



Solarize Rhode Island Installer Request for Applications

April 13, 2017

Rhode Island Office of Energy Resources
1 Capitol Hill
4th Floor
Providence, RI 02908
Energy.Resources@energy.ri.gov

1. Opportunity Summary

The Rhode Island Office of Energy Resources (OER) is a state agency dedicated to the mission of leading Rhode Island to a secure, cost-effective, and sustainable energy future. OER has partnered with the Rhode Island Commerce Corporation (Commerce RI) and a soon to be identified marketing consultant to issue this Request for Applications (RFA) from qualified Solar Photovoltaic Installers (PV Installer(s)) to participate in the Spring 2017 round of Solarize Rhode Island.

The Solarize Program will drive community adoption of solar PV projects through a partnership focused on localized marketing and installation efforts which, in turn, will help drive down the installation costs of small-scale solar PV installations within the selected community through a group purchasing model. The Solarize Rhode Island program has been tremendously successful, as demonstrated by the recent 2016 Spring Solarize program that resulted in over 100 signed contracts across three Ocean State communities. For additional background information on Solarize Rhode Island, please visit: <http://www.energy.ri.gov/renewable/solarize/>

The Solarize Rhode Island Team is comprised of staff from OER, Commerce RI's Renewable Energy Fund team, and a marketing consultant. These entities also serve as Program Administrators. Additional information regarding the role of the Program Administrators can be found in Sections 4 and 6 below.

OER and Commerce RI will soon be going out to bid for a marketing consultant for the education and marketing to the up-to-five communities participating in the spring round of Solarize RI. The marketing consultant, up contracting, will then officially join the Program Administration team.

2

OER seeks applications from Installer(s) that can provide competitive, tiered pricing for a direct-ownership model (Purchase Price), along with an optional leasing or power purchase agreement (PPA) model (Lease/PPA Price) for residential and small-scale commercial solar PV installations specific to the Solarize RI program. Innovative Financing Models are also welcome, such as solar loans. However, it is expected that all installers will provide tiered pricing for a direct purchase system. It is also expected that customers who purchase a system under the program will receive competitive tiered pricing that results in a progressively greater reduction in the total purchase cost as more people contract for solar PV in the community. Customers who enter into PPAs or Leases will receive a greater financial incentive from the Installer(s) as higher tiers of aggregate capacity within a community are reached.

A consortium consisting of more than one installer may bid collectively on the selected communities provided that the consortium agrees to be identified by a single name (e.g., Solarize – Community Name - Installer Consortium) in the contracting process. The Consortium will be bound by the same tiered pricing structure and establish protocols for the consortium with regard to the assignment of individual projects to participating installers.

Applications received from an Installer, or a consortium of installers, will be evaluated in order to provide the selected communities with the greatest opportunity to succeed in the Program. OER, Commerce RI, the marketing consultant and the External Review Team identified by selected communities will work to review the Installer applications. Quality of the application, proposed equipment, experience of Installer (or consortium) installing solar PV projects, number of installations completed regionally and in Rhode Island, pricing and installation practices will be factors in the selection process. The selection team may also perform reference checks to ensure positive customer

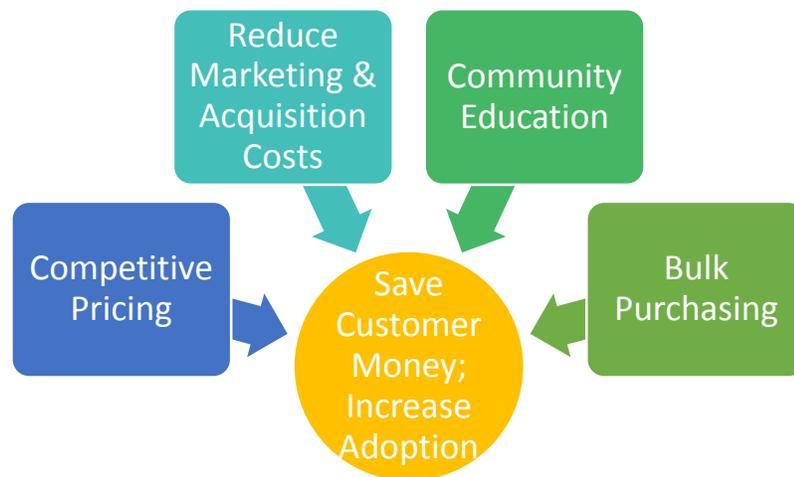


satisfaction from past solar installations. An interview by the Program Administrators and the External Review Team with the top three installers or consortium may also occur. Refer to Section 5 for more information regarding the interview process. It is expected that the Program Administrators and Community External Review Teams will choose one installer to work within the selected communities during the program.

2. Program Description

The aggregation of multiple small-scale solar PV installations within a community provides opportunities to realize economies of scale for the Installer and reduce customer acquisition costs, which can lead to cost savings for end use consumers. Installation prices for small-scale solar PV installations are generally higher than for large-scale installations due, in part, to the extra cost of customer acquisition. By educating the local community, streamlining marketing efforts, and aggregating sales, the Solarize RI Program will help make solar PV a more accessible and affordable energy option.

3



3. Community Selection

The Program Administrators have issued a Request for Application to Rhode Island cities and towns to participate in the Spring 2017 round of Solarize. Up to five (5) Communities may be selected. This RFA refers specifically to the Spring 2017 program. OER, Commerce RI, and the marketing consultant will provide each selected community in the Program with education and marketing support, including free educational meetings and marketing plan development support to help implement their marketing and outreach plans. Each Community marketing and outreach plan provided as part of their applications will be available on the OER website for review ten (10) days prior to the date the RFA for installers is due.¹ See Section 12 for more information about marketing and outreach plans.

4. Program Administrators – Program Marketing Support

OER, Commerce, RI and the marketing consultant will assist the selected Communities and the selected Installer(s) to deploy a marketing strategy to enhance local interest in solar PV technology, as well as

¹ This is subject to change. Check the OER Solarize website for program timeline changes.



alleviate some of the marketing and acquisition costs for the Installer associated with small scale PV installations.

Specifically, the Program Administrators will:

- a. Work with the selected Communities to develop and implement the outreach and marketing plan specific to the Community's application. This will include event organization, creating a calendar of events, coordination of solar workshops, creation of websites and social media campaigns, as well as designing and printing of standardized marketing materials.
- b. Assist with developing a training guide and facilitate trainings for the selected Community's Solar Ambassador(s) and other members of the volunteer team, if requested or necessary. The Solar Ambassador will be the "lead volunteer" and will support the marketing consultant for event coordination. They will be one point of contact for local residents who express interest in the Program. The selected installer(s) will be expected to assist the Program Administrators in helping train the volunteer team on the basics of Solar PV, answer questions posed by the team, and work with them to generate leads during the course of the Program.
- c. Participate in certain outreach measures and events, including but not limited to, strategic community meetings such as a Program Kickoff Event and educational meetings where all stakeholders, including the selected Installer(s), will meet with residents to increase awareness of solar energy and its benefits.
- d. Convene bi-weekly meetings or conference calls to coordinate between the Community and Installer outreach activities.

4

5. Installer Selection

Through this RFA, the Program Administrators and the selected Community will select and partner with a solar PV installer that offers sales models in which installation costs are based on a tiered pricing structure that provides a lower installed cost per watt as the amount of contracted solar PV within the community is increased. The chosen Installer(s) will also provide free solar site assessments (with site visits and/or desktop analysis, as appropriate), an optional PPA or lease price, and installation services. In addition, the selected Installer(s) will be responsible for managing leads, providing comprehensive customer service, submitting weekly metrics to the Program Administrators, and serving as the "technical expert" regarding solar PV to the selected Community.

Installer(s) that can provide demonstration of innovative concepts will have additional scoring weight (See Section 14 for Evaluation Criteria). The definition of innovative concepts include, but are not limited to, innovative business models or provide options for the installation of other technologies such as solar domestic hot water (SDHW) or access to additional creative financing options. Note that should an installer offer the ability to install SDHW projects, those projects will not count toward the tiered price.

OER will perform a threshold review to verify that all applications are complete, as well as a substantive review to ensure that each application demonstrates the installer's (or consortium's) capacity to deliver on the Program's objectives. OER will then provide the applications to the External Review Team for



evaluation. The External Review Team will consist of three members of selected Community’s volunteer team and one member of each of the three Program Administrator agencies.²

External Review Team	
Selected Community	3 team members
OER	1 team member
Commerce RI (REF)	1 team member
Marketing Consultant	1 team member

The Program Administrators will work with the selected Community review team to identify a short list of installers with which they prefer to work. Those installers on the short list may be invited to the Installer Interview Day. The Program Administrators will host the Interview Day, on June 5, 2017 during which the External Review Team will have the opportunity to interview the short list of installers. However, at a minimum, at least one member of the three selected Community’s External Review Team members will be present during the Interview Day. **Installer(s) must be available to meet with the Review Team on June 5, 2017.** At the completion of the Installer Interview Day, the External Review Team will have a chance to reevaluate their ranking of the interviewed installer(s). The revised ranking sheets will be discussed among the External Review Team. The selected Community and the Program Administrators will then select the Installer for the Solarize program for that respective Community.

5

6. Program Roles and Responsibilities

Once the Spring 2017 Solarize campaign has launched, interested customers in selected Communities will be able to contact the Installer and sign up for a free site assessment. If the customer’s site is deemed feasible for solar, they will have the option to contract with the Installer before the Program deadline. The Installer will be responsible for assessing individual sites, responding to all customer inquiries about site suitability for solar, providing a plan for customers who do not have good site for solar, working with interested customers to design appropriate systems, presenting financing options as needed, and contracting with the customer for installation of the solar PV system. The selected Installer is also responsible for submitting all paperwork needed for the necessary permits and interconnections.

Residential and small commercial customers who choose to participate in the Program may be eligible for the REF Small Scale Solar grant program, as long as the project meets the REF requirements. Slightly larger commercial customers who choose to participate in the Program may be eligible for the REF Commercial Scale program. However, it is up to the Installer if they will allow large commercial projects to count towards the Solarize program tier. Please indicate in the application program plan narrative if you intend to offer commercial installations through the REF Commercial Program. All REF applications must include an Adder Form, (see Sections 11 and 12.c.viii. regarding adder forms).³ The selected Installer(s) must offer customers the REG program if their site does not qualify for the REF program.⁴ For projects eligible for the Small Scale and Medium Scale REG Programs, Adder Forms must

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

³ If the REF no longer has funding during the Spring Solarize program, the funding option does not need to be presented to potential customers.

⁴ A residential or commercial project is eligible for either the REF or REG programs, but not both.



be submitted to OER after the project is installed and interconnected.⁵ Other information not collected by National Grid may be requested by OER for REG projects. It is up to the Installer if they will allow Medium Scale projects to count towards the Solarize program tier. Please indicate in the application program plan narrative if you intend to offer commercial installations through the REG Commercial Program. It is not expected that systems larger than 250kW will be applying to the REG Commercial and Large Scale Solar programs for Solarize Rhode Island. However, if a community solar project is proposed as an innovative business model, please indicate if it will apply to the REG Commercial or Large Scale solar program.

The weekly metrics submitted each week to OER must indicate which incentive program each customer will be applying for. Both REG and REF projects must be completed within one (1) year of award from either incentive program.

It is expected that the tiered pricing proposed as part of the Installer’s application to the customer will be relevant for whichever incentive program the customer signs a contract for. It is the installer’s responsibility to help homeowners and business owners make an informed choice about which incentive program is best for their site and financial situation. Installers must offer both the REG and REF programs to any leads generated by the Solarize RI program.⁶

6



⁵ The REG application to National Grid is the interconnection application - https://www.nationalgridus.com/non_html/RI_DG_Exhibit_A_RE-Growth.docx

⁶ Should funding not be available for the REF, this requirement will not apply.



Figure 1. Anticipated roles of the different parties in Solarize Rhode Island.⁷

Chart 1 below outlines the roles of different parties participating in Solarize Rhode Island.

	OER/ Commerce RI/Marketing Consultant	Selected Community	Installer(s)
Procurement	Release RFA to select Installer(s) and determine if applications meet threshold requirements; Work with communities to select Installer(s)	Work with Program Administrators to evaluate applications and lead in the selection process	Submit competitive applications
Reduce Cost to Customer	Make available solar incentives ⁸ ; Assist residents in evaluating finance mechanisms for solar PV installations; Provide financing products and tools	Increase awareness of solar PV to drive down marketing and customer acquisition costs; Assist Program Administrators in streamlining the permitting process (if possible)	Provide competitive tiered pricing
Marketing	Provide Marketing and Education Toolkit to selected Communities; Facilitate Community group outreach planning; attend and support key community events	Reach out to local community organizations, potential partners, and volunteers; Organize and mobilize community networks over the course of the Program; Demonstrate municipal support for Program	Partner with community/civic groups, Solar Ambassador and other volunteers to disseminate information on Program (as appropriate)

7

⁷ National Grid is not directly involved in the Solarize RI program. However, applications to the REG program and interconnection information related to REG projects in the Solarize program will be shared with OER.

⁸ Commerce RI makes no guarantee that all applications to the REF Small Scale Solar Program will receive a grant. See Section 8.



Education	Educate community/civic groups, Solar Ambassador, and volunteers on solar PV basics; Facilitate local Solar presentations	Serve as point for questions of program mechanics and basic solar information; Utilize community communications vehicles or outreach and education	Serve as the technical expert on solar; Present at Solar Workshops
Communication	Provide a Solarize RI website with town specific pages; Identify communications opportunities and story angles; Media/Social Media strategy and promotion	Assist in providing content for selected Community website, social media, and other additional content (i.e. blogs, letters to editor); Assist in pitching stories for local media coverage; May utilize town-wide resources (i.e. email listings, tax bill inserts), if appropriate	Work with marketing consultant, Solar Ambassador(s), and volunteers to support outreach; Will develop a portal to facilitate customer sign up
Solar Installations	Leverage communications opportunities from early solar installations (if possible)	Leverage outreach opportunities from early solar installations (if possible); Outline permitting process for solar PV projects in community	Provide site assessments, customer services, system design, and a turnkey installation to customers;
Program Administration	Facilitate bi-weekly check-in calls	Participate in bi-weekly check-in calls	Participate in bi-weekly check-in calls; Will provide weekly metrics to Program Administrators

Chart 1: Outline of anticipated roles of the different Program participants.

It is expected that the primary points of contact for the selected Community, the three Program Administrators, and the selected Installer(s) will participate in a bi-weekly check-in call. At program kick off, all parties will work to find a date and time for this call. The Program Administrators may request weekly meetings during the first few weeks of the program. In addition, all parties will agree to share all communication email lists, including the contact information for all leads generated during the course of the program. Disclaimers are required on all Installer(s) signup sheets used at solar workshops or other tabling events indicating that information collected on behalf on the Solarize program will not be sold or shared with anyone or any agency outside of the Program Administrators.



7. Program Marketing Support – Marketing Consultant

The marketing consultant, when selected, will assist the selected Community, community groups, grassroots civic organizations, and the selected Installer(s) to deploy the marketing and outreach plan as developed by the selected Community. Each of the selected Community's marketing and outreach plan will be available for Installer(s) to review and coordinate with their applications to this RFA. The plans will be available on the OER Solarize website on April 13, 2016.

The strategy for the marketing and outreach plan is to create and enhance local interest in solar PV technology, as well as alleviate some of the marketing and acquisition costs for an Installer associated with residential PV installations. Specifically the marketing consultant will:

- a. Coordinate with the Program Administrators, the selected Installer(s), and the selected Community on education, marketing and outreach including developing a local campaign strategy; organize and participate in certain meetings and events, including solar workshops; provide standardized marketing materials, as well as drafting and coordinating media opportunities;
- b. Provide content management for the Solarize RI webpage and forward website generated leads to the selected Installer(s). Manage web presence and social media for the Program;
- c. Convene bi-weekly meetings or conference calls to coordinate between the Program Administrators, the selected Community, and the selected Installer(s).

9

8. OER and Commerce RI Commitment

OER and Commerce RI agree to provide the Installer(s) with the following:

- a. Responsible for overall Solarize RI, REF Small Scale Solar program administration, REG Small Scale program administration, and addressing issues relating to contracts.⁹
- b. Will provide assistance, along with other Program Administrators, to address issues related to contracts and community relations during the campaign.¹⁰
- c. Make available the REF Small Scale Solar Program to eligible customers that apply through the Installer(s), at the incentive rate outlined in the Small Scale Solar Program at the time of grant application. This information will be available to the selected Installer(s) on the Commerce RI website. Each application submitted by the Installer(s) to Commerce RI must meet the REF Small Scale Solar program rules and regulations and Minimum Technical Requirements in order to qualify for the grant.
- d. Work with other Program Administrators on the Solarize RI brand and ensure that all logos and license numbers from the selected Installer(s) are on all marketing material published under this Program.

⁹ OER will work with National Grid on gathering application and completion documentation for REG projects.

¹⁰ The Installer(s) is expected to provide customer service, answer customer questions related to contracts in a timely manner, and address customer complaints, if any.



- e. Assist the selected Installer(s) on the solar education in the selected Communities.
- f. Facilitate a bi-weekly phone call between the Program Administrators, the selected Community, and the selected Installer(s).

9. Incentives – REF and REG

Installers are expected to provide the best turnkey customer service possible as part of the Solarize RI program. Part of that turnkey service is to help homeowners and business owners navigate the available incentives. Customers are allowed to choose between the Renewable Energy Fund or the Renewable Energy Growth Program. Once educated about the two programs, customers will sign a contract with the Installer(s) for one of the two programs. If funding is no longer available for the REF incentive program, the REG program should be exclusively offered to customers. More information can be found here:

REF - <http://commerceri.com/finance-business/renewable-energy-fund/>

REG – www.ngrid.com/regrowth

10. Installer Commitment

The following Terms and Conditions are agreed to by the Installer(s) upon acceptance by OER of this Application. For purposes of this Section, Contractor and Installer shall have the same meaning and Contract and Proposal shall have the same meaning. Installer(s) agree to execute a Letter Agreement with OER agreeing to the Terms and Conditions listed below.

- a. The Installer(s) will provide the Program Administrators the community contacts with weekly data as requested, including but not limited to, the number of community initial interest contacts, number of site visits completed, number of feasible sites, number of signed contracts, and contracted capacity. Customer names, email addresses, and phone numbers will also be included as part of the metric data. Once selected, the Installer(s) will receive the metric spreadsheet form and they will be due to OER by Monday at 5:00pm for the prior week (Monday through Sunday at midnight);
- b. The Installer(s) will be able to contract with customers through September 8, 2017, and will have six months to submit eligible applications to the REF Small Scale Solar program or National Grid’s REG Program in a timely manner.
- c. The Installer(s) commits to providing customers with the tiered pricing outlined in Attachment B. All adders will be clearly defined in all turnkey contracts to customers. The Installer will offer the equipment as outlined in Attachment B and will notify Project Administrators if the proposed equipment is unavailable before project installation;
- d. The Installer(s) will be required to provide the Program Administrators with a final report outlining the total number of contracted customers within the community and the resulting prices associated with each installation. If at any time during the Program, a customer cancels a contract, the Installer(s) will need to notify the Program Administrators within two (2) weeks of the cancellation and the reason why the project is not moving forward;



- e. The Installer(s) is expected to be familiar with the REF Minimum Technical Requirements¹¹. All Solarize Rhode Island projects contracted during the sign up period and applying for the REF program will comply with those requirements.
- f. The Installer(s) agree to work with Program Administrators on referring to the brand as “Solarize RI” and “Solarize Selected Community” on all Program documentation. The Installer(s) will provide the Program Administrators the Installer(s) company logos and contractor license numbers to use on Program documentation. All relevant license numbers and logos, including the Solarize RI logo, will be used in all community outreach materials, websites, and other marketing materials. Any material produced for distribution for the Program will need to be approved by the Program Administrators in advance;
- g. Collaborate with Program Administrators on all press releases, events, or news conferences concerning the Program. In any media produced by the Installer(s), the Installer(s) will not claim to represent the opinion or position of Commerce RI, the State of Rhode Island, the RI Office of Energy Resources, the selected City or Town, or the selected marketing consultant;
- h. Work with Program Administrators to develop additional marketing materials, including, but not limited to, providing photographs or other information for use in marketing the Program, and collaborate in obtaining photographs (using the Commerce RI Media Consent Form) and statements of support from Solarize customers for use on the Solarize RI website;
- i. Include a disclaimer on all Installer(s) customer intake forms and media (such as website and sign-sheets) that outlines how customer contact information may be used under the Program and provide the customer with the ability to opt out of any communication unrelated to solar PV installations under the Program;
- j. Provide complete and accurate customer and lead contact information to the Program Administrators within five (5) business days of the conclusion of the campaign, including full name, email address, phone number, incentive program information, and addresses. In addition, the Installer(s) will provide complete and accurate information for all non-feasible leads (as determined by actual site visits or satellite image screening) to the Program Administrators on a monthly basis;
- k. Installer(s) agree to participate in any appropriate marketing and outreach events within the selected Community as well as any community meetings organized by the Program Administrators;
- l. Agree to provide feedback at the end of the campaign on the effectiveness of various marketing materials, outreach strategies, and general Program matters, including completion of an evaluation survey;
- m. Participate in bi-weekly phone calls with the Program Administrators and selected Community;

¹¹ <https://drive.google.com/file/d/0B4my6hqps6ziZIV3eTRRNOFzMXM/view>



- n. Installer(s) agree not to market under the Solarize Rhode Island tagline in other future Solarize communities other than the selected Community with which they are working during the Spring 2017 Solarize program;
- o. During the performance of this Agreement, the Contractor and its subcontractors shall comply with all applicable federal, state, and local laws, rules and regulations in regard to nondiscrimination in employment because of sex, sexual orientation, race, color, ancestry, religious creed, national origin, disability, medical condition, age, marital status, and denial of family care leave. The Contractor shall include the nondiscrimination and compliance provisions of this clause in all subcontracts to perform work under this Agreement;
- p. That no gratuities (in the form of entertainment, gifts, or otherwise) were offered or given by Contractor, or any agent or representative of Contractor, to any officer or employee of the State of Rhode Island with a view toward securing this Agreement, or securing favorable treatment with respect to any determinations concerning the performance of this Agreement. For breach or violation of this warranty, OER shall have the right to terminate this Agreement, either in whole or in part, and any loss or damage sustained by OER in procuring on the open market any services which Contractor agreed to supply shall be borne and paid for by Contractor. The rights and remedies provided in this clause shall not be exclusive and are in addition to any other rights and remedies provided by law or in equity;
- q. Installer acknowledges that all submissions (including those of parties not selected for engagement) may be made available to the public on request (pursuant to the Rhode Island Access to Public Records Act, R.I.G.L. § 38-1-1 et seq.) upon the completion of the process and award of a contract or contracts. Accordingly, any information included in the application that the Installer believes to be proprietary or confidential should be clearly identified as such.
- r. Contractor certifies that it is insured against liability for Workers' Compensation and liability insurance and affirms that it will maintain Workers' Compensation Insurance and liability insurance during the term of the Program and indemnify the State of Rhode Island from any liability for violating this provision. Contractor shall require any and all subcontractor(s) to include such a provision in all subcontracts to perform work under this Agreement;
- s. Contractor certifies that it has received a Renewable Energy Professional Certificate or holds an "A" electrical license with the Rhode Island Department of Labor and Training;
- t. Contractor certifies that it has received a RI General Contractor's License number and has provided that license number to the Program Administrators. **Contractor shall require any and all subcontractor(s) to have a RI General Contractor's license number and will provide the Program Administrators the list of subcontractors and their license numbers at the beginning of the Spring 2017 Solarize program. If additional subcontractors are added during the Solarize campaign, the Contractor certifies it will submit that subcontractor's information to the Program Administrators.**¹²

¹² <http://www.crb.ri.gov/contractorregistration/index.php>



- u. Contractor certifies that it and any and all subcontractors are registered with the Rhode Island Secretary of State. If additional subcontractors are added during the Solarize program, the Contractor certifies it will inform the Program Administrators and submit verification of subcontractor registration with the RI Secretary of State.
- v. OER shall not be liable to the Installer 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, in connection with the performance of this Agreement;
- w. This Agreement shall remain in effect for one (1) year after the Solarize Program sign up period ends;
- x. The Contractor has obtained, will obtain, and shall maintain and comply during the term of this Agreement, with any and all applicable federal, state and local reviews, consents, authorizations, approvals and licenses required by law for the Program and shall indemnify, defend and hold the State of Rhode Island, and each of its officers, agents, employees and consultants harmless from and against any and all suits, damages, claims, causes of actions, demands, judgments, penalties, costs, expenses, attorneys' fees and any and all injuries to persons or property and all other matters arising out of or incurred in as a result of the Contractor's violation of this provision;

In addition, it is expected that Installer(s) will provide all necessary information to customers about the available incentives, possible adders they might need, and the tiered pricing structure. Installer(s) will be encouraged to provide transparency of all three in both proposals and contracts customer receive with the Solarize Rhode Island program.

11. Scope of Work

Installer applications are due to OER on May 23rd, 2017. On April 13, 2017 the selected Community's marketing and outreach plan will be posted on the OER Solarize website. It is encouraged that Contractors bidding on this RFA tailor their applications to the selected Community's marketing and outreach plan.

Once selected, the Installer(s) will work with the selected Community and the Program Administrators on further refining the marketing and outreach strategy specific to the selected Community and begin plans for implementation. Shortly after being selected, the Installer will be introduced by the City or Town as the selected Installer for the Program and the Solarize Rhode Island website will be begin lead intake.

As leads are identified, the Installer(s) will provide site assessments (as appropriate) and system designs for individual solar PV projects. The site assessment will evaluate a site's suitability for solar PV, including shading, onsite load, and any electrical, structural, or mechanical issues that may increase the cost of the solar PV project relative to the proposed price. The system design should maximize system production while minimizing project cost.



In order to be eligible for the Program, residential and small scale commercial projects must meet all of the requirements currently outlined in the REF or REG program documentation. Adder forms for ALL projects will be required regardless of which incentive program is being utilized.

In addition, the selected installer(s) must have a Renewable Energy Professional (REP) certificate and/or hold a valid A Electrical License. In addition, the installer must be registered with the RI Secretary of State and hold a valid RI General Contractor's license. If applying as a consortium, all companies applying in the consortium must be registered and/or licensed, as applicable with the RI Secretary of State and hold a valid RI General Contractor's license. All installers, consortium companies, and subcontractors must hold these licenses and/or registrations in order to participate in the Solarize Rhode Island program. Please provide photocopies of these licenses with the application.

Upon receiving the executed Letter Agreement from OER, the Installer(s) will be responsible for providing each contracted customer with a turnkey service, which includes securing all local permits, applying for either the REF or REG incentive program, and completing the installation within one year of the conclusion of the Solarize sign up period. In addition, the Installer(s) will be expected to provide information regarding net metering, energy efficiency, and any other federal or state incentives available to the customer.

The installer(s) must follow up with all customers who request a site visit or survey with more information about the Program and provide options for non-feasible sites. The Installer(s) and the Project Administrators must identify in this application a process for handling leads that have non-feasible sites for solar PV. Examples may include offering individuals with non-feasible sites more information on other technology options, such as energy efficiency or SDHW, or requesting potential assistance from the Solarize RI Community volunteer team.

12. Application Requirements

This RFA for installer(s) is specific to the 2017 Spring round of Solarize RI and not for any future Solarize rounds under the Program. All applications will receive a threshold review by OER and Commerce RI to determine eligibility.

Installers are eligible to submit multiple applications for the selected Communities. However, for the Spring 2017 round of Solarize, **installers may only bid on a maximum of 3 Communities**. It is strongly encouraged that Installer(s) consider the size of the Community and how many Communities they could take on. If applying for multiple Communities, Installer(s) should make sure to tailor each application to the specific Community's marketing and outreach plan.

Applications must contain the following:

- a. **Executive Summary:** The Executive Summary should state that the Installer(s) are applying for the 2017 Spring round of Solarize RI. It should summarize the highlights of the application, key features and distinguishing points of the application, as well as any unique problems perceived by the Installer(s) and proposed solutions.
- b. **Application Team Experience:** Identify all members of the project team, including but not limited to, partners assisting in project financing, customer service, outreach, project



installations, and other relevant services.¹³ Include an organizational chart outlining the various key individuals and partners, including any subcontractors, a description of each and attach resumes, of all key individuals on the project. Valid copies of all licenses and registrations for the Applicant and its subcontractors must be included. These licenses and registrations include the Renewable Energy Professional certificate, verification with the RI Secretary of State that the company is licensed to do business in RI, RI General Contractor licenses, and RI Electrical licenses. Consortiums of Installers are welcome; however one Installer of the Consortium must be the lead company on the application. Applications must include the following:

- i. Description of the applying Installer, including company size, financial stability, location, capacity for work, and access to various supply chains. Highlight relevant experience, skills, and capabilities necessary to undertake this Program, including but not limited to demonstrated experience through a minimum of ten (10) installed and interconnected solar PV projects¹⁴.
 - ii. Identify how many residential and small scale commercial installations (under 250kW) have been completed to date and how many have been completed (interconnected) in Rhode Island.
 - iii. Identify the team member(s) who will be participating on the bi-weekly calls.
 - iv. Provide a list of any partners on the project team that are located in or near the selected Community
 - v. Identify any partners that are local to the selected Community and/or are focused on sustainable business practices.
 - vi. Optional: Propose a partner or contact who can install solar hot water systems, other renewable technology, or other energy efficiency measures.
- c. **Proposal Narrative:** This section in the application should outline a detailed and solid strategy that should at a minimum address the following items:
- i. **Program Plan:** Provide a plan for implementation, describing the proposing Installer's ability to provide solar PV installation services to the selected Community during the Program period. Specifically, the application should describe the Installer(s) ability to provide timely customer service, site assessments, incentive applications submissions, installation services, and workmanship warranty. Elaborate on the specific intake process for customer leads, method for screening sites, and an installation schedule for tiered levels of the solar PV capacity. Include an estimate of the number of small scale solar PV projects the installation team can complete on a monthly basis. Describe a quality assurance process for the solar PV installations and outline the process for

¹³ Examples of project partners include specific banks assisting with project financing, subcontractors assisting with lead acquisition, or any electrical subcontractors that may do work associated with the Solarize Rhode Island program.

¹⁴ The Installer may provide examples of PV installations outside of Rhode Island.



managing any permits, inspections, and the interconnection process with National Grid. Finally, outline the quality of the proposed equipment and how the installation process will be explained to the customer.

- ii. **Timeline:** Provide an expected timeline for the average customer under the Program to guide the Community and the customer expectations.
- iii. **Marketing Strategy:** Outline a marketing plan that describes methods to motivate community-driven solar PV installations. The plan should include a description of how a joint marketing strategy between the selected Community and the Installer(s) can expand the number of PV projects within the community. Include ideas by which the selected Community’s outreach plan can be leveraged to generate leads more likely to move forward. Identify any potential community partners that may be able to assist in deploying or enhancing the marketing strategy. Cite specific examples of marketing services that will provided, items, or marketing materials that will be produced (lawn signs, banners, etc.) or (if available) dollars that will be allocated to support the Community’s efforts.
- iv. **Geographic Proximity:** Provide a plan to address the Installer’s geographic proximity to the selected Community and how this will shape the services provided.
- v. **Plan for large volume:** The Project Administrators anticipate that large volumes of installations could occur through the Solarize RI program. Installers should identify both the number of installations that could be reasonably handled as well as details for a contingency plan if outreach results in contracting a large number of PV projects. Strategies may include identification of a subcontracted installer, formation of an installer consortium, access to out-of-state crews, hiring of additional sales or administrative staff, or another strategy. Installer(s) should also identify the “ramp up” plan that outlines a plan to accommodate the anticipated increase in volume in response to leads, site visits, and follow up visits as well as community events and meetings.¹⁵
- vi. **Tiered Pricing Structure:** Outline the Purchase Price and the optional lease/PPA price, and the optional lease/PPA financial incentive on the *Pricing Proposal* (Attachment B), based on a total capacity (DC @STC) of solar PV contracted using the following three tiers:

Tier 1	Tier 2	Tier 3
1kW – 50kW	51kW-150kW	151kW+

As total contracted capacity increases by tier, the Installer’s proposed cost per watt (\$/W) must decrease for customers that purchase a system under the Program.

¹⁵ Any subcontractors that are hired outside of this proposal must provide additional information to the Program Administrators. See Section 10.s. for more information on this requirement.



Optional: Installer(s) may propose a \$/kWh lease/PPA price for customers that sign a third party ownership contract and will note an additional financial incentive as higher tiers of aggregate contracted capacity within the Community are reached. Examples of the financial incentive can include a rebate, gift card, or other financial incentive. However, the agreed upon financial incentive should be consistent across all customers and needs to be disclosed on the weekly metric forms submitted to OER.

Pricing proposals to the selected Community's customers should include total installation costs, which includes system design, permitting, applicable materials and equipment, transportation, labor, and all equipment and workmanship warranties. In addition, it is highly encouraged that installer explain possible adder costs within the proposal. The price should be independent of any tax credits or incentives available to the customer.

Installer(s) should refer to and complete the *Pricing Proposal* (Attachment B). Information on Attachment B must be electronic, hand written documents will not be accepted. Project specific pricing will not be considered for this Program. In addition, OER will not recognize any project-related cost adders if they are not outlined in Attachment B at the time of application.

A copy of the standard agreement for purchased systems should be included in the application.

Optional: If bidding with a lease/PPA price, provide a copy of the standard lease or PPA agreement. Also, the Installer(s) should clearly identify any criteria in which a price escalator may be present for customers, and include a maximum range for the price escalator.

Note: As of December 31, 2016 the average cost for installed direct purchased residential PV systems under the REF Small Scale Solar program was \$3.95/watt.¹⁶ The Small Scale REG program projects cost/watt received by National Grid to date is unknown at this time.

- vii. **Price Contingencies (Adders):** It is understood that features of certain installations will result in higher costs. Installers must outline specific electrical, mechanical, structural, equipment, site, or labor features that will result in higher costs. Adders should be listed as a \$/watt cost for Purchased projects. Optional: if bidding a lease/PPA price adders should be listed as a \$/kWh cost. Also, the Installer(s) may list an adder as a flat cost for Purchased projects
- viii. **System Specifications:** Identify system specifications for equipment that will be used for projects going through the Program, including equipment manufacturers, models, and warranties for modules, inverters, racking, meters, and data acquisition systems (if

¹⁶ All installed battery backup systems were removed from this analysis as outliers.



applicable). The project administrators are interested in high quality as well as cost competitive equipment.

- ix. **Proposal for sites that are not feasible for solar PV:** Outline the process by which the Installer(s) will handle the leads that do not have feasible sites for solar PV.

- d. **References:** Provide references for three (3) residential projects and one (1) commercial solar project that may be contacted to discuss customer experience (including a name, location, date of installation, phone number and email address). All projects listed in the reference section must be interconnected and operational.

13. Application Format

This section outlines the content and format requirements for all Applications.

- a. Executive Summary
- b. Proposal Team Experience
- c. Proposal Narrative
- d. References
- e. Signed and Completed Attachment A
- f. Completed Attachment B in Word format
- g. Copy of Direct Purchase contract(s) and optional Lease/PPA contract

One copy of the application must be delivered via electronic format, including a scanned signature page (Attachment A) and a finalized Pricing proposal (Attachment B) in Word format by email to DOA.SolarizeRI@energy.ri.gov. **All applications are due to OER by 4:00pm on May 23, 2017.** Any changes to this date or the timeline will be updated on the OER Solarize website. No late submissions will be accepted. All email submissions should include "Solarize 'Selected Community' RFA" in the subject line.

14. Evaluation Criteria

All applications must meet the Solarize RI Program objectives and must be responsive to the relevant scope of work and application requirements outlined above. Applications will be evaluated on the general criteria below:

- a. **Threshold Requirements:** Applications must meet a threshold review before they will be provided to the Community External Review Team. To meet the threshold review, applications must include the following:
 - i. Installer(s) must have a Renewable Energy Professional Certificate or hold a valid A Electrical License. Copies of all licenses for the Applicant and its subcontractors must be included with the application, including any RI General Contractor licenses and RI Electrical licenses. Installer(s) must also submit verification that the Installer(s) are licensed and/or registered, as applicable to do business in Rhode Island with the RI Secretary of State.
 - ii. A minimum of ten (10) installed and interconnected PV projects.
 - iii. Completed and signed Attachments A and B
 - iv. Proposed program plan



- v. A direct purchase tier price (presented as a \$/watt) and an Optional lease/PPA price (presented as a \$/kWh) with corresponding PPA/lease financial incentive on Attachment B.
 - vi. The proposed Purchase Price to the customer **must** decrease by each of the three tiers. Note: the price drop can be different between tiers.
 - vii. Identify any project price adders on Attachment B.
 - viii. A template copy of a direct purchase contract
 - ix. Optional: a template copy of the proposed lease/PPA agreement, specifying terms and conditions and an explanation of any escalators
- b. **Additional Requirements:** Once the Installer application passes threshold review, the applications will be evaluated by the Program Administrators and the Community External Review Team based on the following criteria:
- i. **Overall quality and value:** overall quality of application and specified equipment;
 - ii. **Experience:** degree of Installer’s experience and proficiency in the scope of work, including demonstrated experience in developing, designing, and installing small-scale solar PV systems. In addition, experience of Installer team. If applying as a consortium, provide the experience of the Installer companies in the consortium and (if any) past experience working together.
 - iii. **Implementation:** ability to provide timely, quality customer service and installations as well as ability to work well with the selected Community, and ability to submit timely metrics as well as incentive applications to either the REF or REG Programs.
 - iv. **Price structure:** quality and simplicity of pricing proposal for Purchase Price (\$/kW) and optional lease/PPA price (\$/kWh) and corresponding financial incentive. In addition, the value offered by proposed equipment, price adders, price escalators (if any) and contract term and conditions.
 - v. **Demonstration of innovative concepts:** additional consideration will be given to Installer(s) that can provide innovative business models, or have options for other technologies such as Solar Hot Water, energy efficiency, etc.
 - vi. **Marketing Plan:** ability of application to drive community adoption of solar PV projects and drive down the cost of residential and small scale solar PV installations.

15. Timeline

The new proposed timeline for the Spring 2017 Solarize Rhode Island program is outlined below.

Spring 2017 Solarize Rhode Island Schedule	Dates
RFA for Solarize Installer Released	April 13, 2017
Installer RFA Questions Due	May 15, 2017
Installer RFA FAQ Posted	May 18, 2017
Installer RFA Due	May 23, 2017 @ 4:00pm
Community-Installer Interview	June 5, 2017



Announce Selected Solar PV Installers and Program Kick off Event	June 7, 2017
Customer Sign-Up Period Begins	June 7, 2017
Customer Sign-Up Period Ends	September 8, 2017

- a. Responses to this RFA must be received by OER no later than 4:00pm on May 23, 2017. Only complete, timely applications will be considered. OER, at its sole discretion, may determine whether an application is timely and complete.
- b. Installer(s) must be available to meet with the External Review Team on June 7, 2017 if an interview is determined to be necessary. At least one representative from the Installer team must attend in person. If a consortium of Installers is applying, one representative from each company must attend in person.
- c. The application must be delivered via electronic format, including a scanned signature page (Attachment A) and a finalized Pricing proposal (Attachment B) in Word format either by email to DOA.SolarizeRI@energy.ri.gov. All email submissions should include "Solarize 'Selected Community' RFA" in the subject line.

16. Questions and Contact Information

Questions regarding this RFA should be submitted via email to DOA.SolarizeRI@energy.ri.gov with the subject line "Solarize RI Installer RFA" by May 15, 2017. All questions and answers will be posted on the OER Solarize website no later than May 18, 2017.

17. Negotiations

OER selection of an Installer through this RFA is not an offer and OER reserves the right to continue negotiations with the selected Installer(s) and the each Community until the parties reach a mutual agreement. OER reserves the right to reject any or all responses; waive defects or irregularities in any response; enter into discussions with selected bidders; discontinue discussions with any bidder at any time and for any reason; correct inaccurate submissions; change the timing or sequence of activities related to this program; modify, suspend or cancel this program.

18. Disclaimer

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

