F. Work practices: Address the firm's health and safety record and practices. Identify any communications with Labor and Industries regarding workplace issues in the last 3 years.
- G. Demonstrate familiarity with permitting fees and requirements in relevant local jurisdictions.

V. Work Quality

- A. Explain why the products included in your response to this proposal are appropriate for this project. Provide descriptions of warranties and support that ensure the long-term durability, operation, and maintenance of PV installations. Include performance and reliability figures, in addition to where the products were manufactured.
- B. Describe the installation process, including how you will minimize disruption and disturbance of neighbors, landscaping, structures, and clients' living arrangements during preparation, installation, and clean-up.
- C. Describe final testing and sign-off procedures, including punch lists, inspection, and other necessary requirements.

VI. Customer Service

- A. Describe how you plan to handle incident reports (property damage, warranty, service calls, and inquiries). Discuss your typical response time on calls, hours of coverage for customer service calls, and process for providing status reports after an incident is logged.
- B. List any complaints received by the Better Business Bureau over the last 3 years.
- C. Describe the training you provide the homeowner, including materials or manuals, customer care books, and/or support for later questions and system performance.
- D. Describe approach to encourage energy efficiency.
- E. Provide references from at least 3 recent residential and/or commercial installations including size, date of installation, and location, with a contact name and telephone number.
- F. **Note:** Proposing installer must abide by the SEIA Solar Business Code:
<http://www.seia.org/policy/consumer-protection/seia-solar-business-code>

VII. Working with the Midwest Renewable Energy Association and Solar Group Buy Advisory Committee

- A. Identify the main point of contact at the proposing firm.
- B. Confirm this individual's ability to **provide weekly progress reports** per the specifications outlined in the Scope of Work (see **Exhibit A**).

VIII. Appendix

- A. You can provide an Appendix to include any supporting information, such as resumes, references or other data that will support your firm as the best for this project. Any pages in the Appendix count toward the maximum allowed length of 25 pages for the entire proposal.

IX. Pricing schedule

- A. Using **Exhibit C**, Proposers should present pricing as price-per-watt of installed capacity, exclusive of any eligible incentives or tax credits for a grid-tied system installed on a typical dwelling. The price is to apply to all work described in Scope of Work identified in Exhibit A.
- B. Provide per-watt pricing for each module/inverter combination offered as a tiered structure based on the total installed capacity of all systems. The tiered structure is to be based on four tiers as indicated in Exhibit C.
- C. You can provide up to three equipment pricing options in Exhibit C. You do not need to provide three.
 - At least one of the systems you provide cost estimates for must have U.S. made modules.
 - Proposers may also provide the cost estimate of a battery-based system (in the “Additional Cost Factors” section).
- D. Identify any potential additional costs by pricing Adders in Exhibit C to establish fixed costs for potential solar array peripherals.
- E. Pricing based solely on specific individual system size will not be considered.
- F. **Note:** Include all your anticipated costs of customer development in this RFP. Customer communication, site assessments, system design and estimate development should be factored into the final pricing you propose. **(Thus, there is no charge for homeowners to have a site assessment and estimate from the selected contractor – it is all in the final estimate price).** You must calculate any costs associated with system design and a site visit into your price-per-watt pricing in Exhibit C.
- G. **Note:** An administrative fee of \$5,000 will be due from the selected firm upon selection. A \$5,000 check should be made out to the Midwest Renewable Energy Association. The fee is designed to cover programmatic administration costs. This is the equivalent of \$.10/w for 50 kW. In addition to the \$5,000, a \$.10 per watt fee will be applied for contracted installations above 50kW. This \$.10/watt fee will be paid to the MREA after installations are completed. It should be reflected in your Proposal provided in Exhibit C. (For example, if you are providing a proposal cost of \$4.00/watt for install costs, your final cost should actually be \$4.10/watt.)
- H. **Note:** The MREA will provide each participating home or business owner (those who install solar through the program) with a 1-year complimentary membership.
- I. **Note:** Special considerations may be required for placement of solar installations on historic properties.

EXHIBIT A SCOPE OF WORK

The selected firm will provide for design and installation of residential and commercial solar electric systems for a group of Johnson County (including West Branch), Iowa, residents in accordance with the general scope of services outlined below. Proposers may use this outline as a guide for organizing a scope of work for their proposal, but are encouraged to expand upon, refine or suggest alternative approaches based on previous experiences with similar projects.

The purpose of this project is to enable the installation of solar photovoltaic systems on homes and commercial buildings in Johnson County at a per-watt price lower than that typically offered by the firm. The selected firm will access cost efficiencies through a program which combines lowered customer acquisition costs with group purchasing and installations.

Between the months of April and July 2018, MREA and program partners will promote and deliver educational workshops (Solar Power Hours) at easily accessible public locations. As prospective participants are identified who wish to proceed with the process, their names and contact information will be provided to the selected firm. If more than one firm is selected, MREA and the Advisory Committee will refer prospective participants to the firms in an equitable manner determined at the time of firm selection.

The selected firm must provide **weekly progress reports or a progress report updated weekly** to the MREA regarding campaign progress and lead status. Progress reports should include the following:

- Name, address, phone, and email as available for each lead
- Date for status changes of each Lead and sum of all statuses
 - Contacted
 - Declined Site Assessment
 - Scheduled Site Assessment
 - Cost Estimate Sent
 - Contract Signed
 - Cost Estimate Declined
 - System Energized
 - Type of System
 - Size of System
 - Price of System

The selected firm(s) will provide site assessments and system design estimates for each participant free of charge. Individual system designs should be aesthetically pleasing, taking into consideration the preferences of the owner while minimizing project costs and maximizing solar energy production. System estimates should also take into consideration each owner's self-identified financial limitations including, if applicable, any owner-arranged financing with a bank, credit union or other financing entity.

The installations will be carried out by the selected firm in conformance with all applicable laws, codes, and interconnection requirements for net-metered installations in the resident or business utility service area.

For each participating home or small business, the selected firm will be responsible for:

- securing all required permits (typically building and electrical permits),
- completing and submitting all incentive applications,
- scheduling and passing all inspections,

- providing guidance and assistance to each contracted owner with completing a net-metering agreement with the resident or business utility service,
- providing each owner with the information regarding energy efficiency,
- providing each owner appropriate documentation and assistance with applying for the Solar Energy Systems Tax Credit (state of Iowa), the federal residential solar energy tax credit and where applicable federal commercial asset depreciation tax credit,
- providing introductions and support materials to banks, credit unions, and other interested financing entities as needed.

Note: To ensure that participants in the group buy are receiving complete and accurate site assessments and cost estimates, MREA reserves the right to review site assessments and cost estimates given to potential customers as part of the program.

Note: Program may be extended to another round of group purchase at mutual consent of MREA and selected Installer.

EXHIBIT B
PROPOSING FIRM QUALIFICATION STATEMENT

Proposing Firm Qualification Statement:

I, _____, have read the entire contents of the RFP, and certify that Proposing Firm has necessary purchasing contacts, equipment, storage facilities, experience, ability and capital to furnish the proposed products in the manner described and to perform the required work satisfactorily.

Authorized Signature: _____ Date: _____

Title of Signatory: _____

I acknowledge that Proposing Firm possesses the following certifications / qualifications: (Check appropriate boxes to indicate compliance.)

- Certification through NABCEP (required)
- Proof of insurance/bonding (required)
- Master electrician on staff (not required, but preferred)
- Primary place of business located within Iowa (not required, but preferred).

Authorized Signature: _____ Date: _____

Title of Signatory: _____

I certify that Proposing Firm agrees to abide by the SEIA Solar Business Code: <http://www.seia.org/policy/consumer-protection/seia-solar-business-code>.

Authorized Signature: _____ Date: _____

Title of Signatory: _____

Proposing Firm declares the following legal status in submitting this proposal:

- () A corporation organized and existing under the laws of the State of _____
- () A partnership
- () An individual doing business as _____

Company Name FEIN

Address City/State/Zip Code

Proposing Firm's Signature Name & Title

EXHIBIT C

SOLARIZE JOHNSON COUNTY

Baseline cost per watt price assumes:

1. Cost for major system components (modules, inverter) – must be new. Solar electric modules and inverters must be listed here: www.gosolarcalifornia.ca.gov/equipment/index.
2. Standard racking and mounting hardware and wiring
3. Flush mount systems
4. Cost of complete site assessment/estimate for each program enrollee
5. \$5,000 administrative fee which will be paid to the MREA
6. \$0.10/watt fee (after program total exceeds 50 kW) which will be paid to the MREA.
7. Installation of net metered system
8. The system must include at least a *five-year installation warranty* that covers any defects in the workmanship of the installation at no charge to the owner. The warranty must be provided by the contractor that installs the solar electric system.

What is NOT included in baseline price:

1. Costs related to analysis of any structural improvements that may be needed for a home
2. Electrical work that may be required beyond basic interconnection of solar installation (costs incurred by participant to bring electrical system up to code, for example)
3. Upgrades as requested by the program participant (see below)
4. Unusual permit or high permit costs (e.g. related to historic preservation permits or high solar permitting fees in a jurisdiction).

EXHIBIT C (cont'd)
SOLARIZE JOHNSON COUNTY

Proposer Firm Name	
Contact Name	
Contact Email	
Contact Phone	
Date	

BASELINE PROPOSAL INFORMATION (ASSUMES ROOF MOUNTED ARRAY)

PV System Equipment Information			Total Participant Capacity (KW)				
System	Modules	Inverter	<50 KW	51-150 kW	151-250 kW	251-350 kW	>350 KW
EXAMPLE	Solar World 275W	SMA 4KW Sunny Boy	\$	\$	\$	\$	\$
1							
2							
3							

Additional Cost Factors (if any)	Increased Cost (\$/watt)	Flat Rate Adders (\$)	Description
Battery backed			
Roofing - Metal			
Roofing - Spanish (clay) tile			
Roofing - Concrete tile			
Roofing - Wood Shake			
Roofing - Flat (torch-down)			
Roofing - Single-ply membrane			
Roofing - Foam			
Roofing - Tar and Gravel			
Slope - angle exceeding 30 degrees			
Height - Building exceeding 2 stories			
Height - Cost adder			
Electrical - Line Tap			

Electrical - Full Panel Upgrade			
Electrical - DC Disconnect (roof-mounted)			
Electrical - Interior conduit run			
Structural - Rafter bracing			
Structural - Pole or Ground Mount			
Structural - Trenching			
Permitting - Allowance Commercial			
Permitting-Structural			
System - Micro-Inverter			
System - Monitoring			
Ex. Small system adder			
Ex. Large system cost subtraction			
Premium modules (High Efficiency)			
Premium modules (All American made)			
Multiple string inverters (Ex. SMA)			
Obstruction - Vent pipe removal			
Multiple roof arrays			

(Proposing firm may add more rows if necessary.)